



UK CREATIVE INDUSTRIES TRACKER SURVEY, Q2 2016

SUMMARY:

The UK referendum on EU membership impacted on international views of UK business in the second quarter of 2016, according to the latest UK Creative Industries Tracker Survey.

Although respondents acknowledged the Brexit vote generated headlines in international markets, most said sentiment towards UK creative industries either improved or remained unchanged during Q2. However, respondents thought sentiment to UK creative firms could worsen in the next three months.

Other Q2 2016 survey findings include:

- **46 per cent** of respondents thought UK creative exports into their overseas markets increased in the previous three months
- **70 per cent** thought exports from international markets into the UK creative industries improved

LONDON, August 2016: The UK Creative Industries Tracker Survey suggests international sentiment towards Britain's creative industries remains strong despite the attention generated by the unexpected result of the country's EU referendum.

Although **50 per cent** of respondents thought sentiment towards the UK would remain unchanged in the next three months, the percentage of respondents who thought it would deteriorate during that period (**21 per cent**) was higher than the figure for the previous quarter (**15 per cent**).

Some respondents suggested the surprise Brexit vote demonstrated the ability of UK communications practitioners to influence public opinion. Elsewhere, architectural and film events and Shakespeare's anniversary initiatives showcased UK creativity.

Exporting and investing

The quarterly Tracker Survey questions trade advisers for UK Trade & Investment (UKTI) and the Foreign & Commonwealth Office and Morison KSi, the international association of professional services advisers and accountancy partners, about perceptions and activity involving the UK's creative sectors in territories worldwide.

Among respondents, **46 per cent (see Fig 1)** reported that exports from UK creative businesses into their own markets increased in the last three months. The same proportion thought this activity had remained unchanged. Only **8 per cent** thought the respondents believed UK creative exports declined.

FIG 1: EXPORTS BY THE UK CREATIVE INDUSTRIES

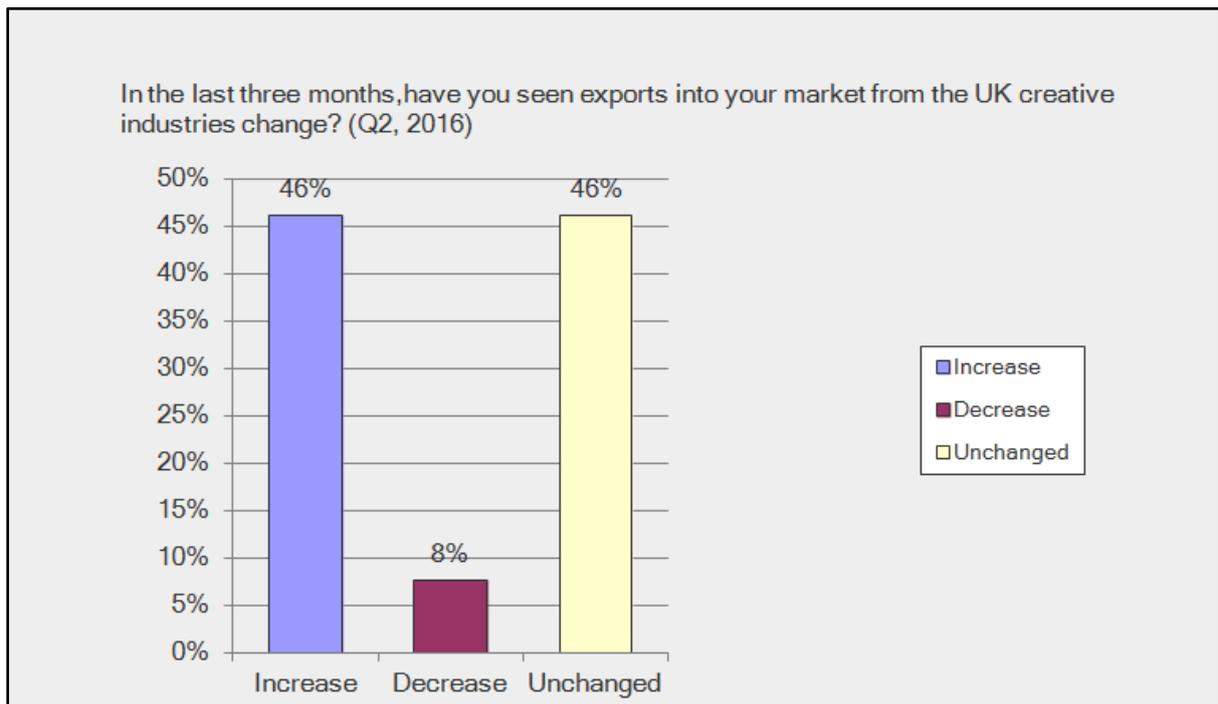
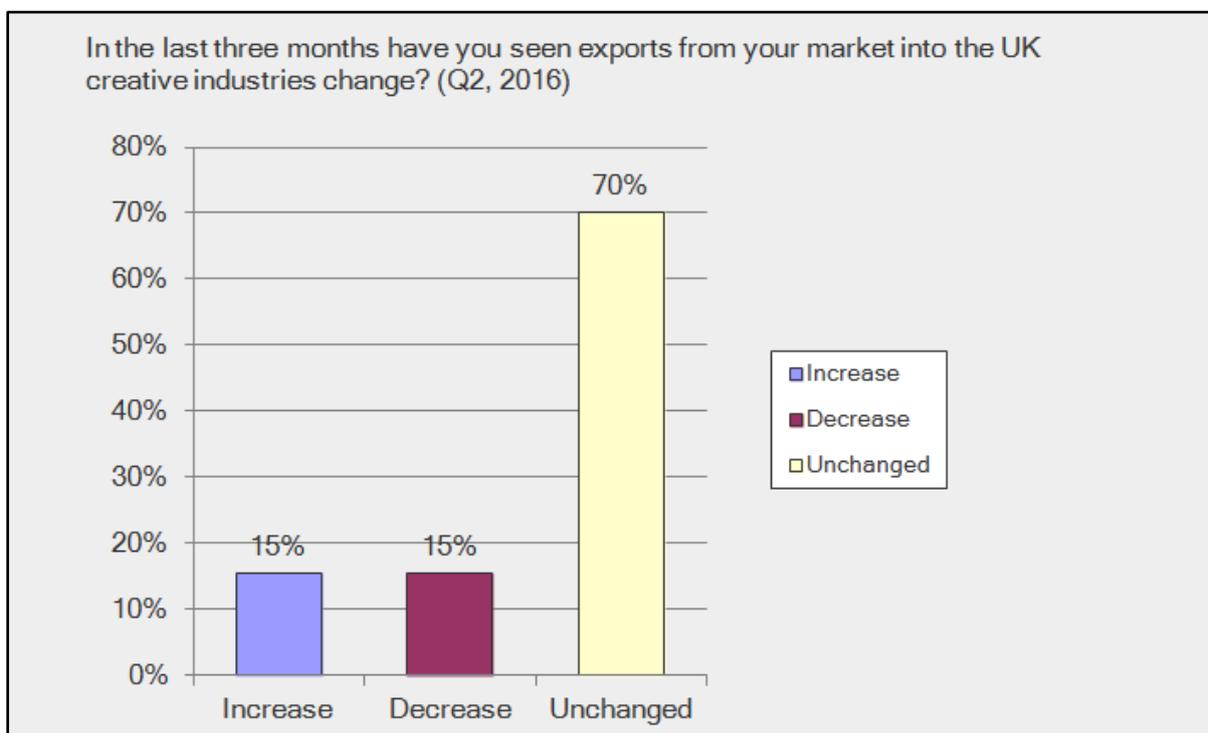


FIG2: FOREIGN TRADE WITH THE UK CREATIVE INDUSTRIES



In terms of sentiment, **54 per cent (see Fig 3)** of respondents thought sentiment towards the UK creative industries had improved in their markets in the previous three months. A further **31 per cent** thought sentiment was unchanged, and **15 per cent** thought it had declined.

The percentage of respondents expecting perceptions of the UK's creative industries to improve further in the following three months – the quarter following the Brexit vote – was **29 per cent**. This is lower than in previous quarters.

FIG 3: CURRENT OVERSEAS SENTIMENT TOWARDS CREATIVE INDUSTRIES

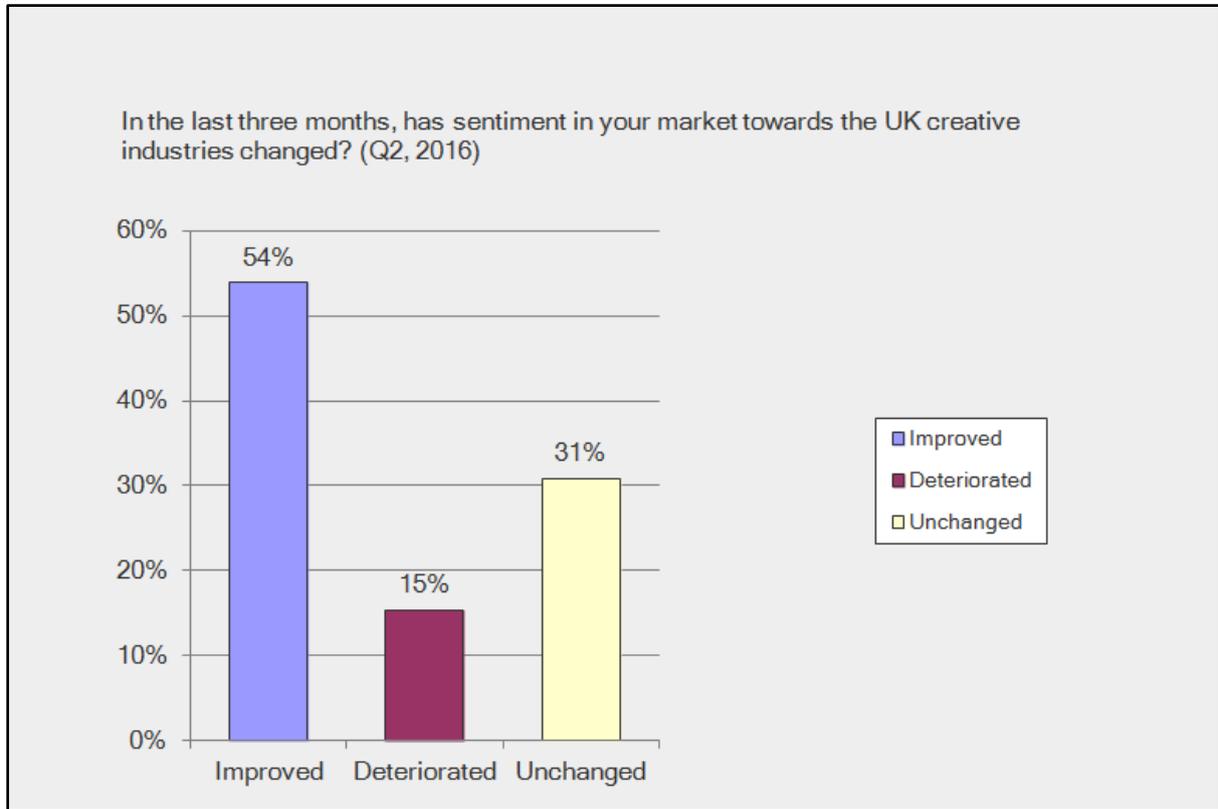
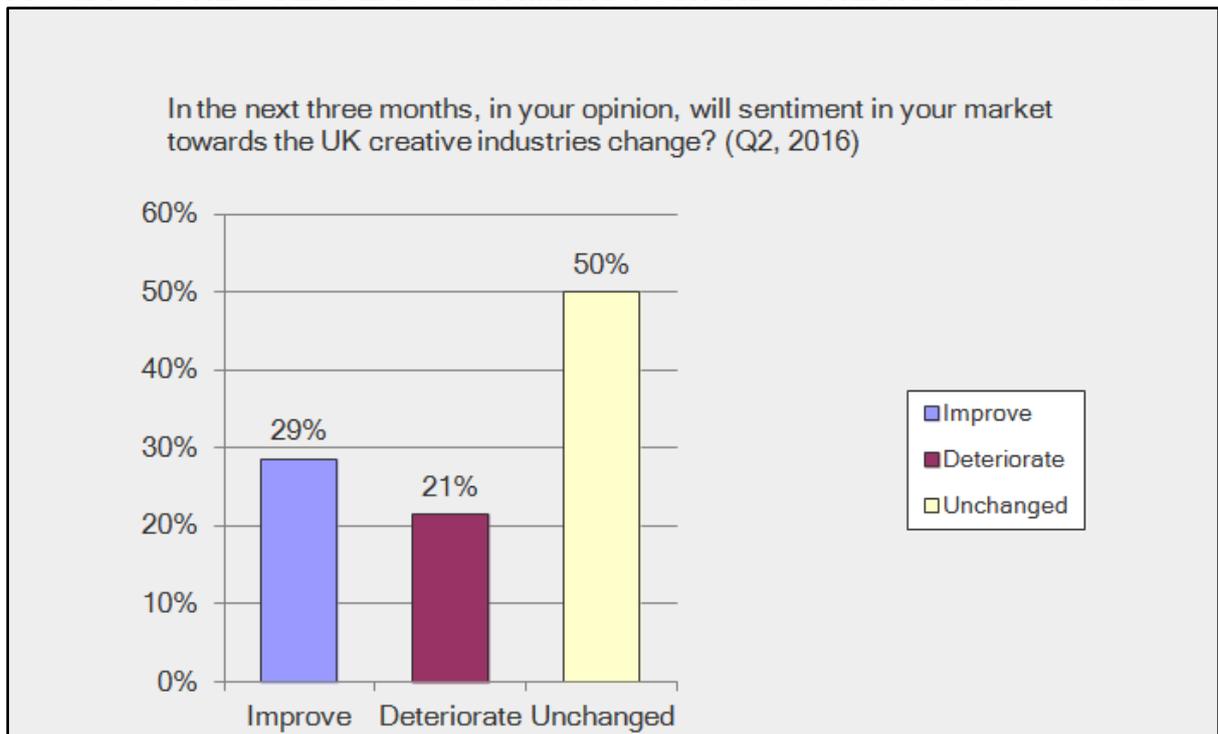


FIG 4: FUTURE OVERSEAS SENTIMENT TOWARDS CREATIVE INDUSTRIES

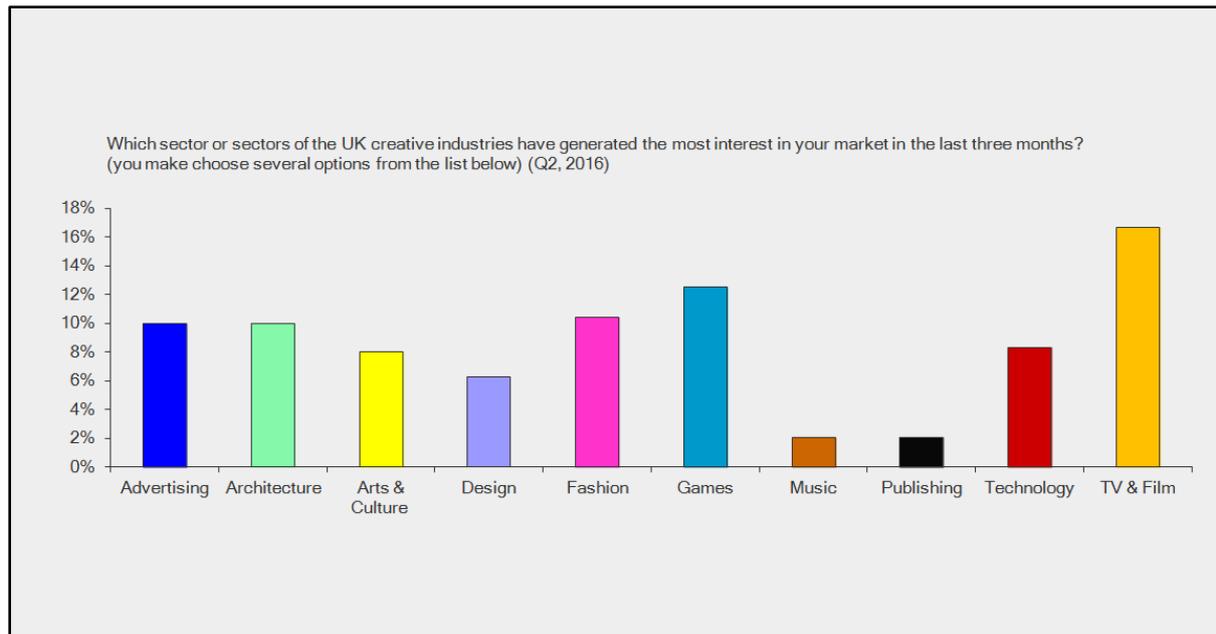


Although small in absolute terms (**21 per cent**), the percentage of respondents expecting sentiment to deteriorate in the next three months was higher than in the previous quarter (**15 per cent**).

Sector comparisons and awareness building events

Fig 5: UK CREATIVE SECTORS ATTRACING MOST OVERSEAS INTEREST

As in previous editions of the Tracker Survey, UK-made television and film provided the most effective creative platforms for generating overseas interest.



The successful exhibition of works by architect-designer Thomas Heatherwick, which attracted more than 170,000 visitors in Taipei, Taiwan, was a particular hit.

Also attracting interest was a series of Shakespeare events in Russia. This included a national programme about the playwright in the country's schools, an exhibition of portraits and a Shakespeare-themed train on the Moscow underground.

Other highlights singled out by respondents for showcasing British creativity included promotion of UK film via industry events in Canada.

About the Creative Industries Tracker Survey

The survey is sent to approximately 150 UKTI, FCO trade advisers and to experts from Morison KSi, the international association of professional services and accountancy experts. Survey data is collected four times a year.

Respondents in 13 countries completed the survey in July 2016. For further information, please email info@thecreativeindustries.co.uk

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