Creative Industries Economic Estimates Statistical Bulletin
January 2009

department for culture, media and sport

INTRODUCTION

This is the seventh annual Creative Industries Economic Estimates bulletin. The series began as a result of development work on official data sources following a commitment in the 2001 Creative Industries Mapping Document[1] to consider how to provide more timely and consistent data on the activity of the Creative Industries. The Mapping Document, and the previous version in 1998, outlined the sectors comprising the Creative Industries and it is this structure which forms the basis of these bulletins.

The classifications used by international convention for official statistics do not accurately reflect the structure of the Creative Industries and as such it is difficult to capture the full extent of activity. **Due to these constraints the figures throughout the bulletin are *estimates* and are not classed as National Statistics.**

HEADLINE FINDINGS

1. Contribution to the economy – Gross Value Added (Tables 1a and 1b)

- The Creative Industries, excluding Crafts and Design, **accounted for 6.4% of Gross Value Added (GVA) in 2006**[2].

- The Creative Industries **grew by an average of 4% per annum between 1997 and 2006**[3]. This compares to an average of 3% for the whole of the economy over this period.

- Software, Computer Games & Electronic Publishing has had the highest average growth (8% p.a.).

2. Exports of services (Table 2)

- Exports of services by the Creative Industries totalled **£16 billion in 2006**. This equated to 4.3% of all goods and services exported.

- 31% of the total Creative Industries exports were contributed by the Software, Computer Games & Electronic Publishing sector.

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[1] DCMS, *Creative Industries Mapping Document 2001*.
[2] Based on 11 of the 13 creative sectors – Crafts and Design are excluded from the total
[3] *Ibid*.

- In the summer quarter of 2007, **creative employment totalled just under 2 million jobs**. This comprised over 1.1 million jobs in the Creative Industries and over 800,000 further creative jobs within businesses outside these industries.

- Total creative employment increased from 1.6m in 1997 to 2m in 2007, an **average growth rate of 2% per annum**, compared to 1% for the whole of the economy over this period.

- The Software, Computer Games & Electronic Publishing sector, and the Design and Designer Fashion sector both showed growth in employment of 5% per annum between 1997 and 2007, the highest across the Creative Industries.

4. Numbers of businesses (Table 4)

- In 2008, there were an estimated **157,400 businesses** in the Creative Industries on the Inter-Departmental Business Register (IDBR). This represents **7.3% of all companies** on the IDBR, although the true proportion of enterprises that are in the Creative Industries is likely to be higher as certain sectors such as Crafts contain predominantly small businesses - see Annex C for further detail.

- Around two-thirds of the businesses in the Creative Industries are contained within two sectors; Software, Computer Games and Electronic Publishing (75,000 companies) and Music and the Visual & Performing Arts (31,200 companies).

NOTES

Revisions

Since the last bulletin (published October 2007) some revisions have been made to the methodology and source data.

Within the Radio and TV sector, there has been a significant revision to GVA series (Table 1a/1b). Some overestimation was identified in the data for 2005 which also was found to apply to earlier years (from 2000 onwards). The revision policy for ONS' Annual Business Inquiry means that there has been no revision to the published source data for years prior to 2005. However the series in this publication has been revised for the period 2000-04 using the trend in the employment series for the sector. These adjustments have therefore contributed to a lower estimate for GVA in the Creative Industries in all years since 2000.

The number of Creative businesses reported in Table 4 has increased significantly in 2008 due to a change in coverage of figures reported from the Inter-Departmental Business Register (IDBR). The figures have been enhanced to include enterprises based on PAYE employers that are not also registered for VAT (extending the previous scope from the previous VAT based enterprise figures). As this change affects the reporting of all companies in the IDBR, whilst the absolute number of creative businesses has increased, the proportion they make up of all businesses remains unchanged.

See Annex B for further detail on these, and other, revisions.

Interpretation of the figures

All readers should be aware that:

1. All figures are estimates since they draw on fixed assumptions of the correspondence between the definitions of the Creative Industries and the definitions used in official sources. These are shown in Annex A.

2. As far as possible National Statistics (NS) sources are used as the basis for the estimates to ensure consistency and hence comparability between sectors. Where NS data are not available other research has been used which may not have been subjected to the same quality checks. It therefore follows that these estimates, and some of the overall totals which may include these estimates, may not be as reliable as National Statistics.

3. With the exception of the number of businesses counts, sources are sample surveys. These data are thus subject to sampling errors, in particular when sample sizes are small for the detailed classifications. Therefore too much emphasis should not be placed on fluctuations in the figures.

4. Due to the structure of the official classifications used, it is necessary to combine 'Interactive Leisure Software' with 'Software and Computer Services' and 'Music' with 'Performing Arts' to produce these estimates.

5. All tables are for the UK, with the exception of Table 3 (employment) which relates to Great Britain.

Future work

This bulletin retains broadly the same framework for measuring the Creative Industries as in previous years. However, this framework is currently under review. DCMS will be consulting on proposed changes throughout 2009 and further details will become available over the next few months. DCMS published a paper looking at possible changes in September 2007 which can be accessed here: http://www.cep.culture.gov.uk/cepevidence2007.

Any framework changes will be undertaken with consideration of the recent changes to the Standard Industrial Classification structure (SIC 2007).

The evidence publication and review of bulletin methodology form part of the wider Creative Economy Programme (CEP), launched by DCMS in November 2005. The CEP aims to better understand the role the Creative Industries may play in the future of the UK economy and what role Government has in supporting these industries. In 2008 the CEP published *Creative Britain: New Talents for the New Economy* which, in partnership with BERR and DIUS, sets out 26 commitments outlining how Government will support the creative industries. For more information on the publication and the CEP, see http://www.culture.gov.uk/reference_library/publications/3572.aspx

Table 1a - Gross Value Added (GVA) of the Creative Industries, UK

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL** (excl. Crafts and Design)[1]	Crafts [2]	Design [2]
GVA at current prices (£ million)												
1997	3,400	3,100	260	280	1,900	2,700	6,500	9,800	3,500	**31,500**	n/a	n/a
1998	3,500	3,200	270	270	1,800	2,900	7,300	13,200	3,700	**36,300**	400	n/a
1999	5,500	3,200	320	300	2,100	3,100	8,000	13,900	4,600	**41,000**	n/a	n/a
2000	6,100	3,500	350	360	2,100	3,200	8,400	14,800	4,800	**43,700**	n/a	n/a
2001	5,500	3,600	390	320	1,800	3,100	8,800	16,300	4,800	**44,700**	n/a	n/a
2002	5,400	3,400	430	320	2,100	3,300	8,300	16,900	5,000	**45,000**	n/a	n/a
2003	5,200	4,000	470	330	2,400	3,600	8,600	19,800	4,900	**49,200**	n/a	n/a
2004	5,600	4,100	490	380	2,700	3,700	9,100	22,600	4,900	**53,600**	n/a	n/a
2005	6,700	4,700	460	430	2,900	3,300	9,600	24,700	4,900	**57,700**	n/a	11,600
2006	5,300	4,700	490	450	3,800	3,400	9,500	24,500	5,100	**57,300**	n/a	n/a
% of UK GVA												
1997	0.6%	0.5%	0.04%	0.05%	0.3%	0.5%	1.1%	1.7%	0.6%	**5.4%**	n/a	n/a
1998	0.6%	0.5%	0.04%	0.04%	0.3%	0.5%	1.2%	2.2%	0.6%	**6.0%**	n/a	n/a
1999	0.9%	0.5%	0.05%	0.05%	0.3%	0.5%	1.2%	2.2%	0.7%	**6.3%**	n/a	n/a
2000	0.9%	0.5%	0.05%	0.05%	0.3%	0.5%	1.2%	2.2%	0.7%	**6.5%**	n/a	n/a
2001	0.8%	0.5%	0.06%	0.04%	0.3%	0.4%	1.3%	2.3%	0.7%	**6.4%**	n/a	n/a
2002	0.7%	0.5%	0.06%	0.04%	0.3%	0.5%	1.1%	2.3%	0.7%	**6.2%**	n/a	n/a
2003	0.7%	0.5%	0.06%	0.04%	0.3%	0.5%	1.1%	2.6%	0.7%	**6.5%**	n/a	n/a
2004	0.7%	0.5%	0.06%	0.05%	0.3%	0.5%	1.1%	2.8%	0.6%	**6.6%**	n/a	n/a
2005	0.8%	0.5%	0.05%	0.05%	0.3%	0.4%	1.1%	2.9%	0.6%	**6.8%**	n/a	n/a
2006	0.6%	0.5%	0.05%	0.05%	0.4%	0.4%	1.1%	2.7%	0.6%	**6.4%**	n/a	n/a

Source: Annual Business Inquiry, Office for National Statistics, with the following exceptions:
Crafts - Creative Industries Mapping Document (1998) - turnover, see Annex B
Design - The Business of Design, Design Council - turnover for financial year, see Annex B

[1] Total excludes Crafts and Design as GVA figures are not available for these sectors

[2] Figures for crafts and design are for turnover, which is not directly comparable to GVA. See Annex B for more information. Design estimates may also include activity also included in other Creative Industry sectors, notably Architecture.

Table 1b - Growth in GVA of the Creative Industries, UK [1]

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL** (excl. Crafts and Design) [2]
1997-1998	0%	3%	0%	-7%	-9%	4%	9%	31%	3%	**12%**
1998-1999	52%	-4%	17%	7%	13%	4%	7%	3%	21%	**10%**
1999-2000	9%	8%	8%	18%	3%	3%	3%	5%	4%	**5%**
2000-2001	-11%	3%	10%	-13%	-19%	-7%	3%	8%	-4%	**0%**
2001-2002	-6%	-9%	6%	-2%	12%	4%	-9%	0%	2%	**-2%**
2002-2003	-6%	13%	7%	1%	11%	4%	0%	14%	-4%	**6%**
2003-2004	5%	1%	1%	13%	13%	0%	4%	11%	-4%	**6%**
2004-2005	13%	12%	-4%	8%	6%	-12%	4%	7%	-1%	**5%**
2005-2006	-23%	-2%	3%	2%	27%	3%	-3%	-3%	0%	**-3%**
Average 1997-2006	2%	2%	5%	3%	6%	0%	2%	8%	2%	**4%**

Source: as Table 1a.

[1] Estimates calculated from figures in Table 1a with implied GDP deflator (base = 2000) to remove the effect of inflation. Too much emphasis should not be placed on fluctuations between years (see note on interpretation of the figures)
[2] Total excludes Crafts and Design as annual GVA figures are not available for these sectors

Table 2 - Exports of services for the Creative Industries, UK [1]

£ million

	Advertising	Architecture	Art & Antiques	Design	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL [2]**	Crafts	Designer Fashion
1997	680	380	n/a	n/a	710	250	680	1,400	500	**n/a**	n/a	n/a
1998	630	470	n/a	n/a	680	250	830	1,700	640	**n/a**	40	350
1999	560	410	1,400	n/a	730	270	860	2,300	730	**n/a**	n/a	n/a
2000	710	420	2,000	1,000	940	300	950	2,500	690	**9,500**	n/a	n/a
2001	730	520	1,900	1,000	910	290	830	3,900	910	**11,000**	n/a	390
2002	890	510	2,300	1,200	840	280	790	3,500	1,000	**11,300**	n/a	n/a
2003	1,100	580	2,200	630	810	240	1,200	3,900	1,000	**11,600**	n/a	n/a
2004	1,100	570	2,200	550	940	150	1,500	4,700	1,300	**13,000**	n/a	n/a
2005	1,300	650	2,700	700	1,200	180	1,600	4,800	1,300	**14,600**	n/a	n/a
2006	1,400	740	3,100	830	1,100	270	2,100	4,900	1,400	**16,000**	n/a	n/a

Source: International Trade in Services, Office for National Statistics, with the following exceptions:

Art & Antiques - Antiques Trade Gazette analysis of HM Revenue and Customs data (UK exports to non-EU countries)

Crafts - Creative Industries Mapping Document (1998)

Design - Design Industry Valuation Survey, British Design Innovation – figures are for financial years

Designer Fashion - Design Fashion Report 1998, A study of the UK designer fashion sector, 2003 - both for BERR (then DTI)

[1] The main data source used is the International Trade in Services and does not include trade in goods.

[2] Total excludes Crafts and Designer Fashion as figures are not available for every year.

Table 3 - Creative employment, Great Britain [1]

Summer quarter [2]	Advertising	Architecture	Art & Antiques	Crafts	Design and Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL**
Employment in the Creative Industries											
2007	93,800	90,000	21,800	-	4,400 [3]	50,300	220,500	214,400	360,900	91,000	**1,147,100**
Employment in creative occupations in businesses outside the Creative Industries											
2007	153,400	30,700	-	109,700	126,300	15,100	42,300	61,400	280,000	12,300	**831,100**
Total Creative Employment											
1997	201,000	95,800	20,200	95,000	80,700	64,200	226,300	308,500	379,400	97,600	**1,568,700**
1998	204,200	101,500	19,800	119,800	88,800	64,100	217,800	317,100	426,000	101,500	**1,660,700**
1999	200,900	101,500	20,800	96,800	93,500	61,900	255,700	317,000	488,600	92,500	**1,729,300**
2000	206,000	102,600	20,900	111,300	98,500	67,500	224,300	283,900	544,600	109,800	**1,769,400**
2001	220,500	103,400	20,900	115,100	103,000	75,500	224,600	293,300	567,700	104,100	**1,828,100**
2002	215,400	102,900	21,400	114,100	115,000	68,900	240,800	286,800	556,700	108,800	**1,830,700**
2003	213,800	103,100	22,500	108,700	113,200	74,300	245,800	305,200	581,200	110,900	**1,878,800**
2004	200,000	102,600	22,500	112,900	110,400	65,500	232,300	274,300	593,900	110,600	**1,825,000**
2005	223,400	108,200	22,900	95,500	115,500	63,800	236,300	253,300	596,800	108,700	**1,824,400**
2006	230,300	111,300	21,700	99,300	118,700	57,500	257,200	269,700	631,300	109,400	**1,906,300**
2007	247,200	120,700	21,800	109,700	130,700	65,400	262,800	275,800	640,900	103,400	**1,978,200**
Annual growth											
1997-2007	*2%*	*2%*	*1%*	*1%*	*5%*	*0%*	*2%*	*-1%*	*5%*	*1%*	***2%***
2006-2007	*7%*	*8%*	*0%*	*11%*	*10%*	*14%*	*2%*	*2%*	*2%*	*-6%*	***4%***

Source: Labour Force Survey, Office for National Statistics - employees and self-employed, main and second job.

[1] The coverage of these data is broader than that of the other bulletin tables since it is possible to count not only jobs in the Creative Industries, but also jobs in creative occupations in business which are classed as being outside these industries, e.g. graphic designers working in a manufacturing firm.
[2] From 2006 the summer quarter covers July to September. Previously it covered June to August.
[3] As no SIC codes match the design sector, this estimate is for designer fashion only, see Annex A Table A1.

Table 4 - Numbers of businesses in the Creative Industries, UK [1]

	Advertising	Architecture	Art & Antiques	Designer Fashion	Video, Film & Photography	Music and the Visual & Performing Arts	Publishing	Software, Computer Games & Electronic Publishing	Radio & TV	**TOTAL**
1997	10,400	3,400	1,500	1,400	4,800	32,600	7,000	49,500	2,300	**112,900**
1998	10,300	3,300	1,600	1,300	5,500	32,500	6,800	52,600	2,300	**116,200**
1999	10,000	3,400	1,700	1,300	6,000	32,200	6,800	55,700	2,700	**119,800**
2000	10,000	3,300	1,800	1,300	6,500	32,500	6,700	56,700	3,000	**121,800**
2001	10,100	3,100	1,800	1,300	6,800	32,600	6,700	56,100	3,400	**121,900**
2002	10,100	3,000	1,800	1,300	7,400	32,300	6,700	55,800	3,600	**122,000**
2003	10,100	3,500	1,800	1,300	7,900	31,500	6,700	53,700	4,000	**120,500**
2004	9,800	4,100	1,700	1,400	8,000	30,100	6,500	49,100	4,200	**114,900**
2005	9,900	4,700	1,700	1,400	8,600	29,000	6,700	51,200	4,400	**117,500**
2006	10,100	5,300	1,700	1,500	8,900	28,300	6,700	53,500	4,700	**120,700**
2007	10,600	5,700	1,600	1,500	9,300	27,700	7,000	56,800	5,000	**125,300**
2008 [2]	13,200	8,500	1,600	2,800	11,000	31,200	8,200	75,000	6,000	**157,400**

Source: Inter-Departmental Business Register (IDBR), Office for National Statistics.

[1] As measured by the IDBR (see Annex C). Crafts and Design are therefore excluded as there are no corresponding SIC codes (see Annex A, Table A1).
[2] The number of businesses has increased significantly in 2008 due to a change in coverage of figures reported from the Inter-Departmental Business Register (IDBR). The figures have been enhanced to include enterprises based on PAYE employers that are not also registered for VAT (extending the previous scope from the previous VAT based enterprise figures).

ANNEX A – Mapping the Creative Industries to official data classifications

Table A1 - Assumption for correspondence between Creative Industries and the 2003 Standard Industrial Classification

Mapping Document Chapter	Sector	Standard Industrial Classification (SIC)		Proportion of code taken (*)
		Code	Description	
1	Advertising	74.40	Advertising	
2	Architecture	74.20	Architecture and engineering activities and related technical consultancy (‡)	✓
3	Art & Antiques	52.48	Other retail sale in specialised stores (‡)	✓
		52.50	Retail sale of second-hand goods in stores	✓
4	Crafts	Majority of businesses too small to be picked up in business surveys		
5	Design	No codes match this sector		
6	Designer Fashion	9 Codes	Clothing Manufacture (†)	✓
		74.87	Other business activities not elsewhere classified	✓
7	Video, Film & Photography	22.32	Reproduction of video recording	✓
		74.81	Photographic activities	✓
		92.11	Motion picture and video production	
		92.12	Motion picture and video distribution	
		92.13	Motion picture projection	
9 & 10	Music and the Visual & Performing Arts	22.14	Publishing of sound recordings	
		22.31	Reproduction of sound recording	✓
		92.31	Artistic and literary creation and interpretation	
		92.32	Operation of arts facilities	
		92.34	Other entertainment activities not elsewhere classified	✓
		92.72	Other recreational activities not elsewhere classified	✓
11	Publishing	22.11	Publishing of books	
		22.12	Publishing of newspapers	
		22.13	Publishing of journals and periodicals	
		22.15	Other publishing	✓
		92.40	News agency activities	

Table A1 (continued): Assumption for correspondence between Creative Industries and 2003 Standard Industrial Classification

Mapping Document Chapter	Sector	Standard Industrial Classification (SIC)		Proportion of code taken (*)
		SIC	Description	
8 & 12	Software, Computer Games & Electronic Publishing	22.33	Reproduction of computer media	✓
		72.21	Publishing of software	
		72.22	Other software consultancy and supply	
13	Radio & TV	92.20	Radio and television activities	

* As some SICs contain activity deemed to be outside of the Creative Industries, only a proportion of the total activity within these codes is included in the estimates (see Annex B).

† 9 Clothing Manufacturing codes used for Designer Fashion:
17.71, 17.72, 18.10, 18.21, 18.22, 18.23, 18.24, 18.30, 19.30

‡ For Table 4 (Numbers of Businesses), it is possible to use more specific '5 digit' codes for these 2 classes. These are 74.20/1 (Architectural activities) and 52.48/9 (Other retail sale in specialised stores not elsewhere classified).

Table A2 - Best-fitting SOC2000 codes for Creative Occupations (*to estimate number of creative jobs outside businesses in the Creative Industries*)

Mapping Document Chapter	Sector	Standard Occupational Classification (SOC)	
		SOC	Description
1	Advertising	1134	Advertising and Public Relations managers
		3433	Public Relations officers
		3543	Marketing associate professionals
2	Architecture	2431	Architects
		2432	Town Planners
		3121	Architectural technologists and Town Planning technicians
3	Art & Antiques	No codes match this sector	
4	Crafts	5491	Glass and Ceramics makers, decorators and finishers
		5492	Furniture makers, other craft woodworkers
		5493	Pattern makers (moulds)
		5494	Musical Instrument makers and tuners
		5495	Goldsmiths, Silversmiths, Precious Stone workers
		5496	Floral arrangers, Florists
		5499	Hand Craft occupations not elsewhere classified
		8112	Glass and Ceramics process operatives
		9121	Labourers in Building and Woodworking Trades (Δ)
5 & 6	Design & Designer Fashion	2126	Design and Development engineers
		3411	Artists
		3421	Graphic Designers
		3422	Product, Clothing and related designers
		5411	Weavers and Knitters
7	Video, Film & Photography	3434	Photographers and Audio-Visual equipment operators
9 & 10	Music and the Visual & Performing Arts	3412	Authors, Writers
		3413	Actors, Entertainers
		3414	Dancers and Choreographers
		3415	Musicians
		3416	Arts officers, producers and directors
11	Publishing	3431	Journalists, Newspaper and Periodical editors
		5421	Originators, Compositors and Print preparers
		5422	Printers
		5423	Bookbinders and Print finishers
		5424	Screen printers

Table A2 (continued) - Best-fitting SOC2000 codes for Creative Occupations (*to estimate number of creative jobs outside businesses in the Creative Industries*)

Mapping Document Chapter	Sector	Standard Occupational Classification (SOC)	
		SOC	Description
8 & 12	Software, Computer Games & Electronic Publishing	1136	Information and Communication Technology managers
		2131	IT Strategy and Planning professionals
13	Radio & TV	3432	Broadcasting associate professionals
		5244	TV, Video and Audio engineers

Δ Only a proportion of this SOC is taken

ANNEX B – Further Notes

1. Classifications

As shown in Annex A, the definitions for the Creative Industries are based on the UK Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC). However, the structure of these classifications means that for some SICs, identification of Creative Industries within *wider* industrial codes is required in order to produce the estimates in this bulletin. This is done by taking a proportion of the wider code – to represent only the part within the 'Creative Industries'. This methodology is currently being reviewed as discussed earlier in the Future Work section of this bulletin.

Minor revisions were made to the SIC in 2003. The implications of the change from SIC(98) to SIC(03) for this bulletin were minimal with only the definitions for the Designer Fashion and Software sectors being affected. Data from 2003 onwards for these sectors are therefore not entirely consistent with previous years.

A full revision of the SIC structure has recently been undertaken (SIC2007) and implementation has begun. These changes will have major implications for the future series and will be dealt with in the wider bulletin methodological review.

2. Revisions

The following revisions have been incorporated to the bulletin since the last publication in September 2007:

- Within the Radio and TV sector, there has been a significant revision to GVA series (Table 1a/1b). Some overestimation was identified in the data for 2005 which also was found to apply to earlier years (from 2000 onwards). The revision policy for ONS' Annual Business Inquiry means that there has been no revision to the published source data for years prior to 2005. As a primary use of the GVA data in Tables 1a and 1b is for trend analysis, the decision was taken to make the additional adjustments to published data for 2000-2004. The series for this period has been adjusted using the employment trend for Radio and TV (taken from the Labour Force Survey) as a proxy. In this way the series produces a more consistent trend over time that allows users to analyse patterns of growth (Table 1b). However this means that the series for the sector (SIC 92.20) is different to that published officially in the ABI. The original source data can be accessed here: http://www.statistics.gov.uk/abi/Section_o.asp. These adjustments have therefore contributed to a lower estimate for GVA in the Creative Industries in all years since 2000.
- In addition to SIC 92.20, ONS have revised source GVA data from the ABI for 2005 for a number of other SICs, so Tables 1a and 1b have been updated accordingly.
- All comparative series for the whole economy have been updated to reflect the latest estimates.
- The number of Creative businesses reported in Table 4 has increased significantly in 2008 due to a change in coverage of figures reported from the Inter-Departmental Business Register (IDBR). The figures have been enhanced to include enterprises based on PAYE employers that are not also registered for VAT (extending the previous scope from the previous VAT based enterprise figures). As this change

affects the reporting of all companies in the IDBR, whilst the absolute number of creative businesses has increased, the proportion they make up of all businesses remains unchanged.

3. Comparison to Input Output analyses figures for GVA (tables 1a & 1b)

The Creative Industries Economic Estimates differ significantly from those produced alongside National Statistics Input-Output analysis which is based on products rather than industries.

The most significant difference occurs from the input-output analysis not taking account of the fact that large proportions of data produced under the standard classification systems are not the result of creative activity. This causes some overestimation, for example since 'Clothing' is used in place of 'Designer Fashion'.

Finally, the input-output analyses exclude those sectors for which there is no official data, for example for Crafts and Design. This bulletin uses the best available data for these, which are industry estimates (though Crafts and Design are similarly excluded from total GVA estimates here).

4. Turnover data (tables 1a & 1b)

As the Crafts and Design sectors cannot be identified using official classifications, it is not possible to use the Annual Business Inquiry to obtain GVA data. Alternative sources are therefore used, but these measure turnover which differs from GVA for the following reasons:

(i) A turnover figure will always be greater than a corresponding GVA figure[4]. GVA can vary between 30% and 80% of turnover depending on the industry.
(ii) There may be some overlap in these estimates with data for other Creative Industries – particularly between Design and Architecture.

[4] This is because GVA measures the difference between the value of goods and services produced and the cost of raw materials and other inputs used up in production. Turnover measures just the value of sales of goods and services.

ANNEX C – Sources and References

1. DCMS, *Creative Industries Mapping Document 1998* (1998). Link

2. DCMS, *Creative Industries Mapping Document 2001* (2001). Link

3. DCMS Evidence Toolkit Link

4. Creative Economy Programme Link
   Creative Economy Programme Evidence Publication 2007 Link
   Evidence & Analysis Group – Draft Report Link

5. **ONS, Annual Business Inquiry (ABI)**
   The ABI estimates cover all UK businesses registered for VAT and/or PAYE, classified to the 1992 or 2003 Standard Industrial Classification. The ABI contains details on these businesses from the ONS Inter-Departmental Business Register (IDBR). For more information on the ABI see ONS website - ABI

6. **ONS, Inter-Departmental Business Register (IDBR)**
   The IDBR is the comprehensive list of UK businesses that is used by government for statistical purposes. The IDBR covers businesses in all parts of the economy, other than some very small businesses (self-employed and those without employees and low turnover) and some non-profit making organisations. This therefore affects some Creative Industry sectors, such as Crafts, more than others due to a predominance of small businesses. For more information on the IDBR see ONS website - IDBR

7. **ONS, Labour Force Survey (LFS)**
   The LFS is a quarterly sample survey of households living at private addresses in Great Britain. Its purpose is to provide information on the UK labour market that can then be used to develop, manage, evaluate and report on labour market policies. For more information on the LFS see ONS website - LFS

8. **ONS, International Trade in Services**
   The ONS conducts an inquiry into international transactions of companies offering business services. For more information see ONS website - International Trade. The figures used in this bulletin are specially commissioned from ONS by DCMS.

9. **The Business of Design, Design Council** Link
   This survey was carried out in 2004-05 by the Design Council to provide data on many aspects of the Design industry. The Design Council aims to repeat the survey every three years.

10. **Design Industry Valuation Survey, British Design Innovation**
    This is an annual survey undertaken by British Design Innovation based on over 4,000 BDI registered design agencies. For more information see BDI website

11. **Antiques Trade Gazette**
    The figure for exports used in this bulletin was produced by the Gazette from analysis of HM Revenue and Customs data and covers only UK exports to non-EU countries.