



Creative Bath

**The Creative Industries in Bath
and North East Somerset**

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CONTENTS

Executive Summary	1
1 Introduction.....	3
Introduction	3
Definition of the Creative Industries	3
2 Bath and North East Somerset Creative Industries in Summary	4
Summary Economic Overview of SWRDA Defined Creative Industries in Bath and North East Somerset.....	4
3 Enterprise and Employment.....	6
Employing Units.....	6
Employees	12
Self-Employment.....	18
Total Employment.....	20
Total Enterprises.....	22
Total Turnover	24

Executive Summary

Under the SWRDA definition of the Creative Industries, Bath and North East Somerset contains:

- 700 employing business units with 4,200 employees
- 2,500 further individuals in self-employment
- A total of 6,700 people reliant upon the Creative Industries for their livelihood
- 3,200 separate 'enterprises'
- Total Creative Industries enterprise turnover somewhere in the region of £800 million per annum

Whilst Bristol is undoubtedly the largest Creative Industries economy in the South West, Bath and North East Somerset takes the regional lead in the Creative Industries in terms of its concentrations of Creative Industries businesses in the sector **and** its concentrations of employment in the sector:

- Creative Industries in Bath and North East Somerset account for 8.3% of all employing units, the highest proportion amongst all Upper Tier Local Authorities in the South West of England and well above the regional average of 5.2% and the national average of 5.8%.
- Creative Industries in Bath and North East Somerset account for 5.4% of all employees, the highest proportion amongst all Upper Tier Local Authorities in the South West of England by a considerable margin. In fact, Bath and North East Somerset proportion of employment in the Creative Industries is more than twice the South West regional proportion (2.5%) and significantly higher than the national average of 3.0%.

If it is viewed as a Sector in its own right, and on both the key measures of business volumes and employee volumes, Bath and North East Somerset Creative Industries Sector is the 5th largest of the 10 broad sectors which comprise the local economy. In fact, there are more businesses located in the Sector in Bath and North East Somerset than in such industries as Other services, Manufacturing, and Transport and communications and more employees than Construction. There are also more businesses and employees in the Creative Industries than in Tourism.

As well as leading the way in overall business concentration **and** employee terms, Bath and North East Somerset holds the regional lead, on **both** measures, in a number of key sub-sectors of the Creative Industries:

- Publishing of books
- Publishing of journals
- Publishing of sound recordings
- Other publishing
- Architectural and engineering activities and related technical consultancy
- Artistic and literary creation

Bath and North East Somerset also holds the regional lead in **business concentration** terms in Advertising and, though not leading regionally, there is also evidence of significant above-average business representation in Bath and North East Somerset in Radio and television activities. There is also evidence of significant Bath and North East Somerset **employee over-representation / concentration** in Advertising and Cinemas.

Combined, the above findings clearly establish the Bath and North East Somerset workplace economy as the most 'Creative Economy' within the South West of England.

It should be noted that this study has only considered the 'Direct' economic impact of the Creative Industries. The 'Indirect' impact of the Sector, through the supply chain, has not been included. Also not included in this analysis is the 'Induced' impact of the Sector, as those working directly and in the supply chain spend their income on final goods and services. In general, the inclusion of Induced and Indirect effects will often double the Direct impact; in other words, for each £ of turnover or job illustrated in this report, there is likely to be a further £ of turnover, or job, which is attributable to the Creative Industries indirectly or through induced effects.

Survey responses from the Digital Media survey of Creative Industries businesses in Bath and North East Somerset covered 8% of actual employing units¹, 7% of actual employees and 6% of actual turnover. The analysis suggests that there is considerable scope for further engagement with enterprises in the Creative Industries in Bath and North East Somerset, and particularly amongst the very smallest enterprises in the Sector. Current engagement with enterprises outside of the Bath City area of Bath and North East Somerset appears severely limited. There is also considerable opportunity for Creative Bath to engage further with small and large enterprises which are not based in Bath and North East Somerset. For the most part, these enterprises are located in Bristol, Frome / Somerset, Bradford on Avon / Wiltshire.

It is recommended that the first step in increasing Creative Bath's enterprise engagement is the establishment, and population, of a Creative Bath enterprise database.

There is no doubt that, with its volume and concentration of Creative enterprises, the Creative Industries is a priority sector for Bath and North East Somerset. As well as overall Cluster support and development (to reap the economic and social benefits which accrue from this), there are a number of other arguments in favour of sector support and intervention for the Creative Industries in Bath and North East Somerset:

- helping rural self-employed access markets and support services
- specialist start-up support for the smallest of Creative enterprises
- overall Cluster support, development and integration, particularly outside of Bath City
- public art provision
- use of the Creative Industries in the delivery of other public services such as health and safety, education and training, and tackling crime and deprivation
- the regional role of Bath as the region's Creative Capital.

¹ Organisations registered for PAYE - a good proxy for businesses with employees

1 Introduction

Introduction

- 1.1 This report represents the findings of an economic analysis of the Creative Industries in Bath and North East Somerset. The study provides an economic overview of the Sector through an analysis of the main economic indicators of employment, turnover and enterprises.

Definition of the Creative Industries

- 1.2 The study adopts the South West of England Regional Development Agency (SWRDA) definition of the Creative Industries. The definition, constructed from the UK Standard Industrial Classification system (SIC) contains the following industries:

- **Publishing of books**
- **Publishing of newspapers**
- **Publishing of journals and periodicals**
- **Publishing of sound recordings**
- **Other publishing**
- **Architectural and engineering activities and related technical consultancy**
- **Advertising**
- **Photographic activities**
- **Motion picture and video production**
- **Motion picture and video distribution**
- **Motion picture projection**
- **Radio and television activities**
- **Artistic and literary creation and interpretation**

- 1.3 The SWRDA definition of the Creative Industries is a fairly narrow definition which excludes such activities as the Operation of Arts facilities (SIC2003 92.32), the activities of Graphic designers (SIC2003 74.87/2) and Software consultancy and supply (which includes Games development *as part of* SIC2003 72.21 and web design (which is included *as part of* SIC 72.22). The significant activities of education and training establishments in any, and all, of the SWRDA sub-categories of the Creative Industries shown above are also excluded from the SWRDA definition.

- 1.4 Though excluded from the SWRDA definition of the Creative Industries, these four further Creative activities are included within the membership of Creative Bath and were included within the Digital Media Business Mapping study. However, with the exception of the Operation of Arts facilities, the extraction of the Creative element from the SIC in which they reside is not possible from the official statistics of employment which are available at the local level (which go down to four-digit SIC only). As a result, this report, which makes considerable use of official employment data by SIC, considers the SWRDA definition of the Creative Industries only.

2 Bath and North East Somerset Creative Industries in Summary

Summary Economic Overview of SWRDA Defined Creative Industries in Bath and North East Somerset

- 2.1** Table 2.1 shows an economic summary of the Creative Industries in Bath and North East Somerset.
- 2.2** Please note that all data in the Table are estimates based on official employment data for each SIC sub-category shown. Please also note that data has been rounded to maintain confidentiality. Self-employment was estimated through the use of national ratios of employees to self-employed in a particular sub-category. Turnover was estimated through the use of national turnover per head multipliers for employees in employment in a particular sub-category. Both these latter assumptions (for self-employment and turnover) assume that the Bath and North East Somerset Creative Industries are structured (in terms of employment vs. self employment), and perform (in terms of turnover), similar to the industry nationally. In practice, this is highly likely to be the case.
- 2.3** The Table shows the 'Direct' economic impact of the Sector. The 'Indirect' impact of the Sector through the supply chain has not been included. The 'Induced' impact of the Sector, as those working directly and in the supply chain spend their income on final goods and services, has also been excluded².

Key points about Bath and North East Somerset under this definition

- 700 employing units³ with 4,200 employees
- 2,500 further individuals in self-employment
- A total of 6,700 people reliant upon the Creative Industries for their livelihood
- 3,200 separate 'enterprises'⁴
- Total turnover of these enterprises estimated to be somewhere in the region of £800 million

² These can be calculated. Recommendation for future. The inclusion of these effects often doubles the impact in terms of jobs and output.

³ organisations registered for PAYE - a good proxy for businesses

⁴ An enterprise is defined here as employing units and self-employed individuals

Table 2.1 Estimates of SWRDA-Defined Creative Industries in Bath and North East Somerset in 2007

	Data Units	Employees	Self Employment	Total Employment	'Enterprises'	Unit Turnover	Self-Employment Turnover	Total Turnover
SWRDA CI Sub-Sector	Volumes	Volumes			Volumes	£ million		
Publishing of books	50	200	50	250	100	25.0	6.2	31.2
Publishing of newspapers	-	-	-	-	-	16.0	0.7	16.7
Publishing of journals and periodicals	50	1,000	200	1,200	250	117.1	23.8	140.8
Publishing of sound recordings	-	-	-	-	-	15.5	0.0	15.5
Other publishing	50	100	-	150	50	7.7	1.5	9.2
Architect/engineering	300	1,850	800	2,600	1,100	190.1	80.8	270.9
Advertising	50	350	150	500	200	79.2	30.8	110.0
Photographic activities	50	50	100	150	150	2.7	5.2	7.9
Motion picture and video production	50	50	-	50	50	4.3	1.9	6.3
Motion picture and video distribution	-	-	-	-	-	0.4	0.0	0.4
Motion picture projection	-	-	-	-	-	4.2	0.0	4.2
Radio and television activities	-	-	-	-	-	8.2	2.8	11.1
Artistic and literary creation and interpretation	150	250	1,200	1,450	1,300	28.7	128.9	157.6
All Creative Industries	700	4,200	2,500	6,700	3,200	499.1	282.6	781.7

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All turnover figures are at 2007 prices (the latest available)

All unit data and employee data rounded to nearest 50 units and all employee data rounded to nearest 50 units to prevent data disclosure.

A cell marked '-' indicates a low or negligible value

3 Enterprise and Employment

Employing Units

Employing unit volumes in the Creative Industries and percentage of All Industries

- 3.1** Table 3.1 shows 'employing unit' volumes for Bath and North East Somerset, alongside similar data for all the Upper Tier local authorities in the South West of England. At the foot of the Table, the proportion of the Creative Industries as a percentage of All industries in the economy is also shown. The regional and national volumes (and percentages) are also shown.
- 3.2** Please note that an 'employing unit' is essentially an address registered for PAYE.
- 3.3** In summary:
- Bath and North East Somerset has 700 employing units...
 - ...300 of which are in Architectural and engineering activities and related technical consultancy and a further 130 in Artistic and literary creation
 - Creative Industries in Bath and North East Somerset account for 8.3% of all employing units, the highest concentration amongst all Upper Tier Local Authorities in the South West of England
 - The next highest, Bristol, is some considerable way behind with 7.3% of units
 - Bath and North East Somerset representation of Creative Industries as a percentage of all businesses is well above the regional average of 5.2% and the national average of 5.8%
 - Bath and North East Somerset has more than twice as many units in the Creative Industries than Cornwall, Plymouth and Torbay. It has half as many as Bristol.
 - Bath and North East Somerset units in the Creative Industries represent exactly 6% of regional units in the sector.

Table 3.1 Employing Units in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	30	10	40	20	50	20	50	-	10	10	10	40	10	-	10	40	330	2,940
Publishing of newspapers	-	-	10	10	10	10	10	-	-	-	-	10	-	-	-	-	70	860
Publishing journals etc	30	10	20	30	50	20	20	-	10	-	10	30	10	10	-	30	270	2,740
Publishing of sound recordings	10	-	10	-	10	10	-	-	-	-	-	10	-	-	-	10	60	1,210
Other publishing	30	10	30	30	50	20	40	-	10	-	10	30	10	-	10	40	300	2,980
Architectural/engineering	300	130	510	380	770	500	830	-	280	160	180	600	350	190	80	570	5,820	66,380
Advertising	70	60	110	70	120	70	140	-	40	20	30	80	30	30	20	90	980	13,370
Photographic activities	30	30	90	60	100	70	110	-	20	20	20	50	20	20	10	70	720	9,280
Motion picture/ video production	30	10	120	30	40	30	60	-	20	20	10	40	10	10	10	40	480	7,930
Motion picture/ video distributn	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	20	450
Motion picture projection	-	-	10	10	10	10	10	-	-	-	-	10	-	-	-	10	70	550
Radio and television activities	20	10	120	20	40	20	40	-	30	10	-	30	10	10	-	30	390	5,730
Artistic and literary creation	130	40	230	180	250	160	240	-	40	20	30	210	40	20	30	240	1,860	24,540
All Creative Industries	690	310	1,290	830	1,500	940	1,530	10	470	270	300	1,140	490	300	170	1,150	11,370	138,940
All Industries	8,310	7,220	17,680	21,910	32,880	18,320	27,410	210	8,020	6,940	6,250	22,730	9,640	6,840	5,030	20,800	220,190	2,392,910
All Cis as % All	8.3	4.3	7.3	3.8	4.6	5.1	5.6	4.8	5.9	3.9	4.8	5.0	5.1	4.4	3.4	5.5	5.2	5.8

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 10 units to prevent data disclosure

Importance of Bath and North East Somerset Creative Industries businesses compared to other Bath and North East Somerset Industries and Sectors

- 3.4** Table 3.1a shows how the volume of businesses in Bath and North East Somerset Creative Industries Sector ranks in terms of other Bath and North East Somerset sectors and industries.
- 3.5** The Table shows that, if the Creative Industries is viewed as a sector in its own right, then in business volume terms it would be the 5th = largest in Bath and North East Somerset.; the Sector has more businesses than Manufacturing, Transport and communications, Agriculture and Energy and water. The Sector has fewer businesses than Finance and business services, Distribution, hotels and restaurants, Construction and the Public sector.
- 3.6** There are also more businesses in the Creative Industries in Bath and North East Somerset than in Tourism.

Table 3.1a Bath and North East Somerset Creative Industries Business Volumes in relation to Other Industries and Sectors, 2007 (ranked in order, highest first)

Sector	Business Volumes	% of All Businesses
1 : Banking, finance and insurance, etc (SIC J,K)	3,000	36
2 : Distribution, hotels and restaurants (SIC G,H)	2,200	27
Retail sub-category of Distribution etc	1,000	12
3 : Construction (SIC F)	800	10
4 : Public administration, education & health (SIC L,M,N)	800	10
5= : Creative Industries	700	8
5= : Other services (SIC O,P,Q)	700	8
7 : Manufacturing (SIC D)	500	6
8 : Transport and communications (SIC I)	300	4
Tourism user-defined industry (SWRDA definition)	150	2
9 : Agriculture and fishing (SIC A,B)	0	0
10 : Energy and water (SIC C,E)	0	0
Total (All except Creative Industries)	8,300	100

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

Creative Industries Business Location Quotients

3.7 Location Quotients (LQs) show the degree of structural over-representation' or 'under-representation' on a particular indicator when compared against a benchmark area. In this instance, we have calculated Location Quotients for Bath and North East Somerset Creative Industries, and all other Upper Tier Authorities in the South West, using Great Britain as the benchmark (Table 3.2 below).

3.8 An LQ of 1.25 for a sub-sector or industrial activity suggests that the proportion of employing units as a percentage of all industries is 125% of the respective national proportion for that sub-sector or industry.

3.9 In summary:

- Bath and North East Somerset has 143% of the national representation across all Creative Industries in terms employing units. The highest in the region by a considerable margin.
- Bath and North East Somerset and Bristol are the only two Upper Tier economies in the South West to demonstrate over-representation in the Creative Industries. All other economies are either on par, or under-represented, when compared nationally
- Bath and North East Somerset has 275% of national representation in the Publishing of books and by far and away the highest representation in the sub-sector across the entire South West (the next highest LQ in the Publishing of books is Bristol with 166% the national representation)
- Bath and North East Somerset has 284% of national representation in the Publishing of journals. Again, by far and away the highest representation in the sub-sector across the entire South West (the next highest LQ in the Publishing of journals is Poole with 140% the national representation)
- Bath and North East Somerset has 190% of national representation in the publication of sound recordings. Again, the highest over-representation across the South West (the next highest is Bournemouth with 109%).
- Bath and North East Somerset has 261% of national average representation in Other publishing, again the highest degree of over-representation amongst any Upper Tier Authority in the South West (Bristol is next highest with 150% more units than expected if it had a similar industrial structure as nationally)
- Bath and North East Somerset has 131% national representation in Architectural and engineering activities and related technical consultancy. Again, the highest in the region (marginally above South Gloucestershire with 129%)
- Bath and North East Somerset has 153% the national representation in Advertising. The highest in the region (bar the very small economy of the Isles of Scilly).
- Bath and North East Somerset has 116% of national representation in Radio and television activities, the third highest in the region after Bristol (272%) and North Somerset (151%).
- Bath and North East Somerset has 156% of national representation in Artistic and literary creation, the main proxy activity for the 'Arts'. Again,

the highest representation across the region by a considerable margin (the next highest is Bristol with 124% the national average)

- 3.10** The analysis suggests that, in terms of its concentrations of Creative businesses, the Bath and North East Somerset workplace economy is by far and away the most creative economy within the South West. As well as leading the way in overall terms, Bath and North East Somerset holds the regional lead in a number of key sub-sectors of the Creative Industries: Publishing of books, journals, sound recordings and other publishing; Architectural and engineering activities and related technical consultancy; Advertising; and, Artistic and literary creation. Though not leading regionally, there is also evidence of above average representation in Bath and North East Somerset in Radio and television activities.

Table 3.2 A Location Quotient Analysis of Employing Units in SWRDA Defined Creative Industries across the South West Upper Tier Authorities and the South West, 2007 (Great Britain = 1.00)

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West
Publishing of books	2.75	1.02	1.66	0.74	1.14	0.84	1.37	0.00	0.81	1.17	1.17	1.51	0.76	0.36	0.81	1.57	1.22
Publishing of newspapers	1.01	0.77	1.11	0.77	0.94	1.53	0.82	0.00	0.70	1.61	0.89	0.74	0.29	0.82	0.56	0.54	0.88
Publishing journals etc	2.84	1.21	1.04	1.35	1.27	1.10	0.64	0.00	0.98	0.38	1.40	1.07	0.54	0.64	0.69	1.09	1.09
Publishing of sound recordings	1.90	1.09	0.78	0.27	0.42	0.65	0.00	0.00	0.25	0.28	0.32	0.78	0.20	0.58	0.39	0.66	0.52
Other publishing	2.61	1.00	1.50	0.95	1.10	1.05	1.23	0.00	0.60	0.00	1.29	0.96	0.67	0.47	0.96	1.39	1.11
Architectural/engineering	1.31	0.64	1.04	0.62	0.84	0.98	1.09	0.00	1.26	0.83	1.04	0.95	1.29	1.02	0.58	0.99	0.95
Advertising	1.53	1.44	1.11	0.56	0.67	0.67	0.90	1.72	0.92	0.54	0.74	0.65	0.61	0.71	0.71	0.74	0.79
Photographic activities	0.99	1.07	1.37	0.66	0.78	1.00	1.00	1.24	0.68	0.71	0.62	0.61	0.62	0.83	0.36	0.81	0.84
Motion picture/ video production	1.09	0.42	2.02	0.45	0.40	0.49	0.61	1.45	0.79	0.65	0.48	0.56	0.41	0.53	0.42	0.62	0.66
Motion picture/ video distributn	0.63	0.00	1.19	0.72	0.32	0.00	0.58	0.00	0.66	0.00	0.00	0.46	1.09	0.77	0.00	0.25	0.48
Motion picture projection	1.05	0.60	1.97	1.79	1.33	1.19	0.80	0.00	1.63	1.88	0.70	1.15	0.90	1.27	2.60	1.05	1.29
Radio and television activities	1.16	0.64	2.72	0.31	0.52	0.46	0.64	0.00	1.51	0.66	0.20	0.50	0.43	0.43	0.33	0.64	0.74
Artistic and literary creation	1.56	0.53	1.24	0.81	0.74	0.87	0.85	0.47	0.52	0.32	0.51	0.90	0.39	0.21	0.52	1.12	0.82
All Creative Industries	1.43	0.74	1.25	0.65	0.78	0.88	0.96	0.41	1.00	0.67	0.83	0.86	0.88	0.75	0.57	0.96	0.89

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

Employees

Employee volumes in the Creative Industries and percentage of All Industries

3.11 Table 3.3 shows employee volumes for the Creative Industries overall, and within each sub-category, for all Upper Tier South West authorities. Again regional and national data is also presented.

3.12 In summary:

- Bath and North East Somerset has 4,200 employees in the Creative Industries...
- ...1,800 of which are in Architectural and engineering activities and related technical consultancy and a further 1,000 are in Publishing of journals
- Creative Industries in Bath and North East Somerset account for 5.4% of all employees, the highest proportion amongst all Upper Tier Local Authorities in the South West of England by a considerable margin
- The next highest, Bristol, is some considerable way behind with 4.2% of total employees
- Bath and North East Somerset has more than twice as many employees concentrated in the Creative Industries than the South West regional concentration in the Sector
- Bath and North East Somerset has more than three times as much employment in the Creative Industries as Torbay and Wiltshire. It has around 44% of the employment level of the biggest regional Creative Industries economy of Bristol.
- Bath and North East Somerset representation of Creative Industries as a percentage of all employees is well above the national average of 3.0%.

Table 3.3 Employees in Employing Units in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	200	-	100	-	200	100	500	-	100	-	100	200	100	-	-	200	1,900	27,600
Publishing of newspapers	100	400	500	-	200	200	300	-	-	200	-	-	-	200	-	-	2,200	40,800
Publishing journals etc	1,000	200	500	400	600	100	300	-	100	-	200	300	100	-	-	200	3,900	56,200
Publishing of sound recordings	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	200	3,300
Other publishing	100	-	300	100	200	100	200	-	-	-	-	100	-	-	-	100	1,300	18,500
Architectural/engineering	1,800	500	4,400	1,500	4,300	2,300	3,300	-	1,200	1,000	600	3,200	2,600	1,500	200	1,600	30,000	366,400
Advertising	400	300	1,200	200	800	200	400	-	200	100	-	200	200	200	-	300	4,600	83,300
Photographic activities	-	100	200	1,000	200	200	200	-	-	100	100	100	-	200	-	100	2,500	25,700
Motion picture/ video production	-	-	400	-	100	-	100	-	-	300	-	100	-	-	-	100	1,300	21,200
Motion picture/ video distributn	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4,800
Motion picture projection	100	-	200	100	200	100	100	-	-	100	-	100	100	-	100	100	1,300	16,700
Radio and television activities	100	100	1,300	100	300	100	300	-	100	200	-	100	-	100	-	100	2,800	68,400
Artistic and literary creation	300	100	500	300	500	400	400	-	100	300	100	300	100	-	100	400	3,900	60,200
All Creative Industries	4,200	1,600	9,500	3,800	7,600	3,600	6,100	-	1,800	2,300	1,300	4,700	3,400	2,400	500	3,100	55,800	793,300
All Industries	78,300	77,900	227,000	195,800	296,900	150,000	255,700	1,000	72,000	107,400	68,800	208,900	133,400	112,300	47,900	180,600	2,213,800	26,420,100
All CIs as % All	5.4	2.1	4.2	1.9	2.6	2.4	2.4	0.0	2.5	2.1	1.9	2.2	2.5	2.1	1.0	1.7	2.5	3.0

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 100 employees to prevent data disclosure

Importance of Bath and North East Somerset Creative Industries businesses compared to other Bath and North East Somerset Industries and Sectors

- 3.13** Table 3.1a shows how the volume of employees in Bath and North East Somerset Creative Industries Sector ranks in terms of other Bath and North East Somerset sectors and industries.
- 3.14** The Table shows that, if the Creative Industries is viewed as a sector in its own right, then in employee volume terms it would be the 5th = largest in Bath and North East Somerset; the Sector has more businesses than Other services, Construction, Transport and communications, Energy and water and Agriculture. The Sector has fewer businesses than the Public sector, Distribution, hotels and restaurants, Finance and business services, and Manufacturing.
- 3.15** There are also more employees in the Creative Industries in Bath and North East Somerset than in Tourism.

Table 3.3a Bath and North East Somerset Creative Industries Employee Volumes in relation to Other Industries and Sectors, 2007 (ranked in order, highest first)

Sector	Employee Volumes	% of All Employees
1 : Public administration, education & health (SIC L,M,N)	28,000	36
2 : Distribution, hotels and restaurants (SIC G,H)	19,700	25
3 : Banking, finance and insurance, etc (SIC J,K)	13,800	18
Retail sub-category of Distribution etc	9,100	12
4 : Manufacturing (SIC D)	6,800	9
5 :Creative Industries	4,200	5
6 : Other services (SIC O,P,Q)	3,300	4
7 : Construction (SIC F)	3,000	4
8 : Transport and communications (SIC I)	2,400	3
9 : Energy and water (SIC C,E)	1,200	2
Tourism user-defined industry (SWRDA definition)	2,000	3
10 : Agriculture and fishing (SIC A,B)	100	0
Total (All except Creative Industries and sub-categories of Retail and Tourism user-defined)	78,300	100

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

Creative Industries Employee Location Quotients

3.16 Employee Location Quotients (LQs) show the degree of structural employee over-representation⁵ or 'under-representation' in a particular sub-category when compared against a benchmark area (Table 3.4):

- 178% of the national representation across all Creative Industries in terms of employees. The highest in the region by a considerable margin (Bristol is next with 140%).
- Bath and North East Somerset and Bristol are the only two Upper Tier economies in the South West to demonstrate over-representation in the Creative Industries. All other economies are either on par, or under-represented, when compared nationally
- Bath and North East Somerset has 232% of national representation in the Publishing of books and by far and away the highest representation in the sub-sector across the entire South West (the next highest LQ in the Publishing of books is Gloucestershire with 196% the national employee representation)
- Bath and North East Somerset has 600% of national representation in the Publishing of journals. Again, by far and away the highest representation in the sub-sector across the entire South West (the next highest LQ in the Publishing of journals is Poole with 132% the national representation). Bath and North East Somerset accounts for more than one quarter of all regional employment in the sub-sector.
- Bath and North East Somerset has 806% of national representation in the publication of sound recordings. Again, the highest over-representation across the South West. In fact, Bath and North East Somerset accounts for around half of all regional employment in the sub-sector.
- Bath and North East Somerset has 197% of national average representation in Other publishing, again the highest degree of over-representation amongst any Upper Tier Authority in the South West (Bristol is next highest with 172% more employees than expected if it had a similar industrial structure as nationally)
- Bath and North East Somerset has 169% of national representation in Architectural and engineering activities and related technical consultancy. Again, the highest in the region (significantly above the next highest – Bristol and South Gloucestershire – with 141% and 140% respectively)
- Bath and North East Somerset has 143% the national representation in Advertising. The second highest in the region after Bristol with 168% national representation.⁵
- Bath and North East Somerset has 141% of national representation in Motion picture projection (i.e. cinemas), the third highest in the region after Torbay, South Gloucestershire and Plymouth
- Bath and North East Somerset has 147% of national representation in Artistic and literary creation, the main proxy activity for the 'Arts'. Again, the highest representation across the region by a considerable margin (the next highest is Plymouth with 114% the national average)

⁵ The very small economy of the Isles of Scilly has been discounted from this analysis – it contains 1,000 employees across all its industries.

3.17 In summary, and in terms of its concentrations of Creative employees, the Bath and North East Somerset workplace economy is by far and away the most creative economy within the South West. As well as leading the way in overall terms, Bath and North East Somerset holds the regional lead in a number of key sub-sectors of the Creative Industries: Publishing of books, journals, sound recordings and other publishing; Architectural and engineering activities and related technical consultancy; and, Artistic and literary creation. There is also evidence of Bath and North East Somerset over-representation in Advertising and Cinema.

Table 3.4 A Location Quotient Analysis of Employees in SWRDA Defined Creative Industries across the South West Upper Tier Authorities and the South West, 2007 (Great Britain = 1.00)

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West
Publishing of books	2.32	0.17	0.45	0.21	0.71	0.60	1.96	0.00	0.90	0.18	1.19	1.03	0.90	0.14	0.30	0.84	0.82
Publishing of newspapers	1.11	2.91	1.30	0.03	0.54	0.86	0.66	0.00	0.04	1.37	0.08	0.06	0.05	1.31	0.54	0.10	0.65
Publishing journals etc	6.00	0.98	0.98	0.93	0.95	0.41	0.47	0.00	0.68	0.01	1.32	0.56	0.35	0.03	0.06	0.55	0.82
Publishing of sound recordings	8.06	0.62	0.25	0.17	0.27	0.70	0.00	0.00	0.22	0.15	0.12	0.58	0.18	0.14	0.51	0.63	0.58
Other publishing	1.97	0.37	1.72	0.55	1.16	0.52	1.18	0.00	0.91	0.00	0.52	0.42	0.21	0.15	0.30	0.73	0.81
Architectural/engineering	1.69	0.42	1.41	0.54	1.04	1.09	0.93	0.00	1.17	0.69	0.66	1.12	1.40	0.99	0.28	0.63	0.98
Advertising	1.43	1.08	1.68	0.28	0.81	0.36	0.50	3.71	0.71	0.25	0.21	0.32	0.50	0.64	0.26	0.47	0.66
Photographic activities	0.63	0.69	0.85	5.42	0.69	1.03	0.74	3.01	0.46	0.49	1.85	0.48	0.21	1.54	0.28	0.72	1.16
Motion picture/ video production	0.69	0.21	2.22	0.24	0.34	0.32	0.65	2.44	0.56	2.93	0.20	0.39	0.30	0.23	0.21	0.53	0.71
Motion picture/ video distributn	0.07	0.00	0.22	0.14	0.13	0.00	0.13	0.00	0.08	0.00	0.00	0.08	0.29	0.15	0.00	0.06	0.11
Motion picture projection	1.41	0.91	1.37	1.11	0.81	0.67	0.52	0.00	0.99	1.45	0.00	0.80	1.59	0.49	1.95	0.48	0.91
Radio and television activities	0.25	0.52	2.21	0.26	0.40	0.15	0.47	0.00	0.29	0.75	0.02	0.21	0.12	0.32	0.03	0.11	0.50
Artistic and literary creation	1.47	0.39	0.91	0.72	0.71	1.04	0.73	0.86	0.76	1.14	0.78	0.61	0.23	0.09	1.08	1.09	0.77
All Creative Industries	1.78	0.67	1.40	0.65	0.85	0.80	0.80	0.62	0.85	0.70	0.61	0.75	0.84	0.71	0.35	0.57	0.84

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 100 employees to prevent data disclosure

Self-Employment

Self-employment volumes in the Creative Industries and percentage of All Industries

- 3.18** Table 3.5 shows self-employment volumes for the Creative Industries overall, and within each sub-category, for all Upper Tier South West authorities. Regional and national data are also presented.
- 3.19** In summary:
- Bath and North East Somerset has an estimated 2,500 self-employed individuals in the Creative Industries...
 - ...almost half (1,200) of which are in Artistic and literary creation and 800 are in Architectural and engineering activities and related technical consultancy
 - Around 18% of Bath and North East Somerset self-employment is in the Creative Industries, a far higher proportion than regionally (11%) and nationally (15%) but slightly lower than Plymouth (21%) and Bristol (20%)
- 3.20** The Creative Industries in Bath and North East Somerset make a very significant contribution towards self-employment in the area, particularly through the provision of self-employment opportunities for those in Artistic and literary creation and Architects and engineers.

Table 3.5 Self-Employment in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	-	-	-	-	100	-	100	-	-	-	-	100	-	-	-	-	500	6,900
Publishing of newspapers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	100	1,800
Publishing journals etc	200	-	100	100	100	-	100	-	-	-	-	100	-	-	-	-	800	11,400
Publishing of sound recordings	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other publishing	-	-	100	-	-	-	-	-	-	-	-	-	-	-	-	-	200	3,500
Architectural/engineering	800	200	1,900	600	1,800	1,000	1,400	-	500	400	300	1,400	1,100	700	100	700	12,700	155,700
Advertising	100	100	500	100	300	100	200	-	100	-	-	100	100	100	-	100	1,800	32,400
Photographic activities	100	100	400	2,000	400	300	400	-	100	100	200	200	100	300	-	200	4,900	50,100
Motion picture/ video production	-	-	200	-	-	-	100	-	-	100	-	-	-	-	-	-	600	9,500
Motion picture/ video distributn	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Motion picture projection	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Radio and television activities	-	-	400	-	100	-	100	-	-	100	-	-	-	-	-	-	1,000	23,600
Artistic and literary creation	1,200	300	2,100	1,400	2,200	1,600	1,900	-	600	1,300	600	1,300	300	100	500	2,000	17,300	270,300
All Creative Industries	2,500	800	5,700	4,300	5,000	3,000	4,200	-	1,300	2,000	1,200	3,100	1,600	1,200	700	3,200	39,900	565,300
All Industries	14,100	10,200	27,700	48,500	60,700	31,300	40,900	-	14,600	9,600	8,100	39,900	15,200	9,500	10,600	33,300	374,200	3,693,300
All CI as % All Self-Employment	17.8	8.0	20.4	8.9	8.3	9.7	10.4	-	8.6	21.0	14.2	7.9	10.7	13.0	6.3	9.5	10.7	15.3

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 100 self-employed to prevent data disclosure

Total Employment

Total employment volumes in the Creative Industries and percentage of All Industries

- 3.21** Table 3.6 shows total employment volumes for the Creative Industries overall, and within each sub-category, for all Upper Tier South West authorities. Regional and national data are also presented.
- 3.22** In summary:
- Bath and North East Somerset has estimated total employment of 6,700 individuals in the Creative Industries...
 - ...almost two fifths (39%) of which are in Architectural and engineering activities and related technical consultancy and a fifth (21%) are in Artistic and literary creation. Around 18% are involved in the Publishing of journals and a further 7% are involved in Advertising.
 - Around 8% of Bath and North East Somerset total employment is in the Creative Industries, a far higher proportion than regionally (4%) and nationally (5%).
 - Bath and North East Somerset contribution to total employment is by far and away the highest proportion to be found amongst the region's authorities. Bristol, the next highest, lags Bath and North East Somerset by almost two full percentage points (Bristol's Creative Industry contribution to self-employment is 6.5%).
- 3.23** It is clear that the Creative Industries in Bath and North East Somerset make a very significant contribution towards employment in the area. In particular, through employment opportunities in:
- Architects and engineers.
 - Artistic and literary creation
 - Publishing of journals
 - Advertising

Table 3.6 Total Employment in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	200	-	100	100	300	100	700	-	100	-	100	300	200	-	-	200	2,400	34,500
Publishing of newspapers	100	400	500	-	300	200	300	-	-	200	-	-	-	200	-	-	2,300	42,600
Publishing journals etc	1,200	200	600	500	700	200	300	-	100	-	200	300	100	-	-	300	4,700	67,600
Publishing of sound recordings	100	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	200	3,300
Other publishing	100	-	300	100	300	100	300	-	100	-	-	100	-	-	-	100	1,500	22,000
Architectural/engineering	2,600	700	6,300	2,100	6,100	3,200	4,700	-	1,700	1,500	900	4,600	3,700	2,200	300	2,200	42,700	522,100
Advertising	500	400	1,700	200	1,100	200	600	-	200	100	100	300	300	300	100	400	6,400	115,800
Photographic activities	100	200	600	3,000	600	400	500	-	100	200	400	300	100	500	-	400	7,400	75,900
Motion picture/ video production	100	-	600	100	100	100	200	-	-	400	-	100	-	-	-	100	1,800	30,600
Motion picture/ video distributn	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4,800
Motion picture projection	100	-	200	100	200	100	100	-	-	100	-	100	100	-	100	100	1,300	16,700
Radio and television activities	100	100	1,700	200	400	100	400	-	100	300	-	200	100	100	-	100	3,800	92,000
Artistic and literary creation	1,400	400	2,600	1,800	2,600	2,000	2,300	-	700	1,500	700	1,600	400	100	600	2,500	21,200	330,600
All Creative Industries	6,700	2,400	15,200	8,100	12,600	6,600	10,300	-	3,100	4,300	2,400	7,800	5,000	3,600	1,200	6,300	95,700	1,358,600
All Industries	80,800	78,700	232,700	200,100	301,900	153,000	260,000	1,000	73,200	109,400	70,000	212,100	135,000	113,600	48,500	183,700	2,253,700	26,985,400
All Cis as % All	8.3	3.0	6.5	4.1	4.2	4.3	4.0	0.0	4.2	3.9	3.4	3.7	3.7	3.2	2.4	3.4	4.2	5.0

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 100 in employment to prevent data disclosure

Total Enterprises

Total enterprise volumes in the Creative Industries and percentage of All Industries

3.24 Table 3.7 shows estimates of total enterprises in the Creative Industries. An 'Enterprise' is defined here as employing organisations / businesses and self-employed individuals. Please note that almost 80% of enterprises fall into the latter category and that many of these smaller enterprises will not be registered companies or registered for VAT.

3.25 In summary:

- Bath and North East Somerset has an estimated 3,200 total enterprises in the Creative Industries...
- ...just over two fifths (41%) of which are in Artistic and literary creation and just over one third (34%) are in Architectural and engineering activities and related technical consultancy
- Around 14% of Bath and North East Somerset total enterprises are in the Creative Industries, a far higher proportion than regionally (9%) and somewhat higher than nationally (12%).
- With the exception of Bristol with 1% of total enterprises in All industries, Bath and North East Somerset contribution to total enterprises is the highest proportion to be found amongst the region's authorities.

3.26 The Creative Industries in Bath and North East Somerset make a very significant contribution towards enterprise in the area. In particular, through enterprise opportunities for Artistic and literary creation and Architects and engineers.

Table 3.7 Total 'Enterprises' in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	80	10	60	30	100	40	180	-	30	20	30	100	40	10	10	80	810	9,850
Publishing of newspapers	10	20	30	10	20	20	20	-	-	10	-	10	-	10	-	10	170	2,650
Publishing journals etc	230	40	120	110	170	50	70	-	30	-	50	80	30	10	10	70	1,060	14,150
Publishing of sound recordings	10	-	10	-	10	10	-	-	-	-	-	10	-	-	-	10	60	1,210
Other publishing	50	10	80	40	90	30	80	-	10	-	10	40	10	10	10	50	540	6,480
Architectural/engineering	1,080	320	2,390	990	2,590	1,460	2,230	-	780	590	450	1,980	1,440	850	160	1,240	18,570	222,110
Advertising	210	160	580	140	420	140	290	10	100	50	40	170	110	110	40	190	2,760	45,790
Photographic activities	130	130	460	2,070	490	360	470	10	80	120	260	240	80	350	30	310	5,580	59,420
Motion picture/ video production	50	20	300	50	80	50	110	-	40	130	10	70	30	20	10	80	1,040	17,400
Motion picture/ video distributn	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	20	450
Motion picture projection	-	-	10	10	10	10	10	-	-	-	-	10	-	-	-	10	70	550
Radio and television activities	40	50	560	60	150	40	150	-	50	80	-	70	20	40	10	50	1,370	29,330
Artistic and literary creation	1,310	350	2,340	1,620	2,410	1,770	2,150	10	600	1,270	580	1,520	350	120	560	2,240	19,200	294,860
All Creative Industries	3,190	1,120	6,950	5,140	6,540	3,970	5,770	30	1,730	2,290	1,450	4,280	2,120	1,530	830	4,330	51,240	704,240
All Industries	22,410	17,420	45,380	70,410	93,580	49,620	68,310	210	22,620	16,540	14,350	62,630	24,840	16,340	15,630	54,100	594,390	6,086,210
All Cis as % All	14.3	6.4	15.3	7.3	7.0	8.0	8.4	12.2	7.6	13.8	10.1	6.8	8.5	9.4	5.3	8.0	8.6	11.6

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009

All data rounded to nearest 10 units to prevent data disclosure

Total Turnover

Total turnover volumes in the Creative Industries and percentage of All Industries

3.27 Table 3.8 shows estimates of turnover in the Creative Industries.

3.28 In summary:

- Bath and North East Somerset has an estimated total turnover from the Creative Industries of £782 million per annum...
- ...just over one third (35%) of turnover derives from Architectural and engineering activities and related technical consultancy, one fifth from Artistic and literary creation and 18% from Publishing of journals and 14% from Advertising
- Around 7% of South West turnover in the Creative Industries is generated by enterprises in Bath and North East Somerset

Table 3.8 Total Turnover in SWRDA Defined Creative Industries across the South West Upper Tier Authorities, the South West and Great Britain, 2007

	Bath and North East Somerset	Bournemouth	Bristol, City of	Cornwall	Devon	Dorset	Gloucestershire	Isles of Scilly	North Somerset	Plymouth	Poole	Somerset	South Gloucestershire	Swindon	Torbay	Wiltshire	South West	Great Britain
Publishing of books	31.2	2.3	17.4	6.9	36.2	15.4	86.1	0.0	11.2	3.3	14.1	37.1	20.5	2.8	2.5	26.1	313.1	4,542.0
Publishing of newspapers	16.7	43.7	57.0	1.2	31.1	24.9	32.7	0.0	0.5	28.3	1.1	2.4	1.4	28.4	5.0	3.4	277.7	5,092.7
Publishing journals etc	140.8	22.8	66.6	54.4	84.8	18.4	36.1	0.0	14.6	0.4	27.2	35.2	13.9	1.0	0.8	29.6	546.5	7,913.3
Publishing of sound recordings	15.5	1.2	1.4	0.8	2.0	2.6	0.0	0.0	0.4	0.4	0.2	3.0	0.6	0.4	0.6	2.8	31.6	648.4
Other publishing	9.2	1.7	23.3	6.4	20.6	4.7	18.0	0.0	3.9	0.0	2.1	5.2	1.7	1.0	0.9	7.9	106.6	1,578.3
Architectural/engineering	270.9	67.6	653.3	214.2	632.5	332.9	486.9	0.0	172.4	150.7	93.4	477.1	380.5	227.3	27.3	231.9	4,418.8	53,974.8
Advertising	110.0	82.5	373.8	54.8	237.4	53.6	124.6	3.7	50.5	26.8	14.0	65.7	65.4	70.4	12.5	83.5	1,429.4	25,960.9
Photographic activities	7.9	8.6	30.9	169.8	32.6	24.7	30.4	0.5	5.3	8.4	20.4	16.0	4.4	27.6	2.1	20.7	410.2	4,230.8
Motion picture/ video productin	6.3	1.9	59.0	5.6	11.8	5.6	19.4	0.3	4.7	36.8	1.6	9.5	4.7	3.1	1.2	11.3	182.7	3,091.0
Motion picture/ video distributn	0.4	0.0	3.4	1.9	2.6	0.0	2.2	0.0	0.4	0.0	0.0	1.1	2.6	1.1	0.0	0.7	16.1	1,810.0
Motion picture projection	4.2	2.7	11.8	8.2	9.1	3.8	5.1	0.0	2.7	5.9	0.0	6.3	8.1	2.1	3.6	3.3	76.8	1,004.0
Radio and television activities	11.1	23.2	286.9	29.4	68.1	13.0	69.0	0.0	11.9	46.2	0.9	25.6	8.8	20.6	0.9	11.5	627.3	15,122.6
Artistic and literary creation	157.6	41.9	282.8	192.3	288.2	213.9	255.2	1.2	74.3	167.2	73.7	174.3	41.3	14.4	70.7	267.8	2,315.6	36,095.1
All Creative Industries	781.7	300.1	1,867.7	745.9	1,456.9	713.6	1,165.6	5.7	352.7	474.4	248.8	858.6	554.0	400.2	127.9	700.5	10,752.4	161,063.9

Source: Adapted from Annual Business Inquiry, National Statistics from Nomis website: www.nomisweb.co.uk, 2009
All data rounded to nearest 10 units to prevent data disclosure