



Creative Industries in North East Scotland

Report for Robert Gordon University

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Executive Summary

Introduction

This report presents the findings of a study into the creative industries in the North East of Scotland (Aberdeen City, Aberdeenshire and Moray). Commissioned by Robert Gordon University, the research examines the economic scale and structure of the creative industries in the region, and identifies opportunities for future development.

The creative industries are a priority sector for the Scottish economy. The sector is broad and diverse, and the Scottish Government's official definition includes the following sub-sectors:

1. advertising
2. architecture
3. visual arts
4. crafts and antiques
5. fashion and textiles
6. design
7. performing arts
8. music
9. photography
10. film and video
11. computer games
12. radio and TV
13. writing and publishing
14. libraries and archives
15. software/ electronic publishing
16. cultural education

Creative Industries in the North East of Scotland

The creative industries in the North East of Scotland employ **6,000** people in just over **1,550 businesses**. This equates to 9% of total employment in the creative industries in Scotland and 13% of the total number of creative industries businesses, suggesting smaller average business size in the North East.

The sector generates annual revenues in excess of **£600m**, and GVA of almost **£373m**. Productivity is high compared to the rest of Scotland. Aberdeen City accounts for more than two thirds of the jobs in the sector and a similar proportion of annual revenues.

Like the creative industries across Scotland and much of the UK, the recession has been challenging for the sector in the North East, and overall employment fell between 2009 and 2011, albeit at a rate slightly lower than for Scotland as a whole (14% compared to 17%).

However, the same period has seen an increase in the numbers of creative industries businesses in the region as well as growth in revenues and GVA, suggesting both a degree of fragmentation and start-up and possible efficacy gains. GVA per head has also increased while it has reduced at national level.

The sector has a somewhat different character and structure to that seen elsewhere in Scotland. While Glasgow has broadcasting, Dundee is strong in digital media and Edinburgh is creative services driven, the North East appears to be strong in **design** – architecture, design and fashion are all important components of the local creative economy, as is visual art and to some extent advertising.

Although the sector is mainly concentrated in Aberdeen City, Aberdeenshire has some activity in design, fashion and textiles, software and architecture, and generates in excess of £100m in annual GVA. Moray is the weakest of the three areas, and appears to be concentrated on lower value ends of the creative industries spectrum.

The arts sector in the region is strong at the grass roots end (particularly in Aberdeenshire), but less so the higher up the scale it goes. There is no producing theatre, and no signature events or assets, although the revitalised art gallery might provide an opportunity to address this. This not only impacts on the region's cultural offer but also its offer to visitors.

High costs and lack of regular work opportunities contribute to the region's difficulties in retaining creative talent and while there is a reportedly strong creative services sector focussed on the energy industry, this has a low level of public visibility.

Future Development

Looking at Aberdeen's typical benchmark regions (Houston, Stavanger, Calgary and Perth) it is striking that all four have invested in the creative and cultural sector driven both by a need for economic diversification and to improve the overall quality of life offer for residents and visitors. There is an opportunity or the North East of Scotland to do likewise.

The study identified a clear need for leadership for the sector and to articulate a vision for its future. These are both lacking at present, but there are three broad themes that may now prove useful to consider:

- the cultural offer of the region contributes to the overall **quality of life** that it offers, which is in turn a key part of its appeal to internationally mobile talent. It can also help retain homegrown talent if there is sufficient opportunity;

- culture and the creative industries can help **regenerate** the region both through the application of design and creativity (areas in which the region has some strength) and through the clustering effect that brings vibrancy and kick starts economic activity; and
- there are creative businesses in the region that are clearly doing well, and there will be opportunities to continue to develop their **competitiveness** through the right kinds of support. There is also potential to encourage a more vibrant start-up culture taking the creativity and technological expertise coming through the region's universities and colleges.

The creative and cultural sector is not a panacea for future economic diversification, improved quality of life or a vibrant visitor economy. But it certainly has a role to play, and that role will be significantly enhanced by a clear and shared vision, and effective engagement across the region. That is both the opportunity and the challenge for the North East.

1. Introduction

This report presents the findings of a study into the creative and cultural industries in the North East of Scotland. Commissioned by Robert Gordon University, the research is intended to examine in some detail the economic scale and structure of the creative industries in the region, and will inform ongoing debates about the future. As such, the report presents a detailed statistical analysis of the sector, placing this within the wider context of the Aberdeen City and Shire region, and drawing wider comparisons with energy-rich cities elsewhere.

1.1 Study Objectives

The study is required to provide detailed information on:

- the economic scale and structure of the creative and cultural industries in North East Scotland;
- meaningful comparisons with relevant national and international cities and regions;
- best practice in creative and cultural industries development beyond capital and physical infrastructure work; and
- options for the promotion of future growth in the sector, both economic and reputational.

1.2 Study Method

The study method consisted of the following elements:

- **Stage 1:** which comprised an initial inception meeting setting out the scope of the study and the agreed method. This was followed by preparation of two working papers – one on data analysis methodologies and one on possible case study analyses – which were presented and discussed at a subsequent meeting of the Study Steering Group;
- **Stage 2:** focussed on desk based analysis of existing economic data on the creative and cultural industries in the North East of Scotland and an agreed range of comparator geographies. During this stage, the study team also reviewed the development of the creative and cultural sector in four case

studies cities/ regions agreed with the Steering Group – Stavanger (Norway); Perth (Australia); Calgary (Canada) and Houston (USA) – and developed the interview proformas for use in Stage 3;

- **Stage 3:** consultation with a range of stakeholders with an interest/ role in the creative and cultural industries in North East Scotland; and
- **Stage 4:** development of a draft report for presentation and discussion with the Study Steering Group and production of the final study outputs. Structure of the Report

1.3

Report Structure

The remainder of the report is set out as follows:

- **Chapter 2** outlines the context for the study by providing background on the North East of Scotland and the creative and cultural industries;
- **Chapter 3** presents a detailed analysis of official economic data describing the scale and structure of the creative industries in the region, and drawing comparison with agreed benchmark regions;
- **Chapter 4** provides a more qualitative assessment of the issues facing the sector, drawing on the consultation feedback, and discusses the lessons to emerge from the analysis of the four international case studies; and
- **Chapter 5** sets out the study conclusions and identifies opportunities for future development.

2. North East Scotland

2.1

Introduction

For the purposes of the current study, the North East of Scotland has been defined as those areas covered by the local authority areas of Aberdeen City, Aberdeenshire and Moray Councils.

The region is geographically and economically diverse, and is home to 11% of Scotland population. The combined population of the region in 2012 was 593,420, broken down as shown in **Table 2.1**, below.

Table 2.1: Population of North East Scotland (2012)

Aberdeen City	244,970
Aberdeenshire	255,540
Moray	92,910
North East of Scotland	593,420
Scotland	5,313,600
North East as % of Scotland	11%

Source: National Records of Scotland 2013

Aberdeen is the urban heart of the region, but remains a small city by UK or even Scottish standards. The remainder of the North East is largely rural with few settlements of scale.

2.2

Economy

The economy of the North East is heavily dominated by the energy industry in Aberdeen and the surrounding area. The discovery of oil and gas in the North Sea in the 1970s led to the rapid growth of an internationally significant energy sector in and around Aberdeen, which has continued to provide a degree of economic stability for the Aberdeen City and Shire region ever since. Indeed, Aberdeen was one of the few cities in the UK to weather the economic recession, and remains one of its most economically stable regions¹.

¹ Centre for Cities Outlook 2013.

However, there is growing recognition of the need to start planning for a future in which the supply of oil and gas in the North Sea diminishes. Priorities in this respect relate to the internationalisation of the energy supply chain, building a competitive future based less on natural resources and more on technology, know-how and expertise. This is a dominant theme in economic strategy for the Aberdeen City and Shire region.

In addition to energy, the region also has strengths in food and drink and tourism as well as developing interests in life sciences and creative industries. The more rural parts of the region face a familiar set of challenges relating to dispersed populations and high levels of outmigration. The rich and diverse natural environment provides a solid basis for the region's tourism offer, but the sector continues to underperform, and in Aberdeen City at least it remains highly dependent on the migrant labour serving the oil and gas industry. Elsewhere in the North East, tourism facilities are underdeveloped and the region is not capturing as much from the visitor economy as it might, given the appeal of its geography (including access to the Cairngorms National Park) and assets like Speyside whisky.

These and other issues are identified in strategic guidance for economic development across the region. For Aberdeen City and Shire, the Economic Action Plan is the responsibility of ACSEF (Aberdeen City and Shire Economic Future) – an influential group of private and public sector representatives supported by the two Councils and Scottish Enterprise.

ACSEF's most recent economic plan identifies a range of priority sectors and actions². It recognises the region's strong economic performance, and the central role of the energy sector, while also guarding against complacency and encouraging greater diversification in the region's economic offer. In particular, the plan highlights opportunities in food and drink, tourism and life sciences, while also identifying the creative industries as a potential area of growth.

Much of the ACSEF action plan is focussed on developing the economic and transport infrastructure that will support the ongoing growth of the energy sector, and these are also the areas that are most developed within the plan. That is not to say that other sectors are ignored, but rather that priorities are less clearly defined. Indeed, one of the identified actions is to develop a strategy for the creative industries, and ACSEF has been clear that greater understanding of the sector and the opportunities that it offers is urgently required.

² *Building on Success: The Economic Action Plan for Aberdeen City and Shire 2013-2018* (ACSEF, 2013)

The Action Plan also places some emphasis on the region's quality of life offer both as part of the offer to visitors but also to continue to ensure the attraction of the kind of talent that will support ongoing growth. This is a particular challenge for the energy sector in which Aberdeen faces global competition from other centres of the world energy industry such as Norway, Australia and the US.

Economic priorities for Moray are not within ACSEF's remit, but are defined within the Moray Economic developed by the Moray Community Planning Partnership. Some of the opportunities identified for Moray include world leading brands in food and drink, the natural assets of the region and potential in areas like renewable energy and tourism.

The Strategy also places some emphasis on the need to develop Elgin as the economic heart of the area, and identifies actions to develop innovation, education and health, leisure and the arts and the tourism offer.

Summary

The North East is in many ways a challenging region for analysis. It is mainly rural, and faces all of the expected difficulties of low wage employment, outmigration and geographic dispersion. However, much of the regional economy, at least in Aberdeen City and Shire, is driven by the global success of the energy sector, a success that has supported consistently strong economic performance in the region, even through the worst of the recent recession.

While this is an enviable position, it may also have had the unintended consequence of encouraging a degree of comfort amongst policy makers. As concern now begins to mount about the long term availability of oil and gas in the North Sea, the time is right to consider the diversification of the regional economy as well as the ongoing competitiveness of the energy sector itself. Effort on both fronts is now required, a fact that is clearly recognised in economic strategies across the region.

2.3

What are the

Creative Industries?

Terms such as the creative industries, creative economy and cultural industries are widely used in policy circles yet are often poorly defined. A wide range of definitions have been proposed based on different conceptual frameworks and while it is beyond the scope of this work to dwell too long on the nuances of these definitions, it is important to set clear terms of reference.

Although a wide range of possible approaches to the definition and measurement of the creative industries are available, there are good reasons to consider a method that has some degree of official status as well as wide recognition. For this reason, the study has adopted the definition used by the Scottish Government.

The Scottish Government has been taking a different approach to that of the UK Government and adopts a different definition for the creative industries (although there are similarities to the previous UK method). The Scottish Government definition identifies 16 sub-sectors, as follows:

- | | |
|--------------------------|-------------------------------------|
| 17. advertising | 25. photography |
| 18. architecture | 26. film and video |
| 19. visual arts | 27. computer games |
| 20. crafts and antiques | 28. radio and TV |
| 21. fashion and textiles | 29. writing and publishing |
| 22. design | 30. libraries and archives |
| 23. performing arts | 31. software/ electronic publishing |
| 24. music | 32. cultural education |

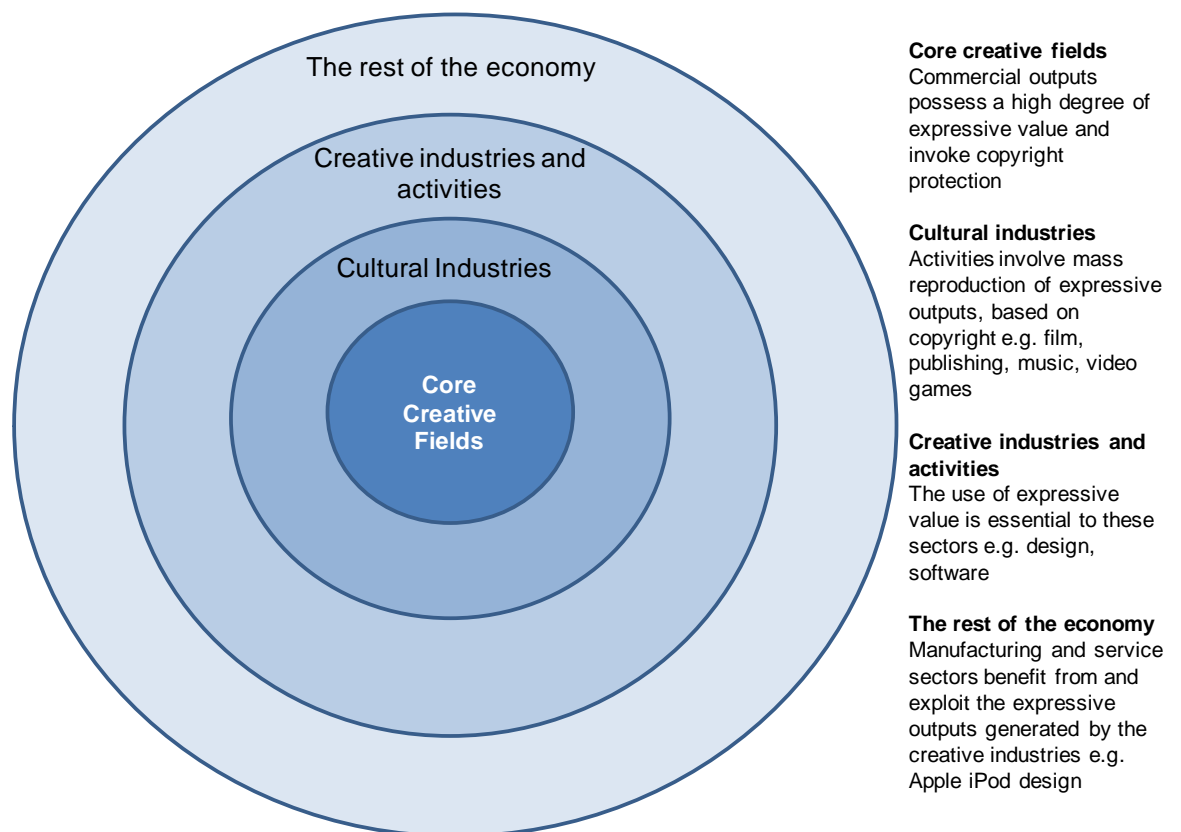
As shown, this definition encompasses what would traditionally be understood as the arts – performing and visual arts, parts of the music sector and, arguably, crafts – as well as what would generally be recognised as more commercial activities such as broadcasting, software development and design.

One of the most debated issues is the extent to which these sub-sectors represent a truly coherent set of industries, or are, in fact, more different than they are similar. This is of more than intellectual interest alone – how we conceptualise the creative industries has important implications for effective policy and implementation.

A widely held view, articulated by Professor David Throsby (Throsby, 2001) and later adopted and developed by the Work Foundation (2007), is that the creative industries share a common focus on the origination and subsequent commercialisation of “expressive value”. In other words, the outputs of the creative industries contribute new knowledge, experiences and meaning.

This insight led the Work Foundation to develop a ‘stylised typology’ of the creative industries based on the idea of expressive value at the core, and radiating out through a series of concentric circles loosely based on a model proposed by KEA European Affairs in a report on the cultural economy for the European Commission (2006) (Figure 2.1).

Figure 2.1: Stylised Typology of the Creative Industries (Work Foundation, 2007)



Source: *Staying Ahead: the economic performance of the UK's creative industries*, the Work Foundation, 2007

Although this is only one of many different ways of conceptualising the creative industries, it is useful in that it highlights two important issues:

- the development and exploitation of creative content (and copyright) lie at the heart of creative industries business models; and
- the creative industries do not sit in isolation from the rest of the economy. Many creative sub-sectors such as advertising, architecture, design and software are primarily involved in business-to-business transactions, and the outputs of creative sectors find application across the economy. In fact, 55% of creative products are purchased by other businesses (Work Foundation, 2007).

Regardless of how compelling this model is considered to be, it risks obscuring the fact that the identified sub-sectors in quite different ways within often distinct and, in some cases well established, supply chains and markets. While business models may share some common ground in content and copyright, there are other differences that highlight specific industry conditions. For example, the primary revenue source for broadcasting is advertising, while in computer games it is product sales (and, increasingly, online subscriptions). Large parts of the design industries (e.g. graphics) operate more like professional services companies, while arts organisations typically exist within a mixed economy of public funding and commercial income.

The point here is that the creative industries are complex and it is important to bear in mind the richness of their diversity. As discussed later, this presents both opportunities and challenges.

2.4

Creative

Industries in the North East

The economic snapshot described in Section 2.2 above is the context against which we must view the creative economy of the North East. In contrast to many of the cities and regions that have long prioritised the development of the creative industries, Aberdeen has arguably not faced an urgent need for economic reinvention.

Post-industrial centres such as Glasgow, Manchester and Liverpool faced major economic challenges as a result of the decline in heavy industry (and still do) and prioritised the development of new knowledge based industries such as the creative industries, financial services and life sciences. The strength of the innovation and global competitiveness of the energy sector has meant that the North East has not

faced these challenges. It should therefore be no surprise that the region has not placed the same degree of emphasis on developing other parts of the economy such as the creative industries.

It is also worth noting that while this is almost certainly true in terms of the economic development of the creative industries, there is a longer history of cultural development in the North East. The arts have always played a role in the life of Aberdeen City and Shire and in Moray whether through the international Aberdeen Youth Festival or the concentration of activity in rural centres such as Huntly in Aberdeenshire and Findhorn in Moray.

Most recently Aberdeen launched an ultimately unsuccessful bid for the 2017 UK City of Culture (since awarded to Hull) and has been seen controversial and highly public debates about the development of Union Terrace Gardens in the city centre. It is beyond the scope of this study to examine these developments in any detail, but they do provide important context in a number of ways:

- the Union Terrace Gardens debate is widely perceived as having been divisive, and is unhelpfully characterised as a bitter dispute between the city's business community and the arts sector;
- the City of Culture bid, although unsuccessful, has partly helped to rebuild some relationships through a sense of shared purpose, and has raised the profile of culture within the region; and
- Aberdeen City Council has indicated its intention to continue to implement as least some of the proposed City of Culture programme, an approach that has been taken with some success in other cities (e.g. Newcastle/Gateshead).

We return to these issues later in the report.

3. Creative Industries: Data Analysis

3.1 Introduction

This section provides a detailed analysis of economic data on the Creative and Cultural Industries (CCI) within three main local authority areas:

- Aberdeenshire;
- Aberdeen City; and
- Moray.

Analysis has also been undertaken at a regional 'North East' area (combination of the three local authority areas) and national level for comparable purposes.

CCI has been defined using the Scottish Growth Sector definition (see Chapter 2), and data have been analysed from the following sources:

- Government Economic Strategy Growth Sector Statistics by Local Authority Areas; and
- Government Economic Strategy Growth Sector Statistics.

Information has been analysed for: employment; registered enterprises; total turnover; and GVA per head. It should be noted that different datasets cover different time periods. As a result, we have analysed absolute and percentage changes for the period 2009-11. It should be noted that data for the number of registered enterprises is available from 2010 onwards therefore analysis has been undertaken from 2010-2012.

[Appendix A](#) provides a detailed list of the 2007 SIC Codes that make up the sector. [Table A.1](#) provides the full list and where appropriate the percentage of the SIC Code associated with the CCI. [Table A.2](#) provides the 2007 SIC Code definition of the sixteen categories that more generally encompass the sector.

3.2

Overview

6,000 people work in the CCI in North East Scotland, accounting for 9% of all CCI employment in Scotland, with Aberdeen City accounting for the majority.

All areas have experienced a decline in the number of people employed within the CCI sector since 2009 although some areas have experienced a slight fluctuation or steadying out ([Table 3.1](#)).

Table 3.1: Employment by Local Authority Area (2009-12)

	2009	2010	2011	2012	As a % of Total Scotland	Absolute Change (2009-11)	% Change (2009-11)
Aberdeen City	4,700	5,000	4,000	4,100	6%	-700	-15%
Aberdeenshire	1,700	1,700	1,500	1,400	2%	-200	-12%
Moray	600	600	500	500	1%	-100	-17%
North East	7,000	7,300	6,000	6,000	9%	-1,000	-14%
Scotland	76,000	71,900	64,100	65,200	100%	-11,900	-16%

Source: Government Economic Strategy Growth Sector Statistics by Local Authority Areas

In contrast, the number of registered enterprises within Scotland increased between 2010 and 2012. Aberdeenshire, Aberdeen City and the North East experienced growth over the three year period however the number of enterprises within Moray remained unchanged (Table 3.2).

Table 3.2: Registered Enterprises by Local Authority (2010-12)

	2010	2011	2012	As a % of Total Scotland	Absolute Change (2010-11)	% Change (2010-11)
Aberdeen City	650	685	760	6%	110	17%
Aberdeenshire	605	615	680	6%	75	12%
Moray	115	120	115	1%	0	0%
North East	1,370	1,420	1,555	13%	185	14%
Scotland	11,025	11,495	12,325	100%	1,300	12%

Source: Government Economic Strategy Growth Sector Statistics by Local Authority Areas

The North East accounts for 13% of total Scottish CCI enterprises, with Aberdeenshire and Aberdeen City each contributing 6% to the total area.

Total Turnover

The CCI generate in excess of £600m in annual revenues in the North East of Scotland. Aberdeenshire has experienced particularly strong growth of 24% between the time period of 2009 and 2011. This is significantly larger than the national average of 3% and comparable local authority areas. Although Aberdeenshire has experienced a large increase, the area still account for a small percentage of the national total (3%). [Table 3.3](#) detailed below.

Table 3.3: Total Turnover by Local Authority (2008-11) (£millions)

	2008	2009	2010	2011	As a % of Total Scotland	Absolute Change (2009-11)	% Change (2009-11)
Aberdeen City	289.4	384.2	333.1	405.6	8%	21.4	6%
Aberdeenshire	97.4	137.2	107.2	170.1	3%	32.9	24%
Moray	34.1	41.6	36.2	41.1	1%	-0.5	-1%
North East	420.9	563.0	476.5	616.8	12%	53.8	10%
Scotland	5,295.2	4,843.8	4,788.7	4,998.6	100%	154.8	3%

Source: Government Economic Strategy Growth Sector Statistics by Local Authority Areas

GVA per Head

GVA per head for the three local authority areas as well as the North East has fluctuated throughout the time period of 2008-2011, settling on an increase between 2010 and 2011. All three local authority areas have a GVA per head higher than the national average, ranging from a low of 3% greater, to a high of 33% greater, [Table 3.4](#) details the findings.

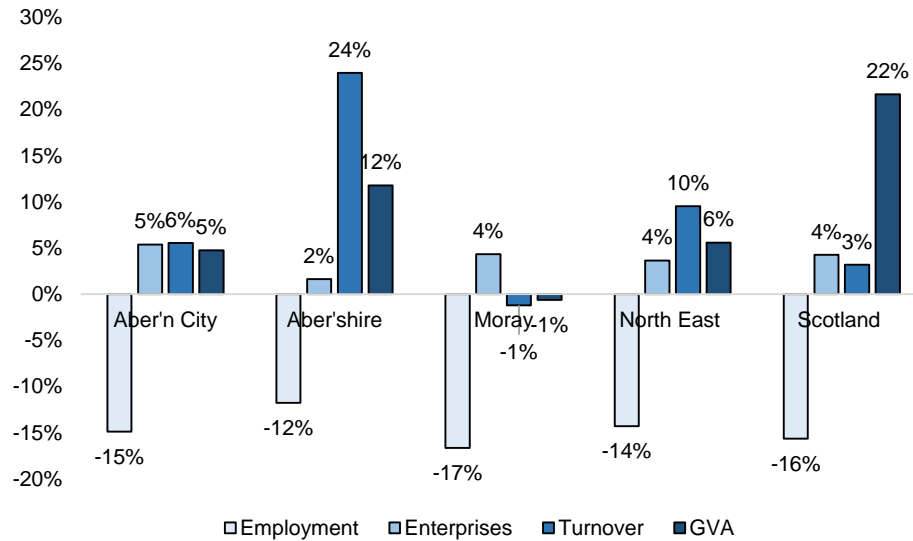
Table 3.4: GVA per Head by Local Authority Area (2008-11) (£)

	2008	2009	2010	2011	Absolute Change (2009-11)	% Change (2009-11)	Comparable with Scotland
Aberdeen City	50,480	59,502	48,169	62,343	2,841	5%	+28%
Aberdeenshire	41,485	58,314	44,761	65,193	6,879	12%	+33%
Moray	42,014	50,476	43,013	50,167	-309	-1%	+3%
North East	44,660	56,097	45,314	59,234	3,137	6%	+21%
Scotland	45,134	40,188	40,959	48,896	8,708	22%	-

Source: Government Economic Strategy Growth Sector Statistics by Local Authority Areas

[Figure 3.5](#), over, provides a summary of the percentage change across all areas of analysis. Most noticeably, employment has experienced a decrease across all locations ranging from -12% to -17%, while the number of enterprises, turnover and GVA per head have increased for four of the five areas, Moray being the exception.

Figure 3.5: % Change (2009-11)³



Source: Government Economic Strategy Growth Sector Statistics by Local Authority Areas

Summary

The headline data suggest that:

- 6,000 people work in the CCI in the North East of Scotland, with more than two thirds of this total in Aberdeen City; and
- the sector generates revenues in excess of £600m and has high levels of productivity compared to the CCI in Scotland and to the national economy as a whole (GVA per head for all industries in Scotland is £56,083)

However, the data also present a challenging picture. Employment in the CCI has been falling at Scottish as well as regional levels. Although the decline in the North East is slightly lower than at national level, this is undoubtedly a result of the wider economic downturn.

This should be unsurprising, as parts of the CCI were hit hard and early by the recession, most obviously business facing sectors such as architecture, design and advertising, but also in areas such as broadcasting and publishing (the latter of which is in long term decline).

³ Number of enterprises is calculated between 2010 and 2011.

The data also suggest some fragmentation as employment has been falling while the numbers of businesses has grown. This again makes intuitive sense as employees leave companies and form their own businesses – a well-established pattern in creative services companies (advertising, design and architecture).

3.3

Detailed Analysis

In order to understand some of these patterns in more detail, it is necessary to review the data at a less aggregated level. In so doing, we must keep in mind some of the data issues that arise. In particular, as the level of disaggregation increases, the reliability and availability of the data decrease. There are two main reasons for this:

- as the data are drawn from surveys, the sample sizes become smaller at lower geographic levels and at the level of sub-sectors of the CCI. As a result, the data become less reliable and robust; and
- if it is judged possible to identify data for individual organisations, then the data are not supplied by the Office for National Statistics. As a result, while data may be included for the CCI as a whole (as the individual categories and codes are aggregated) when disaggregated gaps start to appear. This problem is particularly acute when dealing with financial data.

With these caveats in mind, we have provided analysis of the CCI over the three year period, 2009-2011, focused on the following areas:

- Scotland;
- North East⁴;
- Aberdeen City;
- Aberdeenshire;
- Moray;
- Dundee;
- Glasgow; and
- Edinburgh.

⁴ Defined as Aberdeenshire, Aberdeen City and Moray
Creative and Cultural Industries in North East Scotland

Analysis has been undertaken for the CCI as a whole within each of the areas as well as by subsector, categorised into one of the following 16 sub sectors:

- advertising;
- architecture;
- computer games;
- crafts and antiques;
- cultural education;
- design;
- fashion and textiles;
- film and video;
- libraries and archive;
- music;
- performing arts;
- photography;
- radio and tv;
- software/ electronic publishing;
- visual art; and
- writing and publishing.

Data were sourced from the Office of National Statistics (ONS), specifically:

- Business Registry and Employer Survey (BRES) – Employment;
- Annual Business Inquiry 2 – Business Units, Turnover, Gross Value Added (GVA); and
- UK Business Count – Business Units and Enterprise Units (2011).

3.3.1 Employment

All six of the local authority areas as well as the North East have experienced a decrease in CCI employment ranging from 9% in Glasgow to 25% in Dundee.

Table 3.5: Employment in Creative and Cultural Industries (2009-2011)

	2009	2010	2011	Change	% change
Aberdeen City	4,714	4,964	3,945	-769	-16%
Aberdeenshire	1,712	1,699	1,475	-237	-14%
Moray	636	587	546	-90	-14%
North East	7,073	7,264	5,960	-1113	-16%
Dundee	3,624	3,180	2,713	-911	-25%
Edinburgh	13,770	12,896	10,966	-2804	-20%
Glasgow	18,244	17,079	16,583	-1661	-9%
Scotland	75,376	71,374	63,167	-12209	-16%

Source: BRES

In 2011, CCI accounted for 2.6% of all employment in Scotland, a fall of 0.4 percentage points compared with two years previous (Table 3.6).

In contrast to Scotland, and particularly the comparator cities, the CCI account for a lower overall proportion of employment in all three areas of the North East.

Table 3.6: CCI Share of All Employment (2009-2011)

	2009			2011			CCI % Point Change
	CCI	All industries	CCI %	CCI	All industries	CCI %	
Aberdeen City	4,714	180,248	2.6%	3,945	177,641	2.2%	-0.4%
Aberdeenshire	1,712	93,169	1.8%	1,475	101,552	1.5%	-0.4%
Moray	636	35,671	1.8%	546	35,125	1.6%	-0.2%
North East	7,073	309,091	2.3%	5,960	314,314	1.9%	-0.4%
Dundee	3,624	77,370	4.7%	2,713	74,108	3.7%	-1.0%
Edinburgh	13,770	313,577	4.4%	10,966	302,037	3.6%	-0.8%
Glasgow	18,244	418,218	4.4%	16,583	393,156	4.2%	-0.1%
Scotland	75,376	2,523,054	3.0%	63,167	2,455,964	2.6%	-0.4%

Source: BRES

Sub Sector Employment

Table 3.7, over, details the subsector breakdown for employment in 2011, and the proportion of each subsector as a percent of the CCI in the area.

Software and electronic publishing accounted for the greatest share of employment in six of the eight areas, ranging from a low of 21% for Glasgow to a high of 32% for Edinburgh. In the two other areas - Moray and Dundee - writing and publishing were the largest employers, although it remains an important source of employment in the other areas.

It is also worth noting the scale of employment in design in both Aberdeen City and Aberdeenshire. Closer inspection of the data here reveal that a substantial proportion of this is in technical design, no doubt as an input to the energy sector. This highlights both the importance of the energy sector as a market and the clear link between creative input and the wider economy.

Architecture also appears comparatively important in Aberdeen, although the data here contrast with those reported in previous work for RGU⁵, which identified more than 4,500 people working in architecture. The reason for this discrepancy is a revision to the Standard Industrial Classifications (SIC) in 2007 which provided a finer grained definition of architecture removing technical consultancy activities. The current figure of just less than 350 people working in architecture is therefore a more accurate reflection of the subsector in Aberdeen.

It is also worth issuing a note of caution in relation to the data for music and for computer games. Music is very poorly represented in the SIC and official data on this subsector are highly unreliable. Similarly, codes for computer games are new and still suffer from the misallocation of data into other categories, underestimating the scale of the sector. Having said this, we know of very little in the way of games development work in the North East of Scotland.

[Table 3.8](#), over, details the changes in subsector employment between 2009 and 2011. At a national level, the majority of subsectors have experienced a decrease in employment, with the exceptions of computer games and cultural education (169% and 12% respectively), although absolute numbers here are modest.

Aberdeen City has experienced growth across the highest number of subsectors with employment within crafts and antiques, cultural education, design, radio and TV, and visual art increasing over the three year period. However, there have been marked declines in employment in software, performing arts, architecture and publishing. This pattern is similar in Aberdeenshire and Moray (apart from software in Moray of which there is very little).

Falling employment in software, architecture and publishing are national trends, but performing arts appear to have suffered more in the North East than elsewhere, begging questions as to why this might be the case.

⁵ *Market Assessment for Gray's School of Art* (EKOS, 2010)
Creative and Cultural Industries in North East Scotland

Table 3.7: Sub-Sector Employment (2011)

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%
Advertising	116	3%	18	1%	7	1%	141	2%	31	1%	569	5%	1,926	12%	3,179	5%
Architecture	343	9%	165	11%	70	13%	578	10%	155	6%	1,079	10%	1,357	8%	4,699	7%
Computer games	0	0%	0	0%	0	0%	0	0%	86	3%	288	3%	64	0.4%	486	1%
Crafts and antiques	64	2%	39	3%	34	6%	135	2%	91	3%	120	1%	475	3%	2,125	3%
Cultural education	17	0.4%	4	0.3%	0	0%	21	0.4%	34	1%	94	1%	14	0.1%	582	1%
Design	495	13%	304	21%	19	3%	817	14%	150	6%	850	8%	560	3%	4,223	7%
Fashion and textiles	71	2%	132	9%	107	20%	309	5%	192	7%	129	1%	188	1%	2,712	4%
Film and video	182	5%	11	1%	11	2%	205	3%	105	4%	361	3%	562	3%	2,348	4%
Libraries and archive	183	5%	115	8%	87	16%	385	6%	246	9%	701	6%	297	2%	4,044	6%
Music	4	0.1%	5	0.3%	0	0%	9	0.2%	9	0.3%	30	0.3%	76	0.5%	255	0.4%
Performing arts	235	6%	15	1%	2	0.4%	250	4%	250	9%	780	7%	2,366	14%	4,574	7%
Photography	36	1%	30	2%	5	1%	69	1%	8	0.3%	98	1%	75	0.5%	518	1%
Radio and TV	211	5%	72	5%	27	5%	309	5%	66	2%	187	2%	1,832	11%	3,045	5%
Software/electronic publishing	993	25%	355	24%	56	10%	1,404	24%	292	11%	3,542	32%	3,547	21%	16,965	27%
Visual art	149	4%	30	2%	1	0.3%	179	3%	42	2%	206	2%	244	1%	1,081	2%
Writing and publishing	847	21%	181	12%	121	22%	1,149	19%	958	35%	1,934	18%	3,001	18%	12,331	20%
Total	3,945	100%	1,475	100%	546	100%	5,960	100%	2,713	100%	10,966	100%	16,583	100%	63,167	100%

Source: BRES

Green = largest proportion, Red = lowest proportion

Table 3.8: Sub-Sector Employment Change (2009-2011)

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%
Advertising	-8	-6%	-10	-36%	0	0%	-19	-12%	-22	-42%	-314	-36%	-266	-12%	-1,071	-25%
Architecture	-72	-17%	-15	-8%	-23	-25%	-110	-16%	-58	-27%	-537	-33%	-811	-37%	-1,821	-28%
Computer games	0	0%	0	0%	-1	-100%	-1	-100%	29	51%	266	1209%	54	540%	305	169%
Crafts and antiques	28	79%	-32	-45%	-1	-4%	-17	-11%	-32	-26%	-91	-43%	-92	-16%	-733	-26%
Cultural education	9	113%	1	33%	0	0%	10	91%	15	79%	35	59%	8	133%	62	12%
Design	10	2%	8	3%	4	28%	23	3%	78	109%	-221	-21%	-245	-30%	-605	-13%
Fashion and textiles	-38	-35%	19	17%	6	6%	-13	-4%	-8	-4%	-88	-41%	-117	-38%	-604	-18%
Film and video	-75	-29%	-6	-34%	-3	-21%	-82	-28%	-36	-25%	-179	-33%	-74	-12%	-561	-19%
Libraries and archive	-117	-39%	-35	-23%	-9	-9%	-161	-29%	-13	-5%	-65	-8%	27	10%	-543	-12%
Music	-1	-20%	-2	-29%	0	0%	-3	-25%	8	800%	-24	-44%	-5	-6%	-67	-21%
Performing arts	-115	-33%	-10	-40%	-19	-90%	-147	-37%	-1	0%	-193	-20%	-82	-3%	-445	-9%
Photography	-71	-66%	-21	-41%	0	0%	-94	-58%	-5	-38%	-28	-22%	-67	-47%	-388	-43%
Radio and TV	12	6%	-6	-8%	16	145%	21	7%	-1	-1%	-51	-21%	-241	-12%	-211	-6%
Software/electronic publishing	-245	-20%	-124	-26%	-20	-26%	-389	-22%	-456	-61%	-966	-21%	572	19%	-3,208	-16%
Visual art	31	26%	-6	-17%	-1	-50%	22	14%	-1	-2%	-51	-20%	-36	-13%	-209	-16%
Writing and publishing	-117	-12%	2	1%	-39	-24%	-153	-12%	-409	-30%	-297	-13%	-287	-9%	-2109	-15%
Total	-769	-16%	-237	-14%	-90	-14%	-1,113	-16%	-911	-25%	-2,804	-20%	-1,661	-9%	-12,209	-16%

Source: BRES Green= increase, Orange = no change, Red = decrease

Self-employment data is only available at the national level and is taken from the number of registered enterprises that report having zero employees. Although this tells us little about the picture in the North East, the trend is clear – more people within the economy as a whole, and within the CCI in particular, are choosing self-employment.

Again this is consistent with an economy under pressure, as self –employment can be read as a defensive strategy in response to rising unemployment as well as a more positive entrepreneurial interpretation.

Table 3.9: Number of Registered Enterprises with Zero Employees i.e. Self Employed (2008-12)

	2009	2010	2011	2012	Change 2009-11	% Change 2009-11
Advertising	285	295	340	355	55	19%
Architecture	370	385	410	465	40	11%
Visual Art	315	320	315	305	0	0%
Crafts and Antiques	135	125	130	125	-5	-4%
Fashion and Textiles	145	155	150	155	5	3%
Design	820	900	935	1,010	115	14%
Performing Arts	175	215	220	235	45	26%
Music	75	80	70	85	-5	-7%
Photography	240	230	220	210	-20	-8%
Film and Video	150	165	155	145	5	3%
Computer Games	5	5	25	30	20	400%
Radio and TV	185	190	195	185	10	5%
Writing and Publishing	545	530	490	475	-55	-10%
Libraries and Archives	5	5	5	5	0	0%
Software/Electronic Publishing	2,570	2,560	2,945	3,235	375	15%
Cultural Education	15	10	5	10	-10	-67%
Scotland (all industries)	56,540	55,880	56,890	57,305	350	1%

Source: Government Economic Strategy Growth Sector Statistics

3.3.2 Business Stock

Table 3.10 below details an increase in business units across all areas between 2009 and 2011 with the exception of Dundee (-1% decrease).

Table 3.10: CCI Business Units (2009-2011)

	2009	2011	Change	% Change
Aberdeen City	602	699	97	16%
Aberdeenshire	596	691	95	16%
Moray	59	65	6	10%
North East	1,331	1,626	295	16%
Dundee	219	217	-2	-1%
Edinburgh	2,275	2,602	327	14%
Glasgow	1,914	2,124	210	11%
Scotland	11,938	13,404	1,466	12%

Source: ABI2

Based on 16 Groupings categorisation of CCI – see appendix A for more details

Again, as with the employment data, business units data has been analysed by the sixteen subsectors (Table 3.11, over). Software and electronic publishing again accounts for the largest proportion of CCI business units in six of the eight areas. However, design accounts for the largest proportion of business units within Aberdeen City and the North East. It should also be noted that design accounts for an equal share of business units with software and electronic publishing within Aberdeenshire (30.1% each). Comparing this with the employment data suggest that design businesses in the North East are very small (on average less than two employees per business).

In contrast, cultural education accounts for the smallest proportion of business units within half of the areas, with no activity reported in Moray. Given the mainly public sector focus of cultural education this is unsurprising.

Table 3.12, over, details the change in business units over the two year period, 2009-11. As shown, this dataset has many gaps due to data being judged as disclosive.

As detailed above in [Table 3.10](#), the number of CCI businesses in the North East of Scotland increased by 295 between 2009 and 2011, at the same time as employment reduced by more than 1,100 jobs.

Half of the CCI subsectors in the North East increased in business numbers, with architectural activities experiencing the highest percentage increase (20.1%) over the two year period.

However, the largest increase in the North East in absolute terms has been in design. In fact, more than half of the growth in design businesses in Scotland over this period was in the North East (127 of a total increase of 230).

Despite the fall in employment in fashion and textiles ([Table 3.8](#)), there is also evidence of growth in the numbers of businesses in this subsector in the North East.

While these findings are interesting, it is important to note the caution required with these data. There are many gaps here and the reliability of the data is highly questionable, resulting both in discrepancies with totals and large holes in the analysis.

Table 3.11: Sub-Sector CCI Business Units (2011)

	Aberdeen City		Ab' shire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%	Nos	%
Advertising	27	3.9%	*		*		49	3.0%	12	5.5%	151	5.8%	143	6.7%	655	4.9%
Architectural activities	95	13.6%	80	11.6%	17	26.2%	192	11.8%	23	10.6%	195	7.5%	167	7.9%	1,061	7.9%
Computer Games	0	0.0%	0	0.0%	*		*		*		17	0.7%	16	0.8%	60	0.4%
Crafts and Antiques	8	1.1%	13	1.9%	5	7.7%	26	1.6%	6	2.8%	36	1.4%	52	2.4%	341	2.5%
Cultural education	*		*		0	0.0%	*		*		6	0.2%	6	0.3%	40	0.3%
Design	267	38.2%	208	30.1%	11	16.9%	486	29.9%	24	11.1%	209	8.0%	199	9.4%	1,702	12.7%
Fashion and Textiles	*		90	13.0%	*		180	11.1%	27	12.4%	214	8.2%	194	9.1%	1,381	10.3%
Film and Video	10	1.4%	*		*		19	1.2%	*		49	1.9%	78	3.7%	252	1.9%
Library and archive activities	*		*		0	0.0%	*		*		9	0.3%	24	1.1%	60	0.4%
Music	*		*		*		*		*		17	0.7%	35	1.6%	130	1.0%
Performing Arts	*		9	1.3%	*		25	1.5%	8	3.7%	83	3.2%	126	5.9%	478	3.6%
Photography	19	2.7%	*		*		33	2.0%	6	2.8%	63	2.4%	50	2.4%	378	2.8%
Radio and TV	13	1.9%	17	2.5%	0	0.0%	30	1.8%	*		48	1.8%	134	6.3%	362	2.7%
Software/Elec Pub	223	31.9%	208	30.1%	20	30.8%	451	27.7%	70	32.3%	1,193	45.8%	606	28.5%	4,721	35.2%
Visual Art	*		25	3.6%	*		45	2.8%	14	6.5%	129	5.0%	119	5.6%	657	4.9%
Writing & Publishing	37	5.3%	41	5.9%	12	18.5%	90	5.5%	27	12.4%	183	7.0%	175	8.2%	1,126	8.4%
Total	699	100%	691	100%	65	100.0%	1,626	100%	217	100%	2,602	100%	2,124	100%	13,404	100%

Source: ABI2 (* denotes disclosive data)

Green = largest proportion, Red = lowest proportion

Table 3.12: Sub-Sector CCI Business Unit Change (2009-2011)

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	change	%	change	%	change	%	change	%	change	%	change	%	change	%	change	%
Advertising	2	8.0%	*	*	*	*	3	6.5%	2	20.0%	26	20.8%	19	15.3%	83	14.5%
Architectural activities	14	17.3%	0	0.0%	0	0.0%	33	20.8%	-2	-8.0%	-11	-5.3%	-3	-1.8%	60	6.0%
Computer Games	0	0.0%	*	*	*	*	*	*	*	*	*	*	*	*	46	328.6%
Crafts and Antiques	*	*	*	*	*	*	-2	-7.1%	*	*	-6	-14.3%	7	15.6%	-6	-1.7%
Cultural education	*	*	0	*	0	0.0%	*	*	*	*	0	0.0%	1	20.0%	1	2.6%
Design	81	43.5%	6	3.6%	6	120.0%	127	35.4%	2	9.1%	14	7.2%	31	18.5%	230	15.6%
Fashion and Textiles	*	*	*	*	*	*	26	16.9%	2	8.0%	8	3.9%	8	4.3%	20	1.5%
Film and Video	-4	-28.6%	*	*	*	*	-4	-17.4%	*	*	-20	-29.0%	3	4.0%	-23	-8.4%
Library and archive activities	*	*	0	0.0%	0	0.0%	*	*	*	*	-2	-18.2%	*	*	27	81.8%
Music	*	*	*	*	*	*	*	*	*	*	0	0.0%	0	0.0%	-2	-1.5%
Performing Arts	*	*	*	*	*	*	-2	-7.4%	1	14.3%	1	1.2%	-5	-3.8%	18	3.9%
Photography	-1	-5.0%	*	*	*	*	-1	-2.9%	-2	-25.0%	-12	-16.0%	3	6.4%	-16	-4.1%
Radio and TV	1	8.3%	0	0.0%	0		3	11.1%	*	*	3	6.7%	13	10.7%	2	0.6%
Software/Elec Pub	36	19.3%	1	0.6%	1	5.3%	65	16.8%	-3	-4.1%	334	38.9%	120	24.7%	883	23.0%
Visual Art	*	*	*	*	*	*	-2	-4.3%	2	16.7%	-1	-0.8%	-5	-4.0%	-22	-3.2%
Writing & Publishing	-10	-21.3%	0	0.0%	0	0.0%	-12	-11.8%	-4	-12.9%	-24	-11.6%	-22	-11.2%	-121	-9.7%
Total	97	16.1%	6	1.0%	6	10.2%	221	15.7%	-2	-0.9%	327	14.4%	210	11.0%	1,180	9.7%

Source: ABI2

Green= increase, Orange = no change, Red = decrease

3.3.3 Financial Performance

This section details the financial performance within each area at total and then sub sector level for Turnover and Gross Value Added (GVA).

Turnover

Table 3.13 details total turnover for the CCI between 2009 and 2011. It should be noted that owing to data not being disclosed there is a significant variance in the figures for Dundee, mainly due to Writing and Publishing. As a result, we have presented the data excluding this subsector in 2011, and including it in brackets.

Table 3.13: Total Turnover excluding VAT in CCI (2009-2011) £000s

	2009	2011	Change	% Change
Aberdeen City	376,012	373,695	-2,317	-0.6%
Aberdeenshire	147,767	194,387	46,620	31.5%
Moray	24,822	23,360	-1,462	-5.9%
North East	611,133	685,114	73,981*	12.1%
Dundee	109,370	115,784 (190,030)	6,414 (80,660)	5.8% (73.7%)
Edinburgh	1,092,989	1,033,616	-59,374	-5.4%
Glasgow	1,315,882	1,265,313	-50,569	-3.8%
Scotland	5,685,005	5,833,636	148,631	2.6%

Source: ABI2

* totals do not sum due to disclosure

At this global level, turnover growth in the CCI in the North East has been strong between 2009 and 2011 (12% or £73m). This compares favourably with a fall in revenues elsewhere, and appears to be mainly driven by growth in Aberdeenshire. Again, however, it is important to treat these data with some caution.

Table 3.14 and 3.15 detail the subsector break down of turnover, providing 2009-11 figures and details of changes in performance.

The largest sectors by revenue in the North East are software and electronic publishing, design, architecture and fashion and textiles.

As shown, there has been strong revenue growth in the North East in architecture, visual art, design and fashion and textiles – all sectors, with the exceptions of visual art and design, which have reduced in employment.

Table 3.14: Turnover excluding VAT by Sub Sector (2009-2011) (£000s)

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee City		Edinburgh		Glasgow City		Scotland	
	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011
Advertising	6,288	11,072	*	*	*	*	8,018	13,710	2,543	4,807	145,219	143,994	195,766	173,450	402,624	411,596
Architectural activities	47,512	69,234	21,018	34,334	9,053	10,375	77,583	113,943	10,308	11,309	105,911	100,328	165,288	83,575	456,940	409,848
Computer Games	0	0	0	0	*	*	*	*	*	*	*	17,199	*	7,016	8,044	36,744
Crafts and Antiques	*	1,713	2,993	2,148	*	1,289	5,501	5,149	*	*	8,075	7,545	40,431	31,417	134,237	122,777
Cultural education	*	*	*	*		0	72	*	*	*	2,390	1,011	241	466	7,586	4,404
Design	58,501	88,878	31,349	57,122	883	2,023	90,733	148,024	4,218	6,990	128,490	128,760	70,184	48,047	446,986	503,722
Fashion and Textiles	*	*	21,071	37,640	*	*	72,928	98,580	56,958	65,518	44,566	48,946	67,891	79,887	915,007	1,082,045
Film and Video	17,538	15,608	*	*	*	*	19,042	17,028	7,059	*	25,974	24,766	38,884	33,431	144,646	141,013
Libraries and archive	*	*		*		0	*	*	*	*	514	1,548	*	1,710	1,544	5,860
Music	*	*	*	*	*	*	689	*	*	*	2,115	2,439	3,501	4,673	15,563	19,244
Performing Arts	12,736	*	*	1,142	*	*	14,420	13,278	4,941	2,763	33,955	43,606	63,647	116,051	154,087	215,906
Photography	3,397	2,796	*	*	*	*	5,886	5,485	913	679	8,177	9,180	6,684	6,006	49,577	48,698
Radio and TV	32,655	18,008	4,326	5,592		0	36,981	23,600	*	*	15,736	15,536	120,136	124,969	371,588	212,168
Software/ Elec Pub	137,848	121,202	57,410	40,812	6,118	3,306	201,376	165,321	19,645	21,894	386,450	355,492	263,770	271,696	1,513,898	1,625,877
Visual Art	3,536	*	2,446	3,624	331	*	6,312	17,471	2,784	1,826	62,163	19,071	52,890	44,838	168,037	126,253
Writing & Publishing	55,999	45,184	7,154	11,974	8,438	6,367	71,591	63,524	*	74,246	123,253	114,195	226,570	238,080	894,641	867,480
Total	376,012	373,695	147,767	194,387	24,822	23,360	611,133	685,114	109,370	190,030	1,092,989	1,033,616	1,315,882	1,265,313	5,685,005	5,833,636

Source: ABI2

Table 3.15: Change in Turnover excluding VAT by Subsector (2009-11) £000s

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change	Absolute Change	% Change
Advertising	4,784	76%	*	*	*	*	5,692	71%	2,264	89%	-1,225	-1%	-22,316	-11%	8,972	2%
Architectural activities	21,722	46%	13,316	63%	1,322	15%	36,360	47%	1,000	10%	-5,584	-5%	-81,713	-49%	-47,091	-10%
Visual Art	*	*	1,178	48%	*	*	11,159	177%	-959	-34%	-43,091	-69%	-8,052	-15%	-41,784	-25%
Crafts and Antiques	*	*	-846	-28%	*	*	-352	-6%	*	*	-530	-7%	-9,013	-22%	-11,461	-9%
Fashion and Textiles	*	*	16,569	79%	*	*	25,652	35%	8,559	15%	4,379	10%	11,996	18%	167,038	18%
Design	30,377	52%	25,773	82%	1,141	129%	57,291	63%	2,772	66%	270	0%	-22,136	-32%	56,736	13%
Performing Arts	*	*	*	*	*	*	-1,141	-8%	-2,178	-44%	9,650	28%	52,405	82%	61,820	40%
Music	*	*	*	*	*	*	*	*	*	*	324	15%	1,172	33%	3,682	24%
Photography	-602	-18%	*	*	*	*	-401	-7%	-234	-26%	1,002	12%	-679	-10%	-879	-2%
Film and Video	-1,930	-11%	*	*	*	*	-2,014	-11%	*	*	-1,209	-5%	-5,452	-14%	-3,633	-3%
Computer Games	0	0%	0	0%	*	*	*	*	*	*	*	*	*	*	28,700	357%
Radio and TV	-14,647	-45%	1,266	29%	0	0%	-13,381	-36%	*	*	-201	-1%	4,833	4%	-159,420	-43%
Writing & Publishing	-10,816	-19%	4,820	67%	-2,071	-25%	-8,067	-11%	*	*	-9,058	-7%	11,510	5%	-27,161	-3%
Library and archive activities	*	*	*	*	0	0%	*	*	*	*	1,035	201%	*	*	4,315	279%
Software/Elec Pub	-16,647	-12%	-16,597	-29%	-2,812	-46%	-36,056	-18%	2,248	11%	-30,958	-8%	7,925	3%	111,979	7%
Cultural education	*	*	*	*	0	0	*	*	*	*	-1,378	-58%	225	93%	-3,182	-42%
Total	-2,317	-1%	46,620	32%	-1,462	-6%	73,981	12%	80,660	74%	-59,374	-5%	-50,569	-4%	148,631	3%

Source: ABI2

Green= increase, Orange = no change, Red = decrease

Turnover by Employment

Turnover per CCI employee is higher across the North East than in Scotland as a whole, and has grown more strongly over the period 2009-2011. Moray is a clear exception here where turnover per employee is substantially lower than the national average and lower than all of the comparator areas.

Table 3.16: Total Turnover (excluding VAT) by Employee (2009-2011) £

	2009	2011	Change	% Change
Aberdeen City	79,765	94,726	14,961	19%
Aberdeenshire	86,313	131,788	45,475	53%
Moray	39,028	42,784	3,756	10%
North East	86,538	114,952	28,414	33%
Dundee	30,179	65,889 (70,044)	35,710 (39,865)	118% (132%)
Edinburgh	79,716	94,256	14,540	18%
Glasgow	72,151	76,302	4,151	6%
Scotland	75,946	92,353	16,407	22%

Source: ABI2 and BRES

Information in brackets include writing and publishing data previously excluded as it significantly varied the results in previous turnover analysis. Table X.X.

Table 3.17 over provides a subsector breakdown of turnover per employee in 2011. Although there are major gaps in the data, fashion and textiles, architecture, design and software are all above CCI averages for turnover per employee. Visual art is also high, particularly in Aberdeenshire.

Table 3.17: Turnover (excluding VAT) per Employee at CCI Subsector Level (2011) £

	Aberdeen City	Aberdeenshire	Moray	North East	Dundee	Edinburgh	Glasgow	Scotland
Advertising	95,450	*	*	97,237	155,063	253,065	90,057	129,473
Architecture	201,849	208,084	148,215	197,133	72,959	92,982	61,588	87,220
Computer games	0	0	*	*	*	59,720	109,617	75,605
Crafts and antiques	26,760	55,071	37,899	38,141	*	62,879	66,142	57,777
Cultural education	*	*	*	*	*	10,758	33,293	7,567
Design	179,552	187,901	106,493	181,179	46,598	151,483	85,798	11,9281
Fashion and textiles	*	285,152	*	319,029	341,238	379,423	424,932	398,984
Film and video	*	*	*	83,064	*	68,603	59,486	60,057
Libraries and archive	*	*	*	*	*	2,209	5,758	1,449
Music	*	*	*	*	*	81,292	61,489	75,469
Performing arts	*	76,108	*	53,113	*	55,905	49,050	47,203
Photography	77,657	*	*	79,497	*	93,668	80,076	94,011
Radio and TV	85,348	77,666	0	76,376	*	83,078	68,214	69,677
Software/electronic publishing	*	114,964	59,041	117,750	*	100,365	76,599	95,837
Visual art	*	120,785	*	97,602	43,469	92,579	183,762	116,793
Writing and publishing	*	66,154	52,620	55,287	*	59,046	79,334	70,350
Total	94,726	131,788	42,784	114,952	70,044	94,256	76,302	92,353

Source: ABI2

3.4 Gross Value Added

Table 3.18 below provides analysis on the total average GVA for the areas of analysis. It should be noted that a high proportion of subsector data could not be disclosed for confidentiality reasons therefore figures in the table are to be viewed with caution.

Table 3.18: Total Average GVA in CCI (2009-2011) £000s

	2009	2011	Absolute Change	% Change
Aberdeen City	227,847	215,793	-12,054	-5%
Aberdeenshire	96,849	100,738	3,889	4%
Moray	16,926	12,482	-4,444	-26%
North East	368,792	372,838	4,046	1%
Dundee	76,678	89,280	12,602	16%
Edinburgh	587,845	594,584	6,739	1%
Glasgow	695,241	651,705	-43,536	-6%
Scotland	2,519,233	2,990,000	470,767	19%

Source: ABI2

Three local authority areas experienced a decline in total CCI GVA between 2009 and 2011, with Moray experiencing a fall of more than 25%. In contrast, CCI GVA grew in Scotland as a whole, with the only local authority area to experience a similar level being Dundee (c.16%). Tables 3.19 and 3.20 provide the subsector break down of GVA between 2009 and 2011 as well as the recorded absolute, and percentage, changes.

Of the data that can be reported, Edinburgh and Aberdeenshire have experienced the greatest number of CCI subsectors reporting an increase in GVA over the three year period (7 and 6 subsectors respectively), similar to the number of national subsectors.

Table 3.19: Average GVA by Sub-Sector (2009-11) £000s

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow		Scotland	
	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011	2009	2011
Advertising	4,001	7,507	*	*	*	*	5,100	8,950	1,560	3,073	42,047	39,927	124,514	109,457	200,077	198,697
Architectural activities	27,269	29,215	12,091	14,546	5,095	4,369	44,456	48,129	7,068	8,207	72,588	72,854	120,211	54,050	311,910	252,799
Computer Games	0	0	0	0	*	*	*	*	*	*	*	14,194	*	4,412	5,375	27,516
Crafts and Antiques	*	625	1,290	759	*	521	2,388	1,905	*	1,744	3,358	2,929	17,563	10,421	60,712	48,217
Cultural education	*	*	*	*		0	41	*	*	*	1,418	642	137	319	2,853	*
Design	34,486	38,885	17,686	25,330	505	905	52,678	65,121	2,556	4,450	52,737	67,757	42,493	29,280	249,392	282,401
Fashion and Textiles	*	*	8,652	15,882	*	*	33,043	44,587	12,298	21,729	17,520	24,237	24,750	33,310	311,307	425,258
Film and Video	9,680	9,253	*	*	*	*	10,542	10,359	2,989	*	10,856	14,400	18,391	20,415	67,862	79,813
Library and archive activities	*	*		*		0	*	*	*	*	-5,095	-5,734	*	*	-5,284	-4,859
Music	*	*	*	*	*	*	380	*	*	*	1,161	1,667	1,849	2,970	8,233	11,767
Performing Arts	3,985	*	*	696	*	*	5,044	4,020	2,528	742	21,269	24,084	20,716	88,368	71,974	139,772
Photography	1,998	1,766	*	*	*	*	3,399	3,397	528	413	4,574	5,577	3,783	3,656	28,074	29,631
Radio and TV	*	8,859	3,163	3,979		0	*	12,839	*	*	*	7,460	*	*	-359,452	*
Software/Elec Pub	112,867	93,186	48,345	31,826	5,120	2,574	166,332	127,586	11,004	15,677	265,611	245,040	172,305	159,647	1,011,379	1,004,705
Visual Art	2,654	*	1,110	1,435	209	*	3,972	9,051	770	672	18,817	9,744	24,111	18,130	69,352	60,347
Writing & Publishing	30,906	26,497	4,513	6,286	5,997	4,113	41,416	36,895	35,378	32,573	80,983	69,805	124,418	117,271	485,470	433,937
Total	227,847	215,793	96,849	100,738	16,926	12,482	368,792	372,838	76,678	89,280	587,845	594,584	695,241	651,705	2,519,233	2,990,000

Source: ABI2

Table 3.20: Change in GVA by Sub-Sector (2009-11) £000s

	Aberdeen City		Aberdeenshire		Moray		North East		Dundee		Edinburgh		Glasgow City		Scotland	
	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change	Ab Change	% Change
Advertising	3,505	88%	*	*	*	*	3,850	75%	1,513	97%	-2,120	-5%	-15,057	-12%	-1,380	-1%
Architectural activities	1,946	7%	2,455	20%	-726	-14%	3,674	8%	1,138	16%	266	0.4%	-66,161	-55%	-59,111	-19%
Computer Games	0	0%	0	0%	*	*	*	*	*	*	*	*	*	*	22,141	412%
Crafts and Antiques	*	*	-532	-41%	*	*	-483	-20%	*	*	-430	-13%	-7,143	-41%	-12,495	-21%
Cultural education	*	*	*	*	0	0%	*	*	*	*	-776	-55%	181	132%	*	*
Cultural education	*	*	*	*	0	0%	*	*	*	*	-776	-55%	181	132%	*	*
Design	4,399	13%	7,644	43%	400	79%	12,443	24%	1,894	74%	15,020	28%	-13,213	-31%	33,009	13%
Fashion and Textiles	*	*	7,230	84%	*	*	11,544	35%	9,431	77%	6,717	38%	8,560	35%	113,951	37%
Film and Video	-427	-4%	*	*	*	*	-184	-2%	*	*	3,545	33%	2,024	11%	11,951	18%
Library and archive activities	*	*	*	*	0	0%	*	*	*	*	-639	13%	*	*	425	-8%
Music	*	*	*	*	*	*	*	*	*	*	506	44%	1,121	61%	3,534	43%
Performing Arts	*	*	*	*	*	*	-1,023	-20%	-1,786	-71%	2,814	13%	67,652	327%	67,797	94%
Photography	-232	-12%	*	*	*	*	-3	-0.1%	-114	-22%	1,003	22%	-126	-3%	1,556	6%
Radio and TV	*	*	817	26%	0	0%	*	*	*	*	*	*	*	*	*	*
Software/Elec Pub	-19,682	-17%	-16,519	-34%	-2,546	-50%	-38,746	-23%	4,673	42%	-20,571	-8%	-12,658	-7%	-6,675	-1%
Writing & Publishing	-4,410	-14%	1,774	39%	-1,884	-31%	-4,521	-11%	-2,805	-8%	-11,178	-14%	-7,147	-6%	-51,533	-11%
Visual Art	*	*	325	29%	*	*	5,079	128%	-97	-13%	-9,073	-48%	-5,981	-25%	-9,005	-13%

Total	-12,055	-5%	3,888	4%	-4,444	-26%	4,046	1%	12,602	16%	6,739	1%	-43,536	-6%	470,766	19%
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Source: ABI2

Green= increase, Orange = no change, Red = decrease

All of the comparator areas, with the exception of Moray, experienced an increase in GVA per employee, with the largest increase in Dundee (56%).

Table 3.21: Average GVA per Employee (2009-11)

	2009	2011	Change	% Change
Aberdeen City	48,334	54,700	6,366	13%
Aberdeenshire	56,571	68,297	11,726	21%
Moray	26,613	22,861	-3,752	-14%
North East	52,222	62,557	10,335	20%
Dundee	21,159	32,908	11,749	56%
Edinburgh	42,874	54,221	11,347	26%
Glasgow	38,120	39,300	1,180	3%
Scotland	33,654	47,335	13,681	41%

Source: ABI2 and BRES

Table 3.22, over, provides a further subsector break down of GVA per employee in 2011. Although caution is again required given the patchy nature of the data, the analysis again confirms the high value add of fashion and textiles, software and architecture and design in the North East of Scotland.

Table 3.22: Average GVA per Employment (Subsector) 2011

	Aberdeen City	Aberdeenshire	Moray	North East	Dundee	Edinburgh	Glasgow	Scotland
Advertising	64,712	*	*	63,472	99,139	70,171	56,831	62,503
Architecture	85,174	88,157	62,411	83,269	52,946	67,520	39,830	53,799
Computer games	0	0	*	*	*	49,286	68,935	56,617
Crafts and antiques	9,770	19,450	15,325	14,110	*	24,407	21,938	22,690
Cultural education	*	*	*	*	*	6,833	22,756	*
Design	78,556	83,322	47,656	79,707	29,666	79,714	52,286	66,872
Fashion and textiles	*	120,317	*	144,295	113,174	187,886	177,178	156,806
Film and video	*	*	*	50,529	*	39,890	36,326	33,992
Libraries and archive	*	*	*	*	*	-8,179	*	-1,202
Music	*	*	*	*	*	55,556	39,076	46,145
Performing arts	*	46,381	*	16,080	*	30,876	37,349	30,558
Photography	49,049	*	*	49,232	*	56,907	48,750	57,202
Radio and TV	41,987	55,269	0	41,549	*	39,891	*	*
Software/electronic publishing	*	89,650	45,968	90,873	*	69,181	45,009	59,222
Visual art	*	47,826	*	50,564	16,007	47,301	74,304	55,825
Writing and publishing	*	34,730	33,989	32,111	34,001	36,094	39,077	35,191
Total	54,700	68,297	22,861	62,557	32,908	54,221	39,300	47,335

Source: ABI2 and BRES

3.5

Summary

The data presented above are both complex and problematic given the issues with coverage of the various CCI subsector and challenges with disclosive data.

However, some broad conclusions can be drawn:

- although the CCI in North East Scotland have faced the same economic pressures as elsewhere, they have not been disproportionately affected;
- the sector has a somewhat different character and structure to that seen elsewhere in Scotland. Software is important everywhere and publishing is in long term decline in every part of Scotland (and arguably the UK and internationally). While Glasgow has broadcasting, Dundee is strong in digital media and Edinburgh is creative services driven, the North East appears to be strong in design – architecture, design and fashion are all important components of the local creative economy, as is visual art and to some extent advertising. By contrast, performing arts, film and video and photography have all been struggling, and there is little in the way of competitive advantage in radio and TV;
- the greatest pressure has been on employment, with revenues in key subsectors holding up and even improving through the worst of the downturn suggesting a focus on high value add and a degree of resilience;
- although the sector is mainly concentrated in Aberdeen City, Aberdeenshire has some activity in design, fashion and textiles, software and architecture, and generates in excess of £100m in annual GVA, just less than half the total GVA of Aberdeen City's CCI; and
- Moray is the weakest of the three areas, and appears to be concentrated on lower value ends of the CCI spectrum, although data issues have constrained more thorough assessment.

By way of a summarised picture, the four tables that follow present the key data for each CCI subsector in each of the three local authority areas (Aberdeen City, Aberdeenshire and Moray) and for the North East as a whole. The colour coding indicates whether or not there has been growth (green) or decline (red) in that measure between 2009 and 2011. No colour indicates insufficient data to permit such analysis.

CCI Summary: Aberdeen City

	Employment	Business stock	Turnover (£000s)	GVA (£000s)
Advertising	116	27	11,072	7,507
Architecture	343	95	69,234	29,215
Computer games	*	*	*	*
Crafts and antiques	64	8	1,713	625
Cultural education	17	*	*	*
Design	495	267	88,878	38,885
Fashion and textiles	71	*	*	*
Film and video	182	10	15,608	9,253
Libraries and archive	183	*	*	*
Music	4	*	*	*
Performing arts	235	*	*	*
Photography	36	19	2,796	1,766
Radio and TV	211	13	18,008	8,859
Software/e- publishing	993	223	121,202	93,186
Visual art	149	*	*	*
Writing and publishing	847	37	45,184	26,497
Total	3,945	699	373,695	215,793

CCI Summary: Aberdeenshire

	Employment	Business stock	Turnover (£000s)	GVA (£000s)
Advertising	18	*	*	*
Architecture	165	80	34,334	14,546
Computer games	0	0	0	0
Crafts and antiques	39	13	2,148	759
Cultural education	4	*	*	*
Design	304	208	57,122	25,330
Fashion and textiles	132	90	37,640	15,882
Film and video	11	*	*	*
Libraries and archive	115	*	*	*
Music	5	*	*	*
Performing arts	15	9	1,142	696
Photography	30	*	*	*
Radio and TV	72	17	5,592	3,979
Software/e-publishing	355	208	40,812	31,826
Visual art	30	25	3,624	1,435
Writing and publishing	181	41	11,974	6,286

Total	1,475	691	194,387	100,738
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CCI Summary: Moray

	Employment	Business stock	Turnover (£000s)	GVA (£000s)
Advertising	7	*	*	*
Architecture	70	17	10,375	4,369
Computer games	0	*	*	*
Crafts and antiques	34	5	1,289	521
Cultural education	0	0	0	0
Design	19	11	2,023	905
Fashion and textiles	107	*	*	*
Film and video	11	*	*	*
Libraries and archive	87	0	0	0
Music	0	*	*	*
Performing arts	2	*	*	*
Photography	5	*	*	*
Radio and TV	27	0	0	0
Software/e-publishing	56	20	3,306	2,574
Visual art	1	*	*	*
Writing and publishing	121	12	6,367	4,113
Total	546	65	23,360	12,482

CCI Summary: North East of Scotland

	Employment	Business stock	Turnover (£000s)	GVA (£000s)
Advertising	141	49	13,710	8,950
Architecture	578	192	113,943	48,129
Computer games	*	*	*	*
Crafts and antiques	135	26	5,149	1,905
Cultural education	21	*	*	*
Design	817	486	148,024	65,121
Fashion and textiles	309	180	98,580	44,587
Film and video	205	19	17,028	10,359
Libraries and archive	385	*	*	*
Music	9	*	*	*
Performing arts	250	25	13,278	4,020
Photography	69	33	5,485	3,397
Radio and TV	309	30	23,600	12,839
Software/e-publishing	1,404	451	165,321	127,586
Visual art	179	45	17,471	9,051
Writing and publishing	1,149	90	63,524	36,895

Total	5,960	1,626	685,114	372,838
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4. Beyond the Data

4.1

Introduction

As highlighted in the introduction, the research also gathered information and data from two other sources – interviews with a sample of key stakeholders in the CCI in the North East of Scotland, and case study assessments of the CCI in four benchmark city regions. The purpose of these elements of the research process was to provide a more rounded picture of the CCI in the region, highlighting areas of opportunity and challenges and identifying useful lessons from elsewhere.

In this section we report the findings from this work, adding a more qualitative and reflective dimension to the data analysis reported earlier.

4.2

Stakeholder

Views

Creative and Cultural Industries in the North East

In many ways, the views of local stakeholders echo both the complexity and some of the headline findings of the data analysis. The impression is of a creative sector that is:

- strong and vibrant in parts – visual arts, traditional music, design – but also fragmented and often lacking in visibility;
- generally undervalued within the City and Shire, with a disconnect between the business and creative communities;
- perhaps too comfortable in parts, and sometimes risk averse; and
- underfunded and lacking a coherent voice.

Many pointed to the vibrant grass roots arts community, particularly in Aberdeenshire, which while small in (economic) scale, is clearly important to local

communities and is developing often highly innovative practice (Huntly was considered a good example, along with the Sound Festival).

Within the city, while many identified the value of organisations such as Peacock and Aberdeen Performing Arts, the cost of premises in Aberdeen, and the lack of any identifiable physical focus for the sector were seen as real constraints. The outmigration of creative talent, in part a result of the high costs and also the gravitational pull of other creative centres such as Glasgow and further afield, was also a common theme in the interview feedback.

We also found generally low levels of awareness and knowledge of the more commercial ends of the creative sector, although some identified strengths in software, marketing communications and design activities (including architecture) the majority of which is serving local business markets, particularly the oil and gas industry. As a result, these creative services companies tend to have a low public profile.

Sectors like computer games and television production are not well represented in the region, and wider digital media activity is again low profile and focussed on servicing the needs of the energy industry. Similarly, while some highlighted local music as an interesting area, there is no industrial base or developed infrastructure in this (and other) sectors.

The role of the region's two universities was also discussed. Gray's School of Art is of course a source of creative talent, and RGU itself is heavily involved in course relating to the creative and cultural industries. Aberdeen University's music provision was also highlighted – both its music courses and the university's orchestra. In fact, the university orchestra was seen as filling a gap in the cultural sector (the North East has no comparable professional orchestra). The student populations are also an obvious and significant audience for cultural events, and bring vibrancy to Aberdeen city centre. Some questioned the extent to which current provision was meeting the needs of this audience.

There is also a slight tension identified between the opportunities, on the one hand, to develop a more visible cultural scene as part of the regeneration of Aberdeen city centre, and the relocation of RGU's campus to Garthdee, on the edges of the city. Nevertheless, consultees generally considered both of the city's universities to have a key role to play in the ongoing development of both the creative industries and the cultural sector in the North East region.

However, the region is seen as lacking a signature event or signature asset (which may or may not be a building). There are high quality and valued festivals (the Sound Festival had frequent mention) but they tend to be niche (with the possible exception of the Youth Festival) and there is no flagship arts venue, although the redevelopment of the art gallery could offer some opportunity. Nevertheless, the contrast with Edinburgh's world class festivals, Glasgow's highly regarded producing theatres and visible creative economy (with large players like BBC Scotland) and Dundee's long held reputation of innovation in games and digital media is clear. Stakeholders generally struggled to identify cultural and creative assets or features that could be considered distinctive or unique to the region.

The tourism industry in the region was also a common theme. In general, tourism was felt to be underperforming given the natural assets of the City and Shire and the links into food and drink. However, the region's cultural offer was also considered too diffuse and not well enough promoted to present a compelling proposition in cultural tourism. The lack of a signature event or asset was again highlighted as a constraint on growth in cultural tourism, despite widespread acknowledgement of the need to do more in this area. With the development of the V&A in Dundee and the ongoing pull of the central belt cities and the Highlands, there is a real risk that the North East falls off the tourist map, leaving a visitor economy that is almost entirely dependent on migrant labour for the energy industry.

Civic and Institutional Context

Views on the extent to which the CCI are valued and supported at a civic level were particularly mixed. While virtually all stakeholders identified a lack of engagement between the cultural and business communities, there was also criticism of what some perceived as a lack of Council support. This, it should be noted, is in spite of Aberdeen City Council's reasonably substantial level of investment (relative to some authorities). Of course, more recent cuts in Council budgets, particularly in Aberdeenshire and Moray, will certainly have contributed to a feeling that the sector is not well enough supported. Some also felt that the local press is less than supportive of culture in the region, and provides very little positive coverage.

The very public debate over the redevelopment of Union Terrace Gardens was also seen as negative and divisive, being unhelpfully portrayed as a battle between business and culture in the city. However, the City of Culture bid process was considered by some to have been more positive, bringing at least a sense of shared

purpose and ambition, even if others felt that the process had been less inclusive and communicative than hoped.

In a more positive sense, a number of potential opportunities could arise from this recent experience:

- culture (and the creative industries) is on the civic agenda and has a higher public profile than before;
- the Council has indicated its intention to implement at least part of the planned programme for the City of Culture bid;
- there is clear recognition of the need for improvements in the city centre and culture has at the very least staked its claim to a role in that process; and
- there may be a window of opportunity to capitalise on these developments, even if they have not yet brought success, and start to build a stronger civic partnership around culture and creativity. We return to this issue later.

Beyond the city, there is also strength in the grass roots creative communities in both Aberdeenshire and Moray. The artistic community's response to recent cuts in cultural budgets in Moray was reported as a being encouraging and, despite budget pressures, Aberdeenshire Council is actively considering the economic development potential that the sector offers. These vibrant creative communities in Aberdeenshire and Moray should be seen as opportunities.

Future development

Despite some often pointed views about the shortcomings of the region's creative economy and cultural scene, most stakeholders also saw potential for future development. These tended to cluster around three broad themes:

- a vibrant cultural scene as a crucial component of quality of life;
- the role of culture and creativity in placemaking; and
- growing the more direct economic contribution of the CCI in the North East of Scotland.

Virtually all stakeholders highlighted the role that culture can play in promoting a high **quality of life** for residents. Although the region already scores well on quality of life measures, there was general support for a greater role for culture within this context. This includes the strong community impact exemplified by Aberdeenshire's vibrant

grass roots arts scene, as well as the development of higher quality professional arts provision across the region. The recent shift within Aberdeen Performing Arts toward a more creative-led (rather than solely commercial) model was applauded in this sense.

In part, culture's role in promoting better quality of life is about ensuring wider access to culture from a broader cross section of the community. But it is also very much about the quality of that cultural experience, and in many cases is a question of investment and support.

This can be a difficult argument to promote in times of fiscal austerity and growing focus on economic measures. However, it has never been more important that this case is heard. The North East is engaged in a global talent war as part of the ongoing skills shortages that face the oil and gas industry, and the need to continue to internationalise the energy supply chain. The region needs to attract and retain high end talent, and access to rich cultural opportunity is part of the overall offer that the city can make to globally mobile labour pools. Richard Florida's well established arguments about the role of a vibrant cultural scene in attracting the kinds of knowledge workers that will drive innovation are highly relevant to the North East.

This links directly into the second cluster of opportunities around the role of the creative economy in **placemaking**, with two key dimensions:

- the direct contribution that culture and the creative industries can make to urban renewal and rural development; and
- the role of the CCI in developing an image of places as contemporary, vibrant and innovative.

While there was real disappointment around the Union Terrace Gardens debate, many felt that this had at least highlighted in a public sense the role that the CCI could have in urban renewal, combined with a very clear acknowledgement of the need to regenerate parts of Aberdeen city centre.

Plans to develop the Belmont Picture House as a hub for moving image activity, combined with the redevelopment of the Aberdeen Art Gallery and the opening of the 17 art space in Belmont Street all start to suggest an area of potential physical focus for the creative sector.

Similarly, there was a clear sense that culture should be involved at an early stage in new plans for City Gardens, even if there was a degree of cynicism about the likelihood of a sufficiently ambitious solution.

In terms of wider placemaking and the promotion of the region, a numbers of issues and ideas arose from the discussions:

- developing festivals and events (e.g. a lighting festival for the city centre; further development of the Sound Festival etc);
- investment into the cultural infrastructure of the region (art gallery, theatre development etc);
- development of incubators for new start up creative companies, and artists' studios/ villages in empty properties throughout the region; and
- stronger push from VisitAberdeen on the promotion of the region's culture as part of its visitor offer – both within the city and across the surrounding area.

Although ideas only at this stage, these do start to suggest an outline programme of possible development for the region's creative sector, as discussed further in the next section.

In relation to growing the more **direct economic contribution** of the creative sector in the North East, opportunities were identified around:

- creative/ tech start-up incubators, potentially with involvement of the universities;
- development of creative networks to raise profile and encourage collaborative working;
- access to facilities (again potentially within the universities) for 3D printing and prototyping;
- ongoing development of opportunities as a film location (building on current growth in this area); and
- wider promotion of the creative economy in the region.

4.3

Lessons from

Elsewhere

In seeking to identify useful lessons from experience elsewhere, the research examined four case studies of other city regions. As noted earlier, Aberdeen does not fit the typical model of a post-industrial city, and has not faced the same kinds of acute economic challenges that others have had to tackle with the decline in heavy industry. This raises particular issues for the selection of suitable comparators, particularly when considering the role of the creative and cultural industries.

In large part, the dominant narrative of creative city development is indeed one of post-industrial reinvention. From Rotterdam to Glasgow, the decline of manufacturing has forced cities to diversify their economic base, and many have looked to the creative economy as part of a wider knowledge-based economy policy. Within Scotland, Glasgow and Dundee both fit this bill, as do Manchester, Liverpool, Newcastle/ Gateshead and even Bristol, all of which have a strong and distinctive creative industries story to tell.

Other major global centres for the creative industries may be less post-industrial, but are also poor comparators simply by virtue of their scale and concentration of creative activity – New York, London and, increasingly, Shanghai would all be in this camp.

Instead, we have focussed on those comparators against which Aberdeen tends to benchmark itself and against which it regularly competes for business and talent.

These are four of the world's leading energy cities:

- Calgary;
- Perth;
- Houston; and
- Stavanger.

More detailed case study reports are provided in the appendix, with the main points arising from the analysis set out below.

Interest in the Creative Economy

With the exception of Stavanger, all of the four comparators are much larger cities than Aberdeen, yet all share certain characteristics in that none are capital cities and all have some degree of geographic isolation. They are all prosperous and are, of course, world centres for oil and gas.

The first and most immediately striking finding from the analysis is that all four have a strong interest in the creative economy in terms both of cultural activity and the more commercial creative industries. Yet each has a different story to tell.

The largest of the four, **Houston**, is dominated by the oil industry, and also has concentrations of activity in biomedical research, transportation and aerospace. Recent years have seen strong growth in the creative industries, with almost 150,000 people now working in the sector and growth rates that outstrip the creative industries in much of the rest of the US. Creative workers' earnings are higher in Houston than elsewhere in the US and there are more than 500 visual and performing arts organisations in the city.

Here there is evidence of strong civic support for the cultural sector in particular through city-led organisations such as the Houston Arts Alliance and the City of Houston Cultural Affairs Office. Funding for the arts in the city comes directly from a hotel occupancy tax, and links to the business community are actively encouraged through the Arts and Business Council of Houston.

Perth in Australia is similarly dominated by oil and mining, and is one of the most isolated cities in the world. The creative industries account for just over 5% of total employment in the city, and there is strong civic and state interest in supporting culture, particularly as part of urban renewal schemes.

In particular, the Perth Cultural Centre is a major cultural quarter and urban renewal project that has been in continuous development since 2004. Combining the state's most significant cultural assets and institutions within well-designed public spaces, the centre aims to increase access to culture particularly amongst children and older people.

Of the four, it is perhaps Calgary and Stavanger that offer the most interesting comparators. **Calgary** is a thriving hub of creative and cultural industries. On the cultural side it has taken a measured and structured approach starting with detailed research into the cultural assets of the city followed by a plan of substantial

investment in the cultural infrastructure. In a city of just over a million people, there are 190 venues of performing arts, and over 100 establishments for the display of art including galleries, museums and other cultural institutions. The city is also home to the Alberta Ballet, the Calgary Philharmonic Orchestra and the Calgary Opera.

The EPCOR Centre for the Performing Arts is one of the largest arts complexes in Canada and hosts more than 1,700 performances and events annually, while over three million people attend the city's major cultural events each year. The Calgary Arts Development Agency provides funding for arts organisations and the city was named a cultural capital of culture in Canada in 2012.

The creative industries are also strong in the city with concentrations of activity in games, music, digital media and e-publishing. Estimates are that 10% of the city's workforce is employed in the creative sector and there are more than 700 digital media companies supported by an industry-led organisation, Digital Alberta. The city's economic development agency also developed purpose built soundstages for the film and TV industries handling production volumes of \$100m per annum.

The city's universities produce over 7,000 graduates with creative industries related degrees each year, and there are strong partnerships between the universities and the local creative sector, an area of potential opportunity for Aberdeen.

Calgary's approach to the creative sector has been quite economic in focus, rather than the more 'quality of life' driven approach taken in, for example, Perth. Nevertheless, this is still very much driven both by civic authorities (with massive investment in cultural infrastructure) and by grass roots industry (for example Art Central is a downtown arts hub which has developed to include retail space, studios, galleries and a restaurant). On the industrial side, technology and innovation are key drivers and the links to higher education a critical part of the mix.

Stavanger is well known for being European Capital of Culture in 2008, but unlike other recipients of the title (e.g. Glasgow and Liverpool) the city was not in urgent need of regeneration. In common with the other comparators, Stavanger is a wealthy city, built again on revenues from the energy industry. It is, however, a city that very much values culture and has evolved both a long term planning approach and a delivery method based on wide partnership across business, the public sector and academia.

Rogaland Theatre was established in Stavanger in 1947 and annually presents 10 - 14 theatre productions. On average, there are 500 performances per year for a

crowd of between 90,000 and 110,000. In 2012 the new Stavanger Concert Hall opened, with two halls, rehearsal rooms for Stavanger Symphony Orchestra, a foyer with restaurant, cafe and bars, and a large amphitheatre for outdoor concerts.

The City of Culture programme was pursued with an explicit focus on regional development and on improving the profile and image of the city. While there is scant evidence on the impacts of this on Stavanger (or other Cities of Culture) the intent is significant. Stavanger's approach is very much driven by civic authorities, but is not dominated by a direct economic imperative (e.g. to grow the cultural sector's economic contribution). Rather it is based on the recognition that a vibrant cultural scene is good for the city's image and as a consequence, good for business.

The city has attempted to maintain some of this momentum both through annual festival's programme and more recent investment such as the concert hall. The Municipality of Stavanger also bought the former Tou Brewery in 2009 and redeveloped the site as a multi-functional arts centre. Research into the impacts of the Capital of Culture has been somewhat inconclusive, but did find a broadly positive response from the city's cultural sector.

Lessons

While a study of this nature can really only provide outline coverage of the comparator cities, a number of headline findings and possible lessons do emerge:

- policy interest in culture and the creative industries is not solely driven by a need to respond to economic challenge – even wealthy cities have seen the value of investing in culture;
- much of the investment has been led by public sector interests, but partnerships are also a common theme, particularly in Calgary, the city that has arguably enjoyed greatest success with its creative economy;
- Calgary again offers the lesson that the involvement of the higher education sector is important, and can be a driver of innovation and talent, but that effective partnerships at civic level are important together with close links to the creative sector;
- much of this civic interest is motivated by quality of life issues and by the need to offer an appealing range of culture and leisure activities to internationally mobile talent and to visitors;

- headline coverage of large events such as City of Culture years tend to emphasis the spectacular – the large festival and events – at the expense of more locally rooted activities – this is not always a sustainable approach and Stavanger’s more low-key programme appears to have been good for the city’s cultural sector; and
- all of the cities have invested in culture as a means of urban renewal, creating hubs and clusters for creative businesses and/ or artists. These are always city centre, although they vary in scale from the relatively modest (Tou Brewery in Stavanger) to the very substantial (Perth Cultural Centre). The tangible link between culture and place is clear.

5. Conclusions

5.1 Introduction

Drawing a clear set of conclusions from such rich but complex data can be challenging, but a number of headline messages do start to emerge. We have grouped these into three broad headings:

- the CCI sector in the North East of Scotland;
- issues and challenges; and
- ideas for future development.

5.2 The CCI Sector in the North East of Scotland

The CCI in the North East of Scotland employ 6,000 people in just over 1,550 businesses. This equates to 9% of total employment in the CCI in Scotland and 13% of the total number of CCI businesses, suggesting smaller average business size in the North East.

The sector generates annual revenues in excess of £600m, and GVA of almost £373m. Productivity is high compared to the rest of Scotland (CCI) and to the national economy as a whole.

Unsurprisingly, the CCI is highly concentrated in Aberdeen City, accounting for more than two thirds of the jobs in the sector and a similar proportion of annual revenues.

Like the CCI across Scotland and much of the UK, the recession has been challenging for the sector in the North East, and overall employment fell between 2009 and 2011, albeit at a rate slightly lower than for Scotland as a whole (14% compared to 17%).

However, the same period has seen an increase in the numbers of CCI businesses in the region as well as growth in revenues and GVA, suggesting both a degree of fragmentation and start-up and possible efficacy gains. Of course, this could also

reflect over capacity within the sector prior to the recession. Certainly, GVA per head has also increased while it has reduced at national level.

Beneath these headlines some more detailed conclusions can be drawn:

- the sector has a somewhat different character and structure to that seen elsewhere in Scotland. Software is important everywhere and publishing is in long term decline in every part of Scotland (and arguably the UK and internationally). While Glasgow has broadcasting, Dundee is strong in digital media and Edinburgh is creative services driven, the North East appears to be strong in design – architecture, design and fashion are all important components of the local creative economy, as is visual art and to some extent advertising. By contrast, performing arts, film and video and photography have all been struggling, and there is little to suggest competitive advantage in radio and TV;
- the greatest pressure has been on employment, with revenues in key subsectors holding up and even improving through the worst of the downturn suggesting a focus on high value add and a degree of resilience;
- although the sector is mainly concentrated in Aberdeen City, Aberdeenshire has some activity in design, fashion and textiles, software and architecture, and generates in excess of £100m in annual GVA, just less than half the total GVA of Aberdeen City's CCI; and
- Moray is the weakest of the three areas, and appears to be concentrated on lower value ends of the CCI spectrum, although data issues have constrained more thorough assessment.

5.3

Issues and

Challenges

While the data analysis contains some positive messages about the creative sector in the North East, the view from the ground is in many ways more challenging. While there are pockets of real strength, both creatively and economically (as identified in the data) there are still issues with fragmentation, small business size and low visibility across the sector, as well as a lack of confidence and, for some, a lack of vision and ambition.

The cultural sector in the region is strong at the grass roots end, but less so the higher up the scale it goes. There is no producing theatre, and no signature events or assets, although the revitalised art gallery might provide an opportunity to address this. For now, this not only impacts on the region's cultural offer but also its offer to visitors. This feels like a missed opportunity for a city of Aberdeen's scale and history.

Perhaps more worryingly, there is a feeling (at least in some quarters) that the sector is not as valued as it is elsewhere, and the public row over Union Terrace Gardens has damaged already fractured relationships between the business community and the cultural sector.

High costs and lack of regular work opportunities contribute to the region's difficulties in retaining creative talent and while there is a reportedly strong creative services sector focussed on the energy industry, this has a low level of public visibility. As a result Aberdeen is notable in that it is the only one of Scotland's four major cities whose identity is not culturally derived.

However, there is clearly a degree of political interest in the sector right now, partly as a legacy of the failed City of Culture bid, but also through the efforts of a small number of individuals around the region to raise the sector's profile. There may be a window of opportunity now to capitalise on this and influence the Council's plans for the City of Culture programme.

Most obviously, the sector needs leadership both from within the sector itself and at a civic level through the Councils and the major institutions such as the universities.

5.4 Future Development

5.4.1 Strategic Development

It can be tempting for cities to look to flagship events and iconic capital projects to revitalise their cultural offer, build reputation and renew tired urban landscapes. While such 'big ticket' projects can bring benefits, they can also come at the expense of developing that which is more locally grounded and often distinctive.

For the North East there is a need to develop real leadership for the sector and to articulate some kind of vision for its future. These are both lacking at present. It is

not the purpose of this study to develop that vision, but there are three broad themes that may now prove useful to consider:

- the cultural offer of the region contributes to the overall quality of life that it offers, which is in turn a key part of its appeal to internationally mobile talent. It can also help retain homegrown talent if there is sufficient opportunity;
- culture and the creative industries can help regenerate the urban realm both through the application of design and creativity (areas in which the region has some strength) and through the clustering effect that brings life to city centres and kick starts economic activity; and
- there are creative businesses in the region that are clearly doing well, and there will be opportunities to continue to develop their competitiveness through the right kinds of support. There is also potential to encourage a more vibrant start-up culture taking the creativity and technological expertise coming through the region's universities and colleges.

The issue of leadership may be more difficult. Few of the consultees saw obvious leadership coming from the sector itself, nor from the civic partners. Indeed, leadership may only emerge from an informed and inclusive debate about the future for the creative and cultural sector in the region. Who then should lead such a debate?

RGU itself has made clear its intention to play a leading role in civic debate, and the Steering Group brought together to inform this study may offer a useful starting point. The next steps would be to develop a process through which both to disseminate the findings of the current study and pose challenges around the future vision and direction for the sector.

There are also some important messages in the research for different communities of interest. These are:

For the creative and cultural sector:

- to recognise both the scale and nature of the economic (and social) contribution that the sector makes;
- to develop a more consistent and coherent voice through which to stimulate more productive means of civic engagement;

- to develop a shared and ambitious vision of the future role of the sector in the region; and
- to work to bridge the gap between the creative sector and the business community by finding areas of mutual interest (quality of life being a clear opportunity).

For the civic authorities:

- to recognise the sector's economic and social value and commit to a process of meaningful engagement;
- to examine the opportunities to enable the creative and cultural sector to play a more effective and more visible role in urban renewal and the development of more rural communities;
- to champion the sector in the region within relevant national fora, and with national organisations such as Creative Scotland and the Scottish Government; and
- to promote the region's cultural offer more effectively to residents, visitors and to potential migrant workers and employers.

For the business community:

- to acknowledge the economic value of the sector as a whole and its role in supporting a more diverse regional economy;
- to commit to more productive engagement with the creative and cultural sector around issues of civic renewal and regional promotion (quality of life again); and
- to play a supportive role in championing the cultural offer of the region.

For RGU (and Aberdeen University):

- to provide intellectual leadership and stimulus for a meaningful cross-sector debate about the future role for culture and the creative industries in the North East of Scotland;
- to work with relevant partners on the development of mechanisms to retain creative talent within the region post graduation; and

- to connect creative talent and technological and business expertise within the academy both through multidisciplinary education and research, but also through progressive civic engagement and development initiatives.

For all constituencies, the goal is to work towards a more productive partnership. The creative and cultural sector is not a panacea for future economic diversification, improved quality of life or a vibrant visitor economy. But it certainly has a role to play, and that role will be significantly enhanced by a clear and shared vision, and effective engagement across the region. That is both the opportunity and the challenge for the North East.

In framing and informing this debate, a number of more specific opportunities have been identified through the research, and may become the basis for partnerships at a more practical level – the level at which effective partnership always happens:

- the redevelopment of Aberdeen Art Gallery and its role as a central focus for the city's cultural life;
- the potential for the Belmont Street area to evolve as a creative hub;
- creative/ tech start-up incubators;
- creative networks and a high level cultural forum to drive policy and raise the profile of the sector at regional and national levels;
- renewed effort on promotion of the cultural offer to visitors;
- delivery of effective support (and funding) to the grass roots levels across the Shire and in parts of the City;
- development of a cultural and events programme that can both excite wider interest (from beyond the region) and help build capacity *within* the region by developing a producing culture in the North East;
- imaginative use of empty spaces and buildings for cultural and creative businesses; and
- the early involvement of cultural practitioners and design expertise in city centre regeneration projects.

Appendix

Appendix A: Definition of Creative and Cultural Industry

Appendix B: CCI Occupation by Age (2012) – SOC Code
2010

Appendix A: Definition of Creative and Cultural Industry

Table A.1: Definition of Creative and Cultural Industry (SIC Code 2007)

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
Visual Art	1. Advertising	SIC 73.11: Advertising agencies
		SIC 73.12: Media representation
	2. Architecture	SIC 71.11: Architectural activities
	3. Visual art	SIC 90.03: Artistic creation (70%)
		SIC 47.78/1: Retail sale in commercial art galleries
	4. Crafts and Antiques	SIC 31.09: Manufacture of other furniture
		SIC 16.29: Manufacture of other wood products (30%)
		SIC 32.12: Manufacture of jewellery and related products
		SIC 32.13: Manufacture of imitation jewellery and related articles
		SIC 23.41: Manufacture of ceramic household and ornamental articles (35%)
		SIC 23.49: Manufacture of other ceramic products (35%)
		SIC 23.13: Manufacture of hollow glass (15%)
		SIC 23.19: Manufacture of other glass (15%)
		SIC 47.79/1: Retail sale of antiques and antique books
		SIC 95.24: Repair of furniture and home furnishings
5. Fashion and textiles	SIC 13: Manufacture of textiles (25%)	
	SIC 14: Manufacture of wearing apparel (20%)	
	SIC 15: Manufacture of leather and related products (20%)	

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
		SIC 74.1: Specialised design activities (25%)
	6. Design	SIC 71.12/1: Engineering design activities for industrial process and production
		SIC 74.1: Specialised design activities (75%)
Performance	7. Performing arts	SIC 90.01: Performing arts
		SIC 90.02: Support activities to performing arts
		SIC 90.04: Operation of arts facilities
		SIC 78.10/1: Motion picture, television and other theatrical casting
Audio-Visual	8. Music	SIC 59.2: Sound recording and music publishing activities
		SIC 18.20/1: Reproduction of sound recording
		SIC 32.2: Manufacture of musical instruments
	9. Photography	SIC 74.20/1: Portrait photographic activities
		SIC 74.20/2: Other specialist photography (not including portrait photography)
		SIC 74.20/9: Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.
	10. Film and video	SIC 18.20/2: Reproduction of video recording
		SIC 59.11/1: Motion picture production activities
		SIC 59.11/2: Video production activities
		SIC 59.12: Motion picture, video and television programme post-production activities (25%)
SIC 59.13/1: Motion picture distribution activities		
SIC 59.13/2: Video distribution activities		

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
		SIC 59.14: Motion picture projection activities
	11. Computer Games	SIC 58.21: Publishing of computer games
		SIC 62.01/1: Ready-made interactive leisure and entertainment software development
	12. Radio and TV	SIC 59.11/3: Television programme production activities
		SIC 59.13/3: Television programme distribution activities
		SIC 59.12: Motion picture, video and television programme post-production activities (75%)
		SIC 60.1: Radio broadcasting
		SIC 60.2: Television programming and broadcasting activities
Books and Press	13. Writing and Publishing	SIC 90.03: Artistic creation (30%)
		SIC 58.11: Book publishing
		SIC 58.13: Publishing of newspapers
		SIC 58.14: Publishing of journals and periodicals
		SIC 58.19: Other publishing activities
		SIC 18.11: Printing of newspapers
		SIC 18.129: Other printing (not labels)
		SIC 18.13: Pre press and media services
		SIC 63.91: News agency activities
Heritage	14. Libraries and archives	SIC 91.01: Libraries and archive activities
Digital Industries	15. Software/electronic publishing	SIC 58.29 Other software publishing
		SIC 62.01/2: Business and domestic software development
		SIC 62.02: Computer consultancy activities

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
Cultural Education	16. Cultural education	SIC 85.52: Cultural Education

Source: Scottish Government High Growth Sector

Table A.2: Scottish Creative and Cultural Industry – 16 Groupings (SIC Code 2007)

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
Visual Art	1. Advertising	SIC 73.11: Advertising agencies
		SIC 73.12: Media representation
	2. Architecture	SIC 71.11: Architectural activities
	3. Visual art	SIC 90.03: Artistic creation (100%)
		SIC 47.78/1: Retail sale in commercial art galleries
	4. Crafts and Antiques	SIC 31.09: Manufacture of other furniture
		SIC 32.12: Manufacture of jewellery and related products
		SIC 32.13: Manufacture of imitation jewellery and related articles
		SIC 47.79/1: Retail sale of antiques and antique books
		SIC 95.24: Repair of furniture and home furnishings
	5. Fashion and textiles	SIC 13: Manufacture of textiles (100%)
		SIC 14: Manufacture of wearing apparel (100%)
		SIC 15: Manufacture of leather and related products (100%)
		SIC 74.1: Specialised design activities (100%)
	6. Design	SIC 71.12/1: Engineering design activities for industrial process and production
SIC 74.1: Specialised design activities (100%)		
Performance	7. Performing arts	SIC 90.01: Performing arts
		SIC 90.02: Support activities to performing arts
		SIC 90.04: Operation of arts facilities

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
		SIC 78.10/1: Motion picture, television and other theatrical casting
Audio-Visual	8. Music	SIC 59.2: Sound recording and music publishing activities
		SIC 18.20/1: Reproduction of sound recording
		SIC 32.2: Manufacture of musical instruments
	9. Photography	SIC 74.20/1: Portrait photographic activities
		SIC 74.20/2: Other specialist photography (not including portrait photography)
		SIC 74.20/9: Other photographic activities (not including portrait and other specialist photography and film processing) n.e.c.
	10. Film and video	SIC 18.20/2: Reproduction of video recording
		SIC 59.11/1: Motion picture production activities
		SIC 59.11/2: Video production activities
		SIC 59.13/1: Motion picture distribution activities
		SIC 59.13/2: Video distribution activities
		SIC 59.14: Motion picture projection activities
	11. Computer Games	SIC 58.21: Publishing of computer games
SIC 62.01/1: Ready-made interactive leisure and entertainment software development		
12. Radio and TV	SIC 59.11/3: Television programme production activities	
	SIC 59.13/3: Television programme distribution activities	
	SIC 59.12: Motion picture, video and television programme post-production activities (100%)	
	SIC 60.1: Radio broadcasting	

Cultural Domain	Scottish Creative & Cultural Industries	SIC 2007
		SIC 60.2: Television programming and broadcasting activities
Books and Press	13. Writing and Publishing	SIC 58.11: Book publishing
		SIC 58.13: Publishing of newspapers
		SIC 58.14: Publishing of journals and periodicals
		SIC 58.19: Other publishing activities
		SIC 18.11: Printing of newspapers
		SIC 18.129: Other printing (not labels)
		SIC 18.13: Pre press and media services
		SIC 63.91: News agency activities
		Heritage
Digital Industries	15. Software/electronic publishing	SIC 58.29 Other software publishing
		SIC 62.01/2: Business and domestic software development
		SIC 62.02: Computer consultancy activities
Cultural Education	16. Cultural education	SIC 85.52: Cultural Education

Source: Scottish Government High Growth Sector

Appendix B: CCI Occupation by Age (2012) – SOC Code 2010

Table X.X: CCI Occupation by Age (2012) SOC Code 2010

Creative Industries Scotland	16-24	25-34	35-44	45-54
1134 Advertising and public relations directors	-	-	*	*
1136 Information technology and telecommunications	-	1,077	3,025	3,499
2133 IT specialist managers	*	*	1,665	1,222
2134 IT project and programme managers	-	2,186	3,207	2,851
2135 IT business analysts, architects and systems designers	*	5,578	5,399	2,961
2136 Programmers and software development professionals	*	799	1,132	*
2137 Web design and development professionals	*	2,610	4,810	2,641
2139 Information technology and telecommunications	-	2,690	570	2,181
2431 Architects	-	*	*	*
2435 Chartered architectural technologists	-	726	2,275	1,431
2451 Librarians	*	-	*	599
2452 Archivists and curators	-	*	-	*
2471 Journalists, newspaper and periodical editors	-	433	1,674	1,011
2472 Public relations professionals	-	*	1,016	*
2473 Advertising accounts managers and creative directors	-	1,053	201	*
3121 Architectural and town planning technicians	-	1,240	216	*
3122 Draughtspersons	*	791	941	1,081
3411 Artists	*	-	*	674
3412 Authors, writers and translators	*	569	1,328	1,261
3413 Actors, entertainers and presenters	*	*	*	360
3414 Dancers and choreographers	*	-	*	*
3415 Musicians	*	*	*	*
3416 Arts officers, producers and directors	-	719	2,106	*
3417 Photographers, audio-visual broadcasting equipment	*	1,190	1,378	*
3421 Graphic designers	*	2,313	1,023	608
3422 Product, clothing and related designers	*	2,577	705	728
3543 Marketing associate professionals	1,627	2,626	2,198	1,691
4135 Library clerks and assistants	*	*	1,974	1,081
5411 Weavers and knitters	-	*	*	352
5414 Tailors and dressmakers	-	*	*	*
5419 Textiles, garments and related trades	-	-	*	*
5421 Pre-press technicians	-	*	-	*
5422 Printers	-	602	439	235
5423 Print finishing and binding workers	-	-	*	-
5441 Glass and ceramics makers, decorators and finishers	-	-	*	-
5442 Furniture makers and other craft woodworkers	*	352	*	426
Total	1,627	30,131	37,282	26,921

Source: Annual Population Survey