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Scottish Enterprise

Creative Clyde Baseline Report

Final Report | January 2012

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APPENDICES

EXECUTIVE SUMMARY

Roger Tym & Partners (RTP), part of Peter Brett Associates LLP, has prepared a scoping and baseline study of Creative Clyde on behalf of Scottish Enterprise (SE). Creative Clyde is a creative industries and digital media location[1], development project and industry grouping.

Creative Clyde is a long term partnership between public organisations and the private sector to establish Glasgow and Scotland as an internationally recognised location for creative industries. The project aims to build on Glasgow's growing status as a hub for the creative industries, delivering new jobs and economic growth for the city. The Strategic Development Group (SDG) acts as the custodians of the Creative Clyde vision and sets out the strategy and direction of the project. Membership of SDG currently includes SE, Glasgow City Council, Creative Scotland, BBC Scotland, University of Glasgow, SECC, STV and Raise the Roof Productions.

RTP Survey

An online survey was designed to gather information on companies identified by SE and RTP. The results are as follows:

- 63 companies responded to the survey (a 22% participation rate).
- The majority (76%) are creative businesses. Just under half (44%) are based in the core Creative Clyde location with the rest elsewhere in Glasgow.
- The majority (69%) of creative businesses that responded to the survey are outside the core Creative Clyde location.[2] 31% (14) of the businesses are creative *and* located within the core Creative Clyde location.
- Creative businesses responding to the survey employ 1,880 people. Their employment levels have increased marginally (5%) over the last three years but more than doubled in the last five years (136%).
- When information on SE account managed companies is added, there are 2,604 employees in creative businesses in Glasgow.
- Based on the survey and SE account managed company information, annual turnover in creative businesses in Glasgow is estimated to be over £140 million.

Database Information

RTP also assessed information on job and company numbers using online databases, including the Annual Business Inquiry (ABI), Focus Net and a database provided by SE. None of these databases are exhaustive, and each covers different geographical areas. However, they help to gauge the relative size of creative industries within the core Creative Clyde location and across Glasgow.

In the core Creative Clyde area there are around 2,300 jobs in some 40 companies in creative industries[3], representing around 20% of the total jobs in this location. The number

[1] A map of the core Creative Clyde area is included at Appendix 1.
[2] A large number of Creative Companies outwith the Creative Clyde core location, but within Glasgow were invited to take part in the survey (business survey list was supplied and approved by SE)

of jobs has increased three-fold since 2006. The survey we carried out covered 14 (31%) of these companies, with a further 5 already providing information in their position as Scottish Enterprise account managed companies.

There are around 16,000 jobs in creative industries across Glasgow, some 4% of all jobs in the city.

Table E1.1 Summary Table

Location	Jobs	Data Source	Companies	Employees
Core Creative Clyde location	Creative Industries	Focus	22	2,264
		ABI – wider	90	4,200
		ABI - narrower	40	2,300
	Total Sectors	Focus	114	3,820
		ABI	390	10,900
Glasgow	Creative Industries	Focus	870	14,858
		ABI – wider	3,400	43,700
		ABI - narrower	1,400	16,000
	Total	ABI	20,800	413,500

Source: ABI, www.focusnet.com, RTP

It is difficult to give a definitive figure for ‘creative industries’ as it is dependent upon which industries are included within the creative industry definition. Even if a definition is selected, some companies in the same industry will be creative whilst others will not.

Future Monitoring Options

There are a number of different monitoring options for future years, which include:

- Annual updates based on the survey and population used this year.
- Annual updates of the ABI and FocusNet analysis.
- Annual updates from companies who are sent a copy of the previous year’s information to update.
- Survey response requests sent via Twitter, Facebook, and SE and partner organisations’ websites.
- As an incentive, companies could be sent links or graphics for their websites, which show estimated GVA[4] for their company.

[3] This takes a narrow definition of jobs in creative industries using ABI sectors, which only includes a proportion of jobs in some sectors to account for the fact that not all jobs in a sector will be ‘creative’. The wider definition using ABI sectors includes a large number of people working in Art and Antiques, which the SIC definition defines to be ‘other retail sales in specialised stores’ and ‘retail sale of second-hand goods in stores’. We feel the narrower definition is more appropriate to the Creative Clyde location, as the aims of Creative Clyde are more aimed at digital media companies etc rather than retail.

[4] The concept of Gross Value Added (GVA) is the main way of assessing the economic impact of Scottish Enterprise interventions. GVA is an indicator of wealth creation and measures the contribution to the economy of each individual producer, industry or sector in the UK

1 INTRODUCTION

1.1 Roger Tym & Partners (RTP hereafter), part of Peter Brett Associates LLP, has prepared a scoping and baseline study of Creative Clyde on behalf of Scottish Enterprise (SE hereafter). Creative Clyde is a creative industries and digital media location[5], development project and industry grouping.

1.2 The key objective of the study is to update economic impact information for the core Creative Clyde location and the wider Creative Clyde project and to establish a monitoring and evaluation framework.

1.3 The report is structured as follows:

- Chapter 2 – Desktop Review of Project Background and Key Documents.
- Chapter 3 – Methodology.
- Chapter 4 – Survey Results.
- Chapter 5 – Estimates of Jobs in Creative Industries.
- Chapter 6 – Monitoring and Evaluation Recommendations.

[5] A map of the location, as agreed with SE, is set out in Appendix 1.

2 DESKTOP REVIEW

2.1 SE has been involved in the redevelopment of the Pacific Quay area for nearly 20 years. A review of related reports and strategies has been carried out to provide some of the historical context to this work.

Creative Clyde

Project Background

2.2 Creative Clyde is a long term partnership between public organisations and the private sector to establish Glasgow and Scotland as an internationally recognised location for creative industries. The project aims to build on Glasgow's growing status as a hub for the creative industries, delivering new jobs and economic growth for the city. The Strategic Development Group (SDG) acts as the custodians of the Creative Clyde vision and sets out the strategy and direction of the project. Membership of SDG currently includes SE, Glasgow City Council, Creative Scotland, BBC Scotland, University of Glasgow, SECC, STV and Raise the Roof Productions.

2.3 Creative Clyde has also been identified as a key driver for achieving the Scottish Digital Media Industry Advisory Group's strategy for long-term, sustainable growth for Scotland's digital media industries. The project aims to build on the success of the Digital Media Quarter and help Scotland become recognised as a serious player within the global digital environment.

2.4 SE's vision for the Creative Clyde area is 'A vibrant, colourful and inspiring riverside community for media, technology and 'creatively-minded' businesses to work, socialise or live. Where originality of thought flourishes and great ideas are shared and enjoyed. Its unique character and buzz is renowned and captures the imagination of organisations throughout the UK and internationally.'

Location

2.5 The core Creative Clyde location expands to both sides of the Clyde at Pacific Quay and includes the SECC, Clyde Auditorium, Scottish Hydro Arena and Riverside Museum. Appendix 1 shows the core Creative Clyde boundary[6]. The wider Creative Clyde community extends to creative businesses and clusters located in the city centre and throughout Glasgow.

Glasgow Science Centre and Pacific Quay: Monitoring Report, January 2007 – December 2007

2.6 This report provides the findings of the performance monitoring of the Glasgow Science Centre (GSC) and Pacific Quay project. The GSC project area extends to all developments on the Pacific Quay site. The monitoring work was required to show progress against a set of targets following a successful application for European Regional Development Fund (ERDF) support for 32.6% of the cost of the project.

[6] Core Creative Clyde boundary agreed with Scottish Enterprise

2.7 The assessment covered the period January 2007 to December 2007 and found:

- Employment targets were well ahead of target (370% of target).
- Visitor numbers were also ahead of target (105-114% of target).

2.8 The report identifies Film City Glasgow and the Digital Media and Business Centre as projects within the study area being supported by separate ERDF funding. The outputs and impacts from these projects are not included in the monitoring report. However the report states ‘it would seem reasonable to cite Pacific Quay as the catalyst for this type of development within this part of the city as both projects are designed to support creative industries companies.’

Digital Inspiration, December 2009

2.9 Digital Inspiration is the strategy for Scotland’s digital media industry (produced by the Scottish Digital Media Industry Advisory Group). The strategy’s vision is ‘to achieve a step change in Scotland’s global reputation in digital media’. The strategy provides market analysis, identifies strengths and weaknesses of the Scottish digital media sector and provides key recommendations for the sector’s development.

2.10 Scotland’s digital media sector’s strengths, weaknesses, opportunities and threats are summarised as follows:

Strengths	**Weaknesses**
• Good company base with leading business key segments • Research strength in games informatics and digital design • Strategy focus • Industry leadership • Reputation for creative excellence	• Not enough large companies • Weak presence in distribution • Limited focus for content topics • Low ambitions for growth in many companies • Lack of specialist investors • Poor connections between research and company base
Opportunities	**Threats**
• Infrastructure investment • Next generation technologies • Barriers to market low • Digitally sophisticated customers • Links to exploit digital media in other industries • Regional spend targets for broadcasting	• Other nations and regions investing heavily in the sector • Lack of supply and good propositions • Distribution and large companies not embedded in the local economy • Talent competition

Source: Digital Inspiration

2.11 The strategy makes the following recommendations to help the digital media sector achieve its full potential:

- Increase the number and scale of digital media companies.
- A national drive to increase the volume and the value of innovative digital media platforms owned or managed from Scotland.

- A greater and more profitable role for Scottish companies in the chain of distribution and interactivity.
- A more sophisticated understanding of the value to be derived from digital media as a growing and evolving business sector.
- A greater commitment to improving the performance of companies in the creative 'value chain'.
- Much more profitable leverage of intellectual property rights.
- Launch a pilot programme of tax and fiscal benefits to support the Dundee games sector.
- Generate greater investor awareness of digital media as a growth sector and greater investor readiness on the part of emergent companies.
- Calculate a more ambitious national culture of acquisition, allowing Scottish companies to buy and not always be bought.

Creative Clyde Operational Framework Paper, March 2010

2.12 This document outlines the background to the Pacific Quay location and SE's strategic vision for Creative Clyde at the time. This vision has since been updated.

2.13 SE's strategy for delivering the vision for Creative Clyde is to 'develop further our partnership approach and ensure the project becomes important for SE, Glasgow and Scotland. The following organisational themes have been established to support the strategy:

- **Create a location**
  - Establish a Creative Clyde partnership to collectively maximise the opportunity
  - Agree shared vision
  - Develop and promote the narrative – the Creative Clyde value proposition
  - Brand and build a sense of place
- **Build and manage the cluster**
  - Retain and build on the current strong 'anchors' and 'magnets'
  - Recruit additional enterprises
  - Strengthen the fragile ones
  - Build the cluster from the bottom up as well as top down
  - Reinforce the role as virtual hub – engage with Digital Markets and wider Creative industries, businesses and clusters throughout Scotland
- **Physical development**
  - Ubiquitous next generation connectivity
  - Facilitate development of key services, amenities and facilities required for the growth of the cluster
  - Further masterplanning to ensure appropriate physical development and ladder of communication

Pacific Quay Masterplan, June 2011

2.14 The Pacific Quay masterplan framework is set within the context of the wider Creative Clyde initiative and aims to extend Scottish Enterprise's aim of delivering a vibrant centre for media, technology and creatively minded businesses. The strategy approaches place-making within a flexible framework that facilitates small incremental phases of development.

3 METHODOLOGY

3.1 An online survey was designed to gather information on companies identified by SE and RTP. The survey list included companies from:

- A list provided by SE which included a number of companies inside the core Creative Clyde location as well as some businesses outside the core location. These were mainly creative industries/digital media companies.
- A list of companies from the FocusNet database, using postcodes matched as closely as possible to the core Creative Clyde area.
- Additional digital media companies listed in *A Review of the Digital Media Quarter Opportunity at Pacific Quay, Glasgow,* (New Media Partners, September 2009).
- A site visit to the core Creative Clyde area to ensure the list was as comprehensive as possible. A number of companies were also contacted and encouraged to respond to the survey in the process.

3.2 Duplicate companies were removed from the lists, as were some of SE's account managed companies, as SE already had sufficient information from these companies. Other contacts were removed from SE's list who were not appropriate to the survey e.g. academics and Councillors. This left a list of 328 companies.

3.3 As far as possible, email addresses were found for every company, using a combination of personal contacts, online searches and telephoning the company (where telephone numbers were available).

3.4 Through this process, several companies were eliminated from the list as they had ceased to trade as companies or changed their name and were duplicates on the list (9) or their contact details (telephone or email) could not be obtained (22). The email was bounced by several companies' systems. The companies were contacted by telephone where possible to obtain alternative addresses, but emails still failed to get through (11). 21 companies declined to be involved as they were not interested or were located outside Glasgow. Companies that did not respond to the online survey invitation were contacted a second time with a reminder email. They were also contacted by telephone where possible.

3.5 A total of 286 companies were contacted. 63 companies responded and completed the survey (a 22% response rate). 21 companies responded but declined to take part in the survey. Including these companies, the overall response rate was 29.3%.

3.6 A breakdown of the number of companies contacted and the survey response rate is provided in Table 3.1. A copy of the survey template is provided in Appendix 2.

Table 3.1 Companies Contacted

	Companies	Response rate
Total companies on initial list	**328**	
No telephone number or email	22	
Email addresses bounced	11	
Ceased to trade as companies/duplicates	9	
Total companies attempted to contact	**286**	
Positive responses (participation rate)	63	22.0%
Declined to be involved	21	7.3%
Total responses (response rate)	**84**	**29.3%**

4 SURVEY RESULTS

4.1 The business survey received a 22.0% participation rate, which is a reasonable response for an online survey of this nature.

4.2 The survey results and data tables set out below provide information at the following distinct levels[7]:

- "**Creative businesses**" (including the core Creative Clyde area, and those outside it but within Glasgow);
- "**Inside core**" (all businesses within the core Creative Clyde location);
- "**Outside core**" (creative businesses[8] outside the core Creative Clyde area but within Glasgow); and
- "**All respondents**" (all business survey respondents).

Business Location

4.3 Just under half (44%) of all respondents are based in the core Creative Clyde area with the remainder located elsewhere in Glasgow. The majority (69%) of responding creative businesses are outside the core Creative Clyde location.[9] 31% of business respondents are creative *and* located within the core Creative Clyde location.

Table 4.1: Businesses in Creative Clyde Area

	Creative businesses		Inside core		Outside core		All respondents	
	No.	%	No.	%	No.	%	No.	%
Yes, inside core	14	31%	28	100%	0	0%	28	44%
No, outside core	31	69%	0	0%	35	100%	35	56%
Total	45	100%	28	100%	35	100%	63	100%

Source: RTP Creative Clyde Survey (2011)

Awareness of Creative Clyde Concept

4.4 All respondents report a reasonably good awareness of the Creative Clyde concept. Businesses outside the Creative Clyde core location report considerably greater awareness of Creative Clyde as a location, programme and industry grouping compared to those within the core location. In the core area all businesses, including creative and other businesses, were included in the survey. Outside the core, the survey was restricted to creative industry businesses. Creative sector businesses outside the Creative Clyde area could therefore be expected to have a high level of awareness of the area concept.[10]

[7] The second and third categories sum to make the fourth category.

[8] 2 of the 35 respondents from outside the core did however select a non-creative business activity.

[9] This reflects the high number of creative businesses outwith the core Creative Clyde location that were invited to take part in the survey (business list supplied and approved by SE).

[10] 94% of business respondents outside the core were creative compared to 54% inside the core.

Table 4.2: Awareness of Creative Clyde (responding 'yes')

	Creative businesses		Inside core		Outside core		All respondents	
	No.	%	No.	%	No.	%	No.	%
As a location	33	75%	12	44%	28	82%	40	66%
As an industry body	26	58%	10	36%	21	62%	31	50%
As a programme	29	66%	10	38%	24	71%	34	57%

Source: RTP Creative Clyde Survey (2011)

Main Business Activity

4.5 All respondents were asked to indicate their main business activity and were provided with a list of standard creative business activities from the Scottish Government definition. While some businesses provided an 'other' activity, many of those provided are still considered a creative business activity.[11]

4.6 Table 4.3 shows the concentration of creative businesses in each category and the breakdown by sector. A little over half (54%) of business respondents in the Creative Clyde area are creative businesses while almost all business respondents (94%) outside the core were creative. Over three quarters (76%) of all business respondents were creative businesses.

4.7 Around a third (31%) of creative business respondents listed either TV or radio as their main business activity while around a quarter (27%) listed film. A small proportion (13%) list another creative business activity.[12]

4.8 A large proportion of business respondents within the core said they are involved in 'other' business activities. However only a few of these could be considered to be within the creative industry sector[13].[14] In total over half of business respondents within the core location are creative businesses (54%).

[11] In some cases businesses selected a combination of creative business activities i.e. Film & TV.
[12] Film & TV and radio (2 respondents); transmedia; 3D visualisation; television and multiplatform content and exhibition and conference venue
[13] Creative businesses include: 3D visualisation; broadcast appeal and grant making; exhibition and conference venue.
[14] 'Other' responses include: manufacturing; consulting engineers; managing hotels; insurance; health care; childcare; charity; managed workspace; recruitment; social care provision; travel; and air conditioning; community activities.

Table 4.3: Main Business Activity

	Creative businesses		Inside core		Outside core		All respondents	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Creative businesses[15]	45	100%	15	54%	33	94%	48	76%
Non-creative	0	0%	13	46%	2	6%	15	24%
Breakdown by sector[16]								
Advertising	0	0%	0	0%	0	0%	0	0%
Architecture	0	0%	0	0%	0	0%	0	0%
Arts and antiques	1	2%	0	0%	1	3%	1	2%
Crafts	0	0%	0	0%	0	0%	0	0%
Design	4	9%	2	7%	2	6%	4	6%
Designer fashion	0	0%	0	0%	0	0%	0	0%
Entertainment and leisure	1	2%	0	0%	1	3%	1	2%
Film	12	27%	2	7%	10	29%	12	19%
Interactive leisure software	1	2%	0	0%	1	3%	1	2%
Music	2	4%	0	0%	2	6%	2	3%
Performing arts	0	0%	0	0%	0	0%	0	0%
Publishing	1	2%	0	0%	1	3%	1	2%
Retail	0	0%	1	4%	0	0%	1	2%
Software and computer services	3	7%	1	4%	2	6%	3	5%
TV and radio	14	31%	6	21%	8	23%	14	22%
Other responses	6	13%	16	57%	7	20%	23	37%
Total	45	100%	28	100%	35	100%	63	100%

Source: RTP Creative Clyde Survey (2011)

Employment

4.9 There are 1,880 employees in creative businesses responding to the survey. Their employment level has increased marginally (5%) over the last three years but has more than doubled in the last five years (136%). There are 1,992 employees in total from the business respondents within the core Creative Clyde location and these companies have experienced a similar rate of increase over the last three and five year periods (5% and 142% respectively).

4.10 Employment levels within Scottish Enterprise account managed creative businesses[17] have been added to the employment table below. Employment in the core Creative Clyde area stands at 2,170, and 5,545 in the 'Outside core' area.

[15] Includes creative businesses that answered 'other' business activity but can still be considered creative.
[16] Scottish Government standard definition of creative businesses.
[17] Note: account managed firms were not invited to participate in the business survey.

Table 4.4: Known Employment

	Creative businesses	Inside core	Outside core	All respondents
2006	738	779	4,594	5,373
2008	1,784	1,835	5,200	7,035
2011	**1,880**	**1,922**	**5,069**	**6,991**
SE account managed creative businesses	724	248	476	724
Total known employment	**2,604**	**2,170**	**5,545**	**7,715**

Source: RTP Creative Clyde Survey (2011) & Scottish Enterprise

4.11 Table 4.5 shows the level of known employment in creative businesses inside and outside the core Creative Clyde area. Creative employment in SE account managed businesses outside the Creative Clyde location is almost twice the level of employment inside the core. However 71% of creative business employment is located inside the core Creative Clyde area.

Table 4.5: Known Employment in Creative Businesses Inside and Outside Core

	Creative businesses			
	Inside core	Outside core	Total	Inside as % of total
2006	502	236	738	68%
2008	1,532	252	1,784	86%
2011	**1,610**	**270**	**1,880**	86%
SE account managed creative businesses	248	476	724	34%
Total known employment	**1,858**	**746**	**2,604**	71%

Source: RTP Creative Clyde Survey (2011) & Scottish Enterprise

4.12 The majority of workers in creative businesses and other businesses inside the core location are full-time employees. Business survey respondents outside the core Creative Clyde location report a more even balance between the number of full-time and part-time employees.

4.13 A non-creative business respondentoutside the core Creative Clyde area with a large number of employees (3,500) could not provide any detail on the split between full-time and part-time employees or occupational group.

Table 4.6: Split between Full-Time & Part-Time Workers

	Creative businesses	Inside core	Outside core*	All respondents
Full-time %	83%	84%	58%	73%
Part-time %	17%	16%	42%	27%

Source: RTP Creative Clyde Survey (2011)

4.14 Around two-thirds (59%) of employees from all respondent businesses are management, professional or technical staff. These are skilled jobs that require high level qualifications and skills and deliver high value to the Scottish economy. Creative business respondents have a slightly higher proportion of jobs in this category (63%). Around a quarter (27%) are in administration, secretarial or skilled trades and 11% are in personal services, sales and customer services. A small proportion of jobs are in elementary occupations (3%).

Table 4.7: Employment by Occupational Category

	Creative businesses		Inside core		Outside core*		All respondents	
	No.	%	No.	%	No.	%	No.	%
Management, professional, technical (%)	1,179	63%	1,084	57%	512	64%	1,596	59%
Administrative, secretarial and skilled trades (%)	480	26%	528	28%	211	26%	739	27%
Personal services, sales and customer services (%)	175	9%	224	12%	73	9%	297	11%
Process plant, machine operatives and elementary (%)	46	2%	82	4%	2	0%	84	3%

Source: RTP Creative Clyde Survey (2011)

Factors Influencing Business Prospects

4.15 The current economic climate and access to funding are identified as the two most significant factors limiting growth prospects. The majority of creative business respondents (80%) and businesses inside the Creative Clyde core location (72%) state the current economic climate is either a ‘severely’ or ‘moderately limiting’ factor while around two-thirds of creative businesses (63%) and around two-thirds of businesses inside the core (63%) identify access to funding as either a ‘severely’ or ‘moderately limiting’ factor.

4.16 Respondents’ views on internet speed and its influence on business prospects are mixed. Around half in all categories of business believe it has a ‘limiting’ effect. A similar proportion believe it has a ‘positive’ effect. However at the extreme end of the impact scale, a noticeably higher proportion state that internet speed has a ‘strong positive effect’ (31%) compared to those identifying it as a ‘severely limiting’ influence (18%). This may be explained by the capacity requirements and expectations of different business types. 73% of businesses that stated internet speed was a ‘severely limiting’ factor were from TV & radio and Film businesses (operations with large requirements)[18] Only 47% of businesses

[18] Severely limiting: TV & radio (5); Film (3); Design (2) and managed workspace. TV & radio and film = 73% (8/11) Strong positive effect: TV & radio (4); Film (5); Design; Retail; Business Hub; Publishing; Arts and Antiques;

that stated internet speed had a 'strong positive effect' were TV & radio and Film businesses.

4.17 Creative business survey respondents generally believe access to a skilled workforce and access to commercial opportunities is having a 'positive' effect on their business prospects with a greater proportion of businesses stating it has a 'positive' effect compared with those identifying a 'negative' effect. A slight majority of creative businesses did however identify transport connectivity as having a 'limiting' effect on their business.

4.18 The majority of businesses within the core Creative Clyde area state access to commercial opportunities and transport connectivity has 'no effect' on their business (41% and 40% respectively).

Table 4.8: Factors Influencing Business Prospects

	Internet speed		Access to skilled workforce		Access to commercial opportunities		Transport connectivity		Current economic climate		Access to funding	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Creative businesses												
Severely limit	10	22%	4	9%	5	11%	4	10%	14	32%	10	23%
Moderately limit	10	22%	10	23%	8	18%	11	26%	21	48%	13	30%
No effect	6	13%	12	27%	12	27%	14	33%	5	11%	15	34%
Moderately positive effect	4	9%	3	7%	12	27%	11	26%	2	5%	1	2%
Has a strong positive effect	15	33%	15	34%	7	16%	2	5%	2	5%	5	11%
Inside core												
Severely limit	4	15%	0	0%	3	11%	3	12%	7	26%	5	19%
Moderately limit	10	37%	8	32%	6	22%	5	20%	13	48%	12	44%
No effect	5	19%	8	32%	11	41%	10	40%	4	15%	7	26%
Has a moderately positive effect	2	7%	1	4%	5	19%	6	24%	0	0%	1	4%
Has a strong positive effect	6	22%	8	32%	2	7%	1	4%	3	11%	2	7%
Outside core												
Severely limit	7	21%	4	12%	4	12%	2	6%	12	36%	8	24%
Moderately limit	7	21%	5	15%	6	18%	8	25%	13	39%	8	24%
No effect	2	6%	8	24%	5	15%	9	28%	2	6%	9	27%
Moderately positive effect	5	15%	4	12%	9	27%	9	28%	2	6%	1	3%
Has a strong positive effect	13	38%	12	36%	9	27%	4	13%	4	12%	7	21%
All responses												
Severely limit	11	18%	4	7%	7	12%	5	9%	19	32%	13	22%

entertainment and leisure; child care; Interactive leisure software; recruitment; television and multiplatform content. TV & radio and film = 47% (9/19)

	Internet speed		Access to skilled workforce		Access to commercial opportunities		Transport connectivity		Current economic climate		Access to funding	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Moderately limit	17	28%	13	22%	12	20%	13	23%	26	43%	20	33%
No effect	7	11%	16	28%	16	27%	19	33%	6	10%	16	27%
Has a moderately positive effect	7	11%	5	9%	14	23%	15	26%	2	3%	2	3%
Has a strong positive effect	19	31%	20	34%	11	18%	5	9%	7	12%	9	15%

Source: RTP Creative Clyde Survey (2011)

Turnover

4.19 Respondents were asked to give an indication of their annual turnover.

4.20 60% of all respondent businesses have a turnover of £500,000 or less. Nearly a quarter of respondents (22% of all respondents) have a turnover range within £250,000-£500,000. A relatively high proportion (24%) of businesses in the core Creative Clyde area have a turnover of more than £5 million.

Table 4.9: Turnover Range

	Creative businesses		Inside core		Outside core		All respondents	
	No.	%	No.	%	No.	%	No.	%
Less than £50,000	9	20%	1	4%	10	29%	11	19%
£50,000 - £100,000	7	16%	2	8%	5	15%	7	12%
£100,000 - £250,000	3	7%	2	8%	2	6%	4	7%
£250,000 - £500,0000	11	25%	6	24%	7	21%	13	22%
£500,000 - £1,000,000	1	2%	3	12%	1	3%	4	7%
£1,000,000-£2,500,000	6	14%	2	8%	5	15%	7	12%
£2,500,000-£5,000,000	2	5%	3	12%	1	3%	4	7%
£5,000,000+	5	11%	6	24%	3	9%	9	15%
Total	44	100%	25	100%	34	100%	59	100%

Source: RTP Creative Clyde Survey (2011)

4.21 The turnover value of respondent businesses in each business category can be estimated using the turnover ranges above. Additional information supplied by Scottish Enterprise on account managed creative businesses has been added to the analysis to provide more robust turnover estimates. Known turnover in creative businesses[19] in Glasgow is estimated in excess of £140 million.

[19] Estimate made up of surveyed businesses + SE account managed businesses.

Table 4.10: Turnover Estimates (£ million)

	Creative businesses	Inside core	Outside core	All respondents
Min t/o estimate	£52.6	£57.8	£33.0	£90.8
Max t/o estimate	£83.4	£86.8	£53.5	£140.3
Sub-total (mid-point used)	*£68.0*	*£72.3*	*£43.2*	*£115.5*
SE account managed creative businesses	*£72.5*	*£24.6*	*£47.9*	*£72.5*
Total Turnover	**£140.5**	**£96.9**	**£91.1**	**£188.0**

Source: RTP Creative Clyde Survey (2011)

HQ Location

4.22 Businesses headquarters have greater decision making powers and are likely to have a greater interest in the long-term development of the area in which they are based. Less than a third of creative business respondents responded from their headquarters location (31%). However, in the core Creative Clyde area, over half (57%) of all business survey respondents report this is their sole operating location, meaning a larger proportion of businesses are likely to have decision-making powers and a greater interest in the area's long-term development.

Table 4.11: Sole Operating Location (HQ)

	Creative businesses		Inside core		Outside core		All respondents	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Yes	14	31%	16	57%	8	24%	24	39%
No	31	69%	12	43%	26	76%	38	61%
Total	45	100%	28	100%	34	100%	62	100%

Source: RTP Creative Clyde Survey (2011)

Future Growth Prospects

4.23 The vast majority of all respondent businesses predict an increase in their current employment and turnover levels over the next three years. Around 80% of respondents in each of the business categories expect employee and turnover growth. Only a small proportion expect employment and turnover to fall over the next three years.

4.24 This indicates a high level of business confidence in creative businesses in Glasgow and in the Creative Clyde core area in the short to medium term.

Table 4.12: Future Growth Prospects over the Next 3 Years

	Creative businesses		Inside core		Outside core		All respondents	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Employees								
Positive	37	82%	24	86%	27	77%	51	81%
Negative	2	4%	1	4%	4	11%	5	8%
Neutral	6	13%	3	11%	4	11%	7	11%
Don't know	0	0%	0	0%	0	0%	0	0%
Total	45	100%	28	100%	35	100%	63	100%
Turnover								
Positive	37	82%	22	79%	28	80%	50	79%
Negative	1	2%	1	4%	3	9%	4	6%
Neutral	4	9%	3	11%	2	6%	5	8%
Don't know	3	7%	2	7%	2	6%	4	6%
Total	45	100%	28	100%	35	100%	63	100%

Source: RTP Creative Clyde Survey (2011)

5 CREATIVE INDUSTRY EMPLOYMENT ESTIMATES

5.1 This chapter examines statistical sources of estimates of the number of jobs in creative industries and other sectors both in the Creative Clyde location and across Glasgow.

5.2 It is difficult to define ‘creative industries’ using government-based datasets. There is no official definition of the industrial sectors which ‘should’ be included to define ‘creative industries’ based on the Standard Industrial Classifications (SIC). However, the Scottish Government document Creative Industries Key Sector Report (2009) sets out a list of sub-sectors; although it does not include a list of SIC codes to define these sectors:

- Advertising
- Architecture
- Arts and antiques
- Crafts
- Design
- Designer fashion
- Film
- Interactive leisure software
- Music
- Performing arts
- Publishing
- Software and computer services
- TV and radio

5.3 With reference to an SIC definition, Scottish Government (2009) states, ‘The Standard Industrial Classification (SIC), which classified businesses by what they produce or the type of activity in which they are mainly engaged in, does not fit exactly with creative activity in the economy. The SIC approach is industry based and so likely to over estimate in parts as non-creative jobs may be included within the 13 industry subsectors but undercount creative jobs that may exist in other sectors. However, the data available is valuable in giving us an idea of the makeup of the creative industries and providing useful indication of growth trends over time. We are exploring other options to address the data gaps by continuing to supplement the statistics based on industrial classification with information from occupational based data. It is not a challenge unique to Scotland – and we will consider the different approaches, to capture and monitor the industry, undertaken by the UK government.’

5.4 As suggested by Scottish Government, it is useful to use SIC classifications to give an idea of the makeup of creative industries. In the absence of a definition from the Scottish Government, we use a definition from the Department for Culture, Media and Sport (DCMS) which estimates SIC sectors which proxy 'creative industries'[20]. DCMS suggest that for certain sectors within the creative industry definition, only a proportion of the jobs can be defined as 'creative' e.g. only 25% of architecture and engineering activities and related technical consultancy are assumed to be creative. We have set out below two sets of estimates, one including 100% of the sectors defined as 'creative industries' (the 'wider definition'), and one including the proportions of the sectors defined as 'creative industries' (the 'narrower definition'). We have included both sets as it is likely the wider definition over-estimates figures but will encompass all possible companies at a local level, and the narrower definition may exclude some creative industries companies and employees at the local level. It seems reasonable to assume the actual figure is likely to lie somewhere between the wider and narrower definition.

FocusNet Database

Core Creative Clyde Location

5.5 We extracted information from a database sourced from www.focusnet.co.uk . Details on companies can be extracted from the database, based on selected geographies and specified sectors. The geographies we used were based on postcodes which covered the Creative Clyde location as closely as possible. The sectors we used were based on the defined sectors split by Focus themselves (as they do not work to SIC industries), but which we felt represented 'creative industries', as defined by the Scottish Government (2009*).* Focus provides estimates of employee figures at each business, where data is available.

5.6 The estimates from the database suggest there are around 114 companies located in the core Creative Clyde location. These companies are estimated by FocusNet to employ around 3,820 employees in total. Of these, around 22 (19%) of the companies are estimated to be 'creative industries' (using the Scottish Government definition of sectors), with around 2,264 employees in total (59%)[21].

5.7 Other companies in this location include those in: manufacturing and industrial sectors; finance and business services; accommodation, health & leisure and travel; and engineering and surveying companies. The remaining sectors include retail, call centres, childcare, museums & cinemas and catering, amongst others, but the numbers for each sector are too small to disclose without breaching confidentiality. It is notable that many of these sectors have a relatively large number of companies, but a proportionately small share of the employment (e.g. manufacturing accounts for 24% of businesses, but only 9% of employment).

[20] See Appendix 4 for the list of SIC categories and proportions taken. No estimates are made for Crafts or Design companies as there are no SIC categories that are appropriate.

[21] However, FocusNet estimates an additional 400 employees at the BBC compared to the actual response given by the BBC.

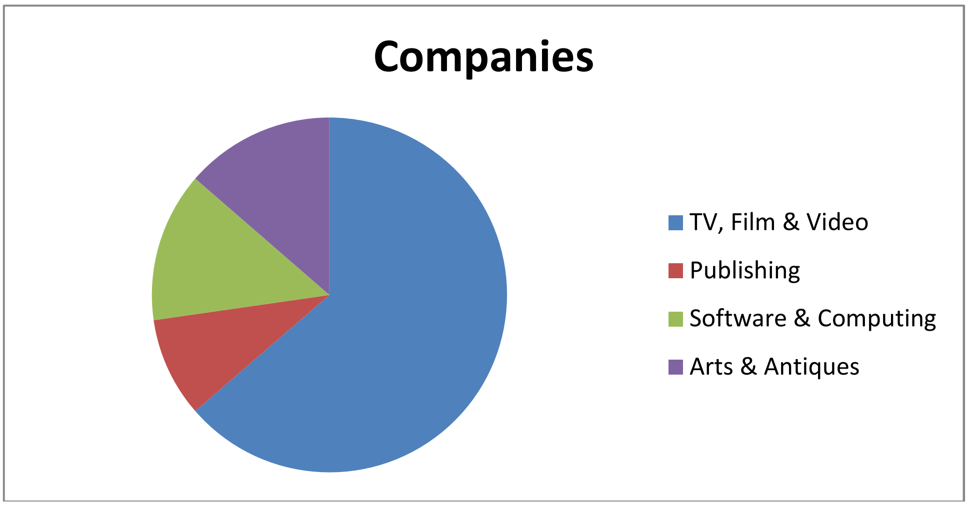
Table 5.1 FocusNet Database, Core Creative Clyde Location

	Companies		Employees		Average jobs per company
	Number	% total	Number	% total	
Total	**114**		**3,820**		
Creative Industries	22	19%	2,264	59%	102
Manufacturing & Industrial	27	24%	356	9%	13
Finance & Business Services	14	12%	86	2%	6
Accommodation, Health & Leisure, Travel	11	10%	493	13%	45
Engineering & Surveying	10	9%	223	6%	22
Other	30	26%	398	10%	13

Source: www.focusnet.co.uk, RTP

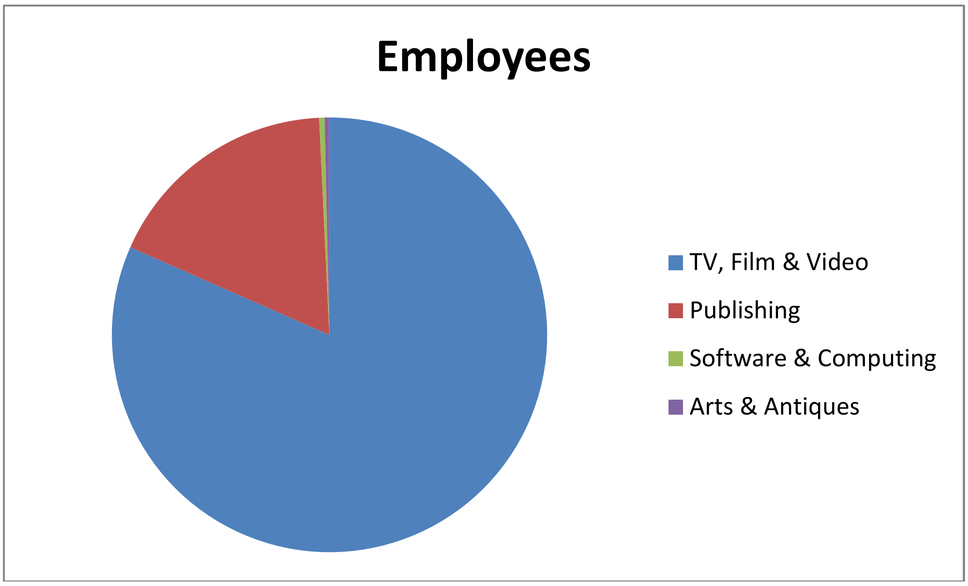
5.8 The split of creative industries between the number of companies and employees is shown below. Broadcasting accounts for by far the greatest proportion of employees, showing the dominance of the major players, such as the BBC and STV.

Figure 5.1 Creative Industries Split by Numbers of Companies, Core Creative Clyde Location



Source: RTP/FocusNet Note: values cannot be displayed in a public document due to confidentiality restrictions

Figure 5.2 Creative Industries Split by Numbers of Employees, Core Creative Clyde Location



Source: RTP/FocusNet Note: values cannot be displayed in a public document due to confidentiality restrictions

5.9 It is evident that a number of companies in the core Creative Clyde area are not picked up by the FocusNet database as creative industry companies from the core Creative Clyde. This confirms the requirement to use a variety of sources to gauge the information on business location and employee figures, as no one source seems to have an exhaustive list.

Glasgow

5.10 We also extracted information from the FocusNet database to estimate the number of businesses and employees working in 'creative industries' (as defined by the Scottish Government) across Glasgow as a whole.

5.11 The database estimates there are around 14,858 employees working in creative industries, in 870 companies. The geographical breakdown of the companies is shown below (see Table 5.2). This suggests 3% of the creative industries businesses are located in the core Creative Clyde location, with 15% of the employees (see Table 5.3).

Table 5.2 Employees in Creative Industries from FocusNet Database, Glasgow, 2011

	Companies	% of total	Employees	% of total	Average jobs/ company
Total	**870**		**14,858**		
Advertising	74	9%	1,428	10%	19
Architecture	230	26%	5,903	40%	26
Antiques and arts	52	6%	175	1%	3
Design	109	13%	566	4%	5
Designer Fashion	11	1%	40	0%	4
Software & computers	184	21%	1,588	11%	9
Music	90	10%	577	4%	6
Publishing	47	5%	1,848	12%	39
TV film and video*	73	8%	2,733	18%	37

Source: RTP/FocusNet
* FocusNet does not split TV, Film and Video sectors, which is why we have not split them in this table to align with Scottish Government sectors. This sector includes Broadcasting.

Table 5.3 Creative Industry Companies and Employees in the Core Creative Clyde location and across Glasgow, FocusNet estimate

	Companies	Employees
Glasgow – Creative Industries	870	14,858
Core Creative Clyde location – Creative Industries	22	2,264
Core Creative Clyde location as % of total	*3%*	*15%*

Source: www.focusnet.co.uk, RTP

Annual Business Inquiry (ABI) Data

5.12 We set out below estimates of numbers of jobs and businesses in creative industries and total sectors in the core Creative Clyde location[22] and across Glasgow using ABI data. We use the DCMS definition, covering both the wider and narrower definitions. We use data only up to 2008 as information on the number of businesses is not available post-2008.

Core Creative Clyde Location

5.13 The ABI gives an estimate that in 2008 there were between approximately 2,300 and 4,200 people[23] working in creative industries in the area around the Creative Clyde location[24]. This represented 21-39% of the employees working in this area.

[22] See Appendix 5 for a map of Scottish Data Zones used to define the core Creative Clyde location. This is a wider geography than the core location defined by SE and also encompasses areas to the North in Finnieston and Cranston Hill, as well as heavily industrial areas of Ibrox to the South West and Govan to the West.

[23] The wider definition includes a large number of people working in Art and Antiques, which the SIC definition defines to be 'other retail sales in specialised stores' and 'retail sale of second-hand goods in stores'. We therefore feel the narrower definition is more appropriate to the core Creative Clyde location, as the aims of Creative Clyde are more aimed at digital media companies etc rather than retail.

[24] The Scottish data zones used cover a wider geographical area than the core Creative Clyde location, but is the smallest area for which it is possible to get the information but also cover the area.

Table 5.4 Estimates of Employees and Businesses in Creative Industries, Core Creative Clyde Location

Source	Businesses			Employees			Year
	Creative Industries	Total	% total	Creative Industries	Total	% total	
ABI (wider definition)	90	390	23	4,200	10,900	39	2008
ABI (narrower definition)	40	390	10	2,300	10,900	21	2008
FocusNet	22	114	19	2,264	3,820	59	2011

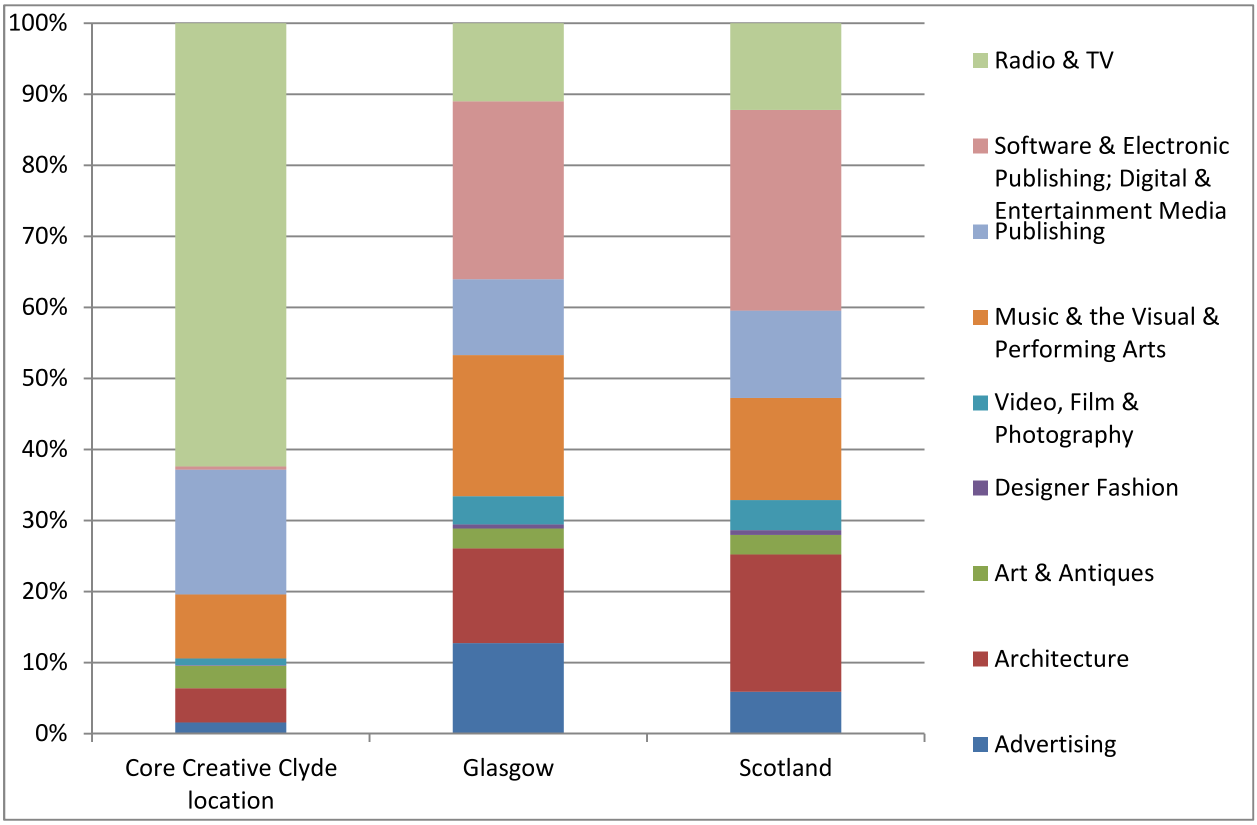
Source: ABI, www.focusnet.co.uk , RTP

Note: The total number of jobs in the core Creative Clyde location is estimated to be much higher by the ABI as the geographical coverage used for the ABI is bigger than the SE defined area (see footnote 6).

5.14 Between 40 and 90 businesses were engaged in creative industry according to the ABI in 2008. This represented 10-23% of businesses in the area. This suggests the average size of business was large, or that there were at least a small number of particularly large companies which skews the average size of company in the location.

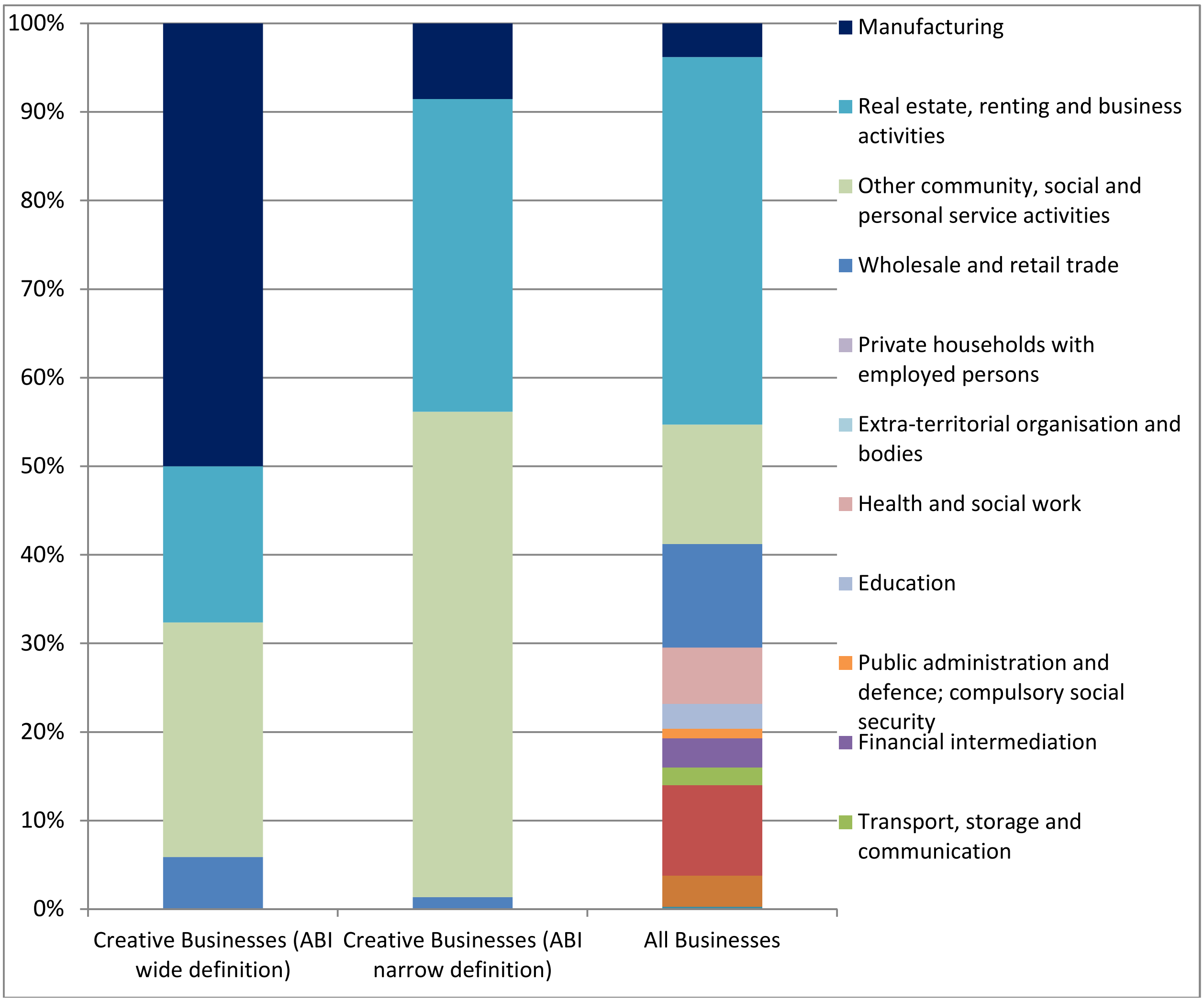
Figure 5.3 shows that the core Creative Clyde area has a strong concentration of employees in Radio & TV compared to Glasgow and Scotland; this reflects the location of the BBC and STV. Figure 5.4 shows the breakdown of businesses in the core Creative Clyde area by broad industry sector.

Figure 5.3 Breakdown of Employees by Creative Industry Sectors (narrow ABI definition), 2008



Source: Annual Business Inquiry, RTP Note: values cannot be displayed in a public document due to confidentiality restrictions

Figure 5.4 Breakdown of Businesses in Core Creative Clyde Area, 2008[25]



Glasgow City

5.15 In Glasgow, the ABI estimates there were between approximately 16,000 and 34,700 people working in creative industries, representing 4-8% of Glasgow's workforce.

[25] For Creative Businesses:*Manufacturing includes: Publishing of books, newspapers, journals and periodicals, sound recordings, reproduction of sound and video recordings and computer media. Also the manufacturing of: dressing and dyeing of fur; footwear; manufacture of articles of fur knitted and crocheted hosiery; knitted and crocheted pullovers, cardigans and similar articles; leather clothes; work wear; other wear; underwear; wearing apparel and accessories not elsewhere classified.
*Wholesale and retail trade includes: other retail sale in specialised stores; retail sale of second-hand goods in stores.
*Real estate, renting and business activities include: publishing of software; other software consultancy and supply; architectural and engineering activities and related technical consultancy; advertising; and photographic activities.
*Other community, social and personal service activities include: motion picture and video production; motion picture and video distribution; motion picture projection; radio and television activities; artistic and literary creation and interpretation; operation of arts facilities; other entertainment activities not elsewhere classified; news agency activities; other recreational activities not elsewhere classified.

Table 5.5 Estimates of Employees and Businesses in Creative Industries, Glasgow

Source	Businesses			Employees			Year
	Creative Industries	Total	% total	Creative Industries	Total	% total	
ABI (wider definition)	3,400	20,800	16.3	34,700	413,500	8.3	2008
ABI (narrower definition)	1,400	20,800	6.7	16,000	413,500	3.9	2008
FocusNet	870	-	-	14,858	-	-	2011

Source: ABI, www.focusnet.co.uk , RTP

5.16 The core Creative Clyde location therefore has 12-14% of Glasgow's creative industry employees and around 3% of the companies (see Table 5.6).

Table 5.6 Creative Industry Companies and Employees in the Core Creative Clyde location and across Glasgow, ABI Estimate

		Companies	Employees
Wider definition	Glasgow	3,400	34,700
	Core Creative Clyde location	90	4,200
	Core Creative Clyde as % of total	*3%*	*12%*
Narrower definition	Glasgow	1,400	16,000
	Core Creative Clyde location	40	2,300
	Core Creative Clyde as % of total	*3%*	*14%*

Source: ABI, RTP

FAME Database

5.17 The FAME database (provided by Scottish Enterprise) sets out a list of companies operating in the creative industries based within Glasgow City's local authority area. This is based on a Standard Industrial Classification (SIC) definition of creative industries. However, it only includes companies employed in sectors set out in Table 5.7, which is a narrower definition than the DCMS version overall (e.g. it does not include companies in design sectors, architecture, music etc). However, the definition of computer and related activities is much broader than the DCMS definition. This estimates around 1,310 companies across Glasgow, with the majority in computer and related activities.

Table 5.7 Number of Companies from FAME Database in Glasgow

SIC	Sector	Number of companies in Glasgow
7440	Advertising	90
2233	Reproduction of computer media	classified
72	Computer and related activities	820
9220	Radio and television activities	70
9231	Artistic and literary creation and interpretation	140
9211	Motion picture and video production	70
	Other	120
	Total	**1,310**

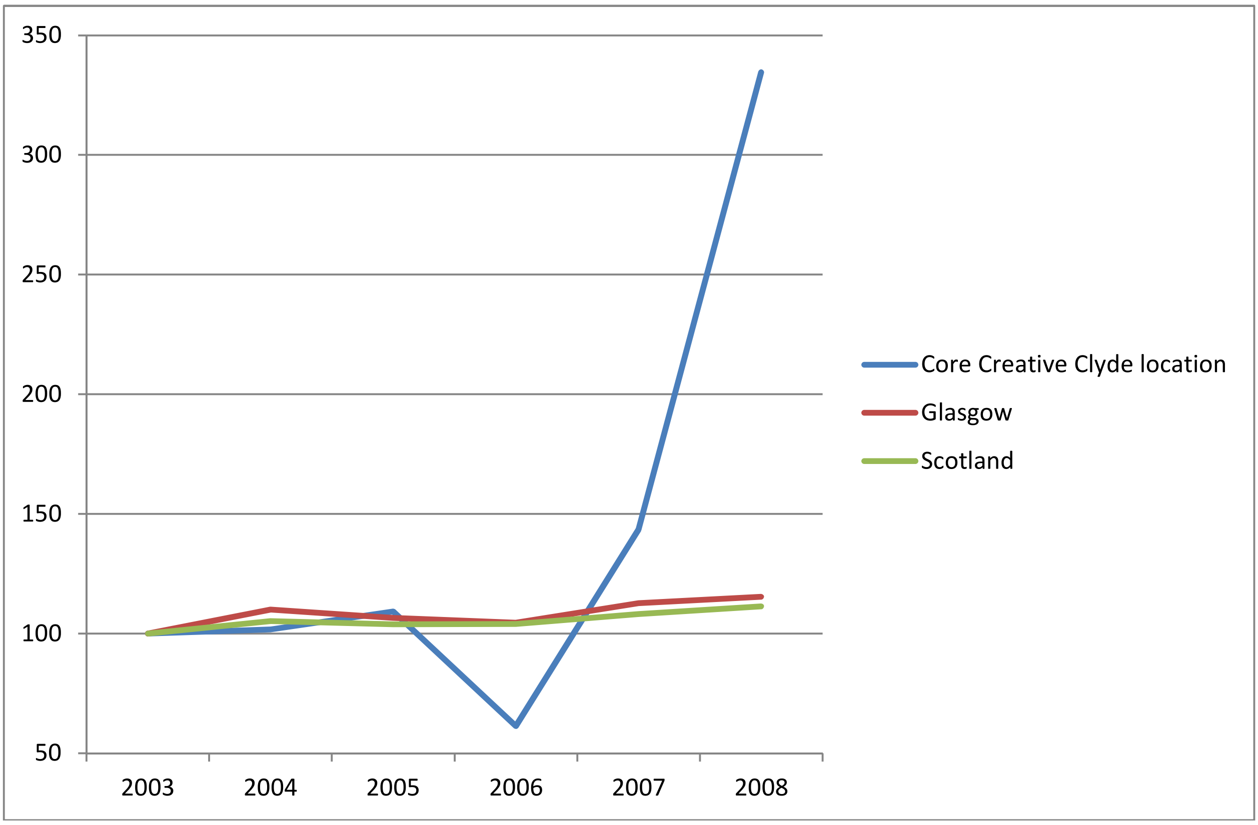
Source: FAME database, provided by Scottish Enterprise

Change in Creative Industry Jobs (ABI data)

5.18 Using the ABI narrower definition of creative industries (which only takes a proportion of some sectors of creative industries), Figure 5.5 below shows the change in the number of jobs in creative industries in the core Creative Clyde location, Glasgow and across Scotland. An index has been used to show comparative levels of growth.

5.19 The core Creative Clyde location has clearly seen much higher rates of growth than both Glasgow and Scotland since 2003 (although the smaller numbers mean the percentages are from a smaller base). Glasgow has seen slightly higher rates of growth than the national average, with a threefold increase in the number of jobs.

Figure 5.5 Index of Employees Working in Creative Industries, 2003-2008 (2003=100)

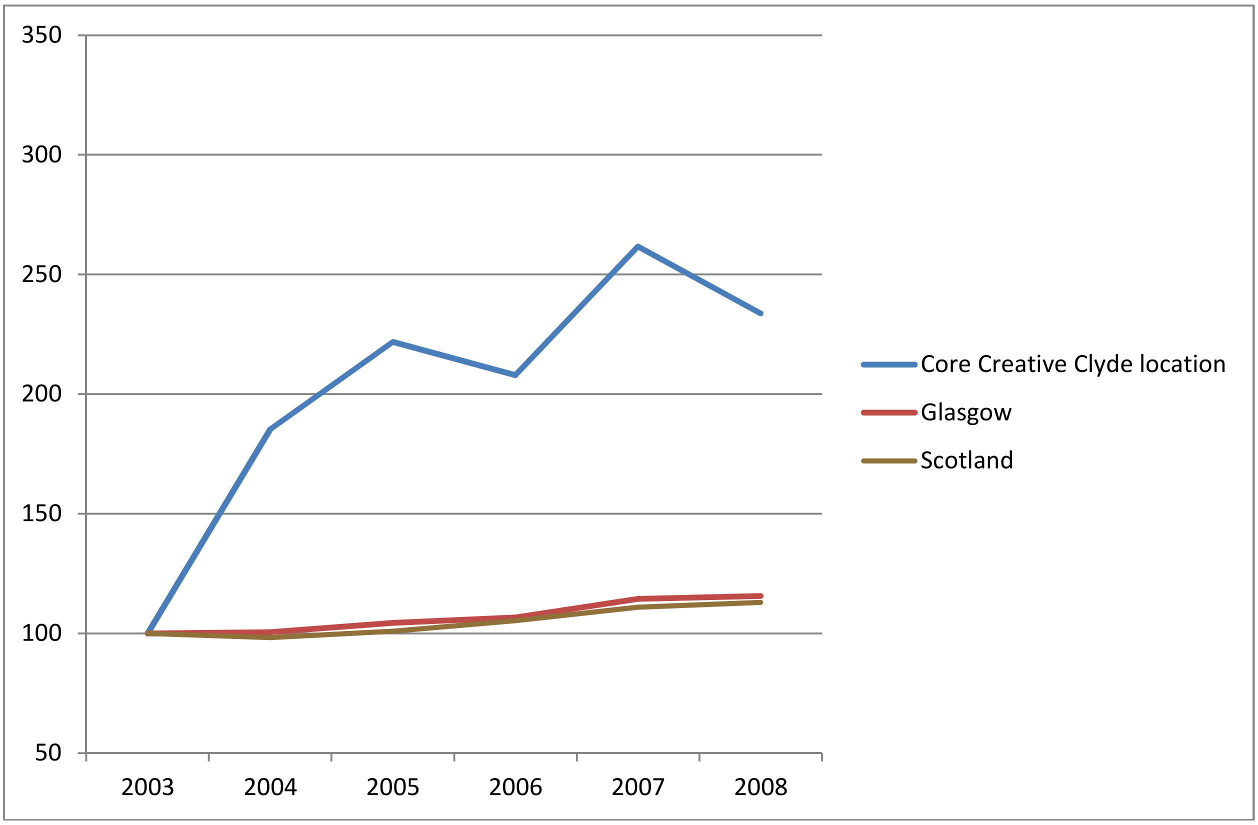


Source: ABI, RTP

5.20 Figure 5.6 below shows the change in the number of companies in creative industries in the core Creative Clyde location, Glasgow and across Scotland. As above, an index has been used to show comparative levels of growth.

5.21 Again, the core Creative Clyde location has seen much higher rates of growth than both Glasgow and Scotland since 2003 (although the smaller numbers mean the percentages are from a smaller base). Glasgow has seen slightly higher rates of growth than the national average.

Figure 5.6 Index of Workplaces in Creative Industries, 2003-2008 (2003=100)



Source: ABI, RTP

Summary

5.22 In the core Creative Clyde location using the narrower definition of creative industries, there are around 2,300 jobs in around 40 companies in creative industries, representing around 20% of the total jobs in this location. This number of jobs has increased three-fold since 2006. The survey covered 14 (35%) of these companies, with a further 5 already providing information as Scottish Enterprise account managed companies.

5.23 There are around 16,000 jobs in creative industries across Glasgow, representing around 4% of all jobs in the city.

Table 5.8 Summary Table

Location	Jobs	Data source	Companies	Employees
Core Creative Clyde	Creative Industries	FocusNet	22	2,264
		ABI – wider	90	4,200
		ABI - narrower	40	2,300
	Total sectors	Focus	114	3,820
		ABI	390	10,900
Glasgow	Creative Industries	FocusNet	870	14,858
		ABI – wider	3,400	43,700
		ABI - narrower	1,400	16,000
	Total sectors	ABI	20,800	413,500

Source: ABI, www.focusnet.com, RTP

5.24 It is difficult to give a definitive figure for ‘creative industries’ as it is so dependent upon the definition of which industries are included within the creative industry definition. Even if a definition is selected, some companies in the same industry will be creative whilst others will not. We suggest the best estimate is based on the narrower ABI definition, meaning:

- 2,300 jobs in creative industries in the core Creative Clyde location in 40 companies (out of a total of 10,900 jobs in 390 companies).
- 16,000 jobs in creative industries across Glasgow in 1,400 companies (out of a total 413,500 jobs in 20,800 companies).
- The number of jobs per business varies depending on sector and location.

6 MONITORING & EVALUATION RECOMMENDATIONS

6.1 We set out below some suggestions for ongoing monitoring of the information extracted through this current survey process.

Ongoing Monitoring

Traditional Option

6.2 Data could be updated annually through repeating the current survey, with annual checks to ensure the survey population is kept up to date. This could be carried out online, as it was this year, with follow up telephone calls, or it could be carried out by post, or through door-to-door surveying. Individual companies could be given a code. The companies' locations and data could then be inputted into Excel, as well as potentially mapped.

6.3 The benefits of this option are as follows:

- The survey is already set up and ready to be re-used.
- The survey population is already established and ready to be updated.
- There would be continuity of data inputs.

6.4 However, there are some potential problems:

- There is no guarantee that companies would continue to respond.
- Whilst the response rate from this year (29%) is reasonable, it could be higher.

6.5 The work using ABI and FocusNet data could also be repeated on an annual basis, to check the trends these datasets show. Again, this would be beneficial as it would be a direct comparison of trends with continuity of datasets.

Digital Option

6.6 A digital system could be established where each respondent is sent last year's information to update. This means the response rate is likely to be high and returns much faster.

6.7 Alternatively (or in addition), the survey could be sent via Twitter (presuming companies subscribe to an overall Creative Clyde/SE Twitter feed). It could also be posted on Facebook (again, assuming an industry Facebook page has been developed). The survey could also be posted on SE, Creative Clyde and partner websites. The survey could be promoted at events and done in tandem with a big annual conference or links to something that most creative companies are interested in. Whilst these options have the potential to reach a large number of companies, the incentive to fill in the survey may be lower if companies are not targeted directly.

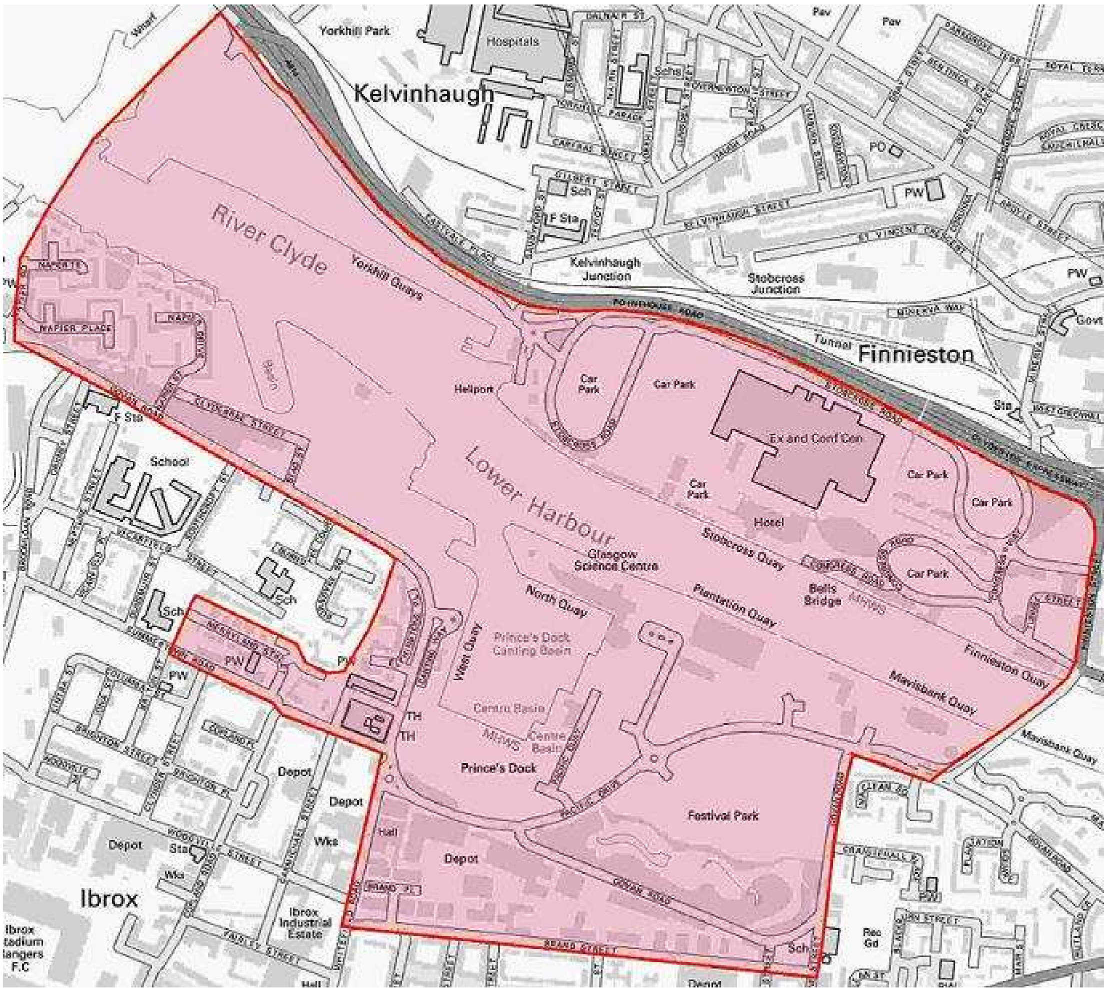
6.8 The survey could be kept as a current/ living database that companies are invited to update quarterly with the live results always available in real-time. This has the benefit that companies can see directly the impact of their inputs. However, it may be more difficult to set up and monitor who has responded to the survey.

6.9 Links and graphics could be made available to companies for their websites (company specific calculations could show each company's estimated GVA or some other useful economic indicator). This would encourage companies to respond to the survey and increase response rates.

APPENDIX 1

Map of Core Creative Clyde

Core Creative Clyde



Source: RTP 2011

APPENDIX 2

Survey Template

Creative Clyde Company Survey

The Creative Clyde initiative, delivered by Scottish Enterprise, in partnership with Scottish Development International, Clyde Waterfront, Glasgow City Council, Creative Scotland, BBC Scotland, University of Glasgow, SECC and private enterprise, aims to create a significant location, destination and hub for the Digital Media sector in Scotland. Its development is seen a key driver for achieving the Scottish Digital Media Industry Advisory Group's strategy for long-term, sustainable growth for Scotland's digital media industries.

To monitor progress towards achieving Creative Clyde's objectives, Scottish Enterprise is updating its information on companies located in the area and have engaged Roger Tym & Partners (RTP) to gather this information.

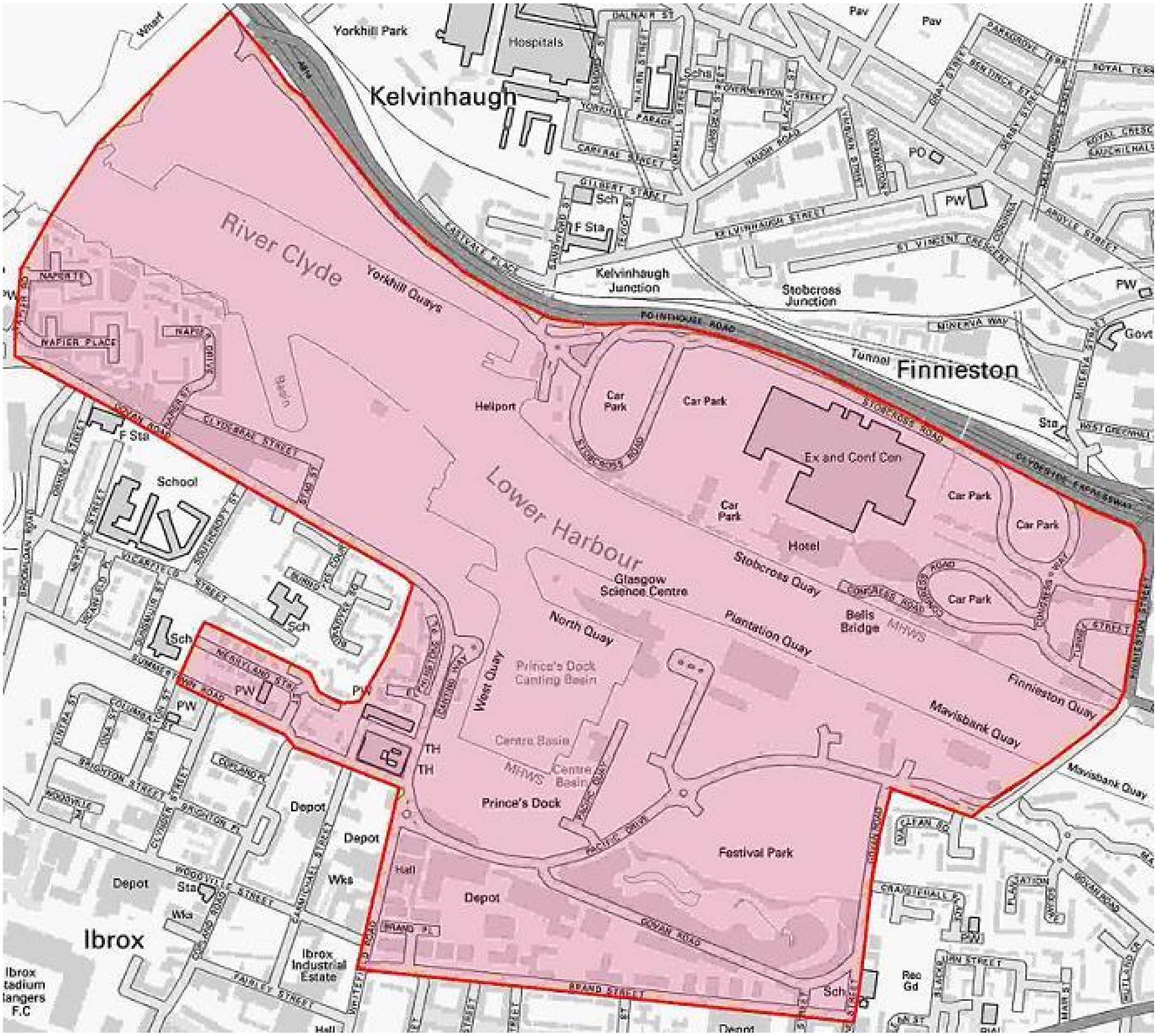
We would be grateful if you could spare 5 minutes to assist by completing the attached short questionnaire.*

Your feedback will be extremely useful to Scottish Enterprise.

Thank you for your time.

*The information provided to RTP will be treated in the strictest confidence and will only be reported in aggregated form. On completion of the study we can provide you with a note of the high-level findings.

Creative Clyde location (red boundary)



***1. Name of your business?**

2. Name of business contact?

3. Is your business located in the Creative Clyde area (outlined in red above)?

- ◯ Yes
- ◯ No

4. What is your main business activity?

- ◯ Advertising
- ◯ Architecture
- ◯ Arts and antiques
- ◯ Crafts
- ◯ Design
- ◯ Designer fashion
- ◯ Entertainment and leisure
- ◯ Film
- ◯ Interactive leisure software
- ◯ Music
- ◯ Performing arts
- ◯ Publishing
- ◯ Retail
- ◯ Software and computer services
- ◯ TV and radio

Other (please specify)

5. How many people work at your current location?

This year

3 years ago

5 years ago

6. Of these, how many are currently full or part time?

Full-time %

Part-time %

7. What proportion of your staff are involved in the following activities? Your response should sum to 100%

Management, professional, technical (%)

Administrative, secretarial and skilled trades (%)

Personal services, sales and customer services (%)

Process plant, machine operatives and elementary (%)

8. Do you operate from other locations (as well as your current location)?

- Yes
- No

If yes, please specify your other locations and head-quarters location

9. Do any of the following affect your business prospects?

	Severely limit	Moderately limit	No effect	Has a moderately positive effect	Has a strong positive effect
Internet speed					
Access to skilled workforce					
Access to commercial opportunities					
Transport connectivity					
Current economic climate					
Access to funding					

Other (please specify)

10. Please can you provide an indication of your annual turnover? This information will be treated in confidence.

- Less than £50,000
- £50,000 - £100,000
- £100,000 - £250,000
- £250,000 - £500,0000
- £500,000 - £1,000,000
- £1,000,000 - £2,500,000
- £2,500,000 - £5,000,000
- £5,000,000+

11. How do you expect your business to change over the next three years? Please indicate if the change is positive (+) or negative (-)

Employees (%)

Turnover (%)

12. Before this survey, were you aware of Creative Clyde concept

	Yes	No
As a location?		
As a programme?		
As an industry body?		

13. Please enter your contact details below to recieve a copy of the findings of this research

Name	
Email	
Address	
Postcode	
Telephone No.	

APPENDIX 3

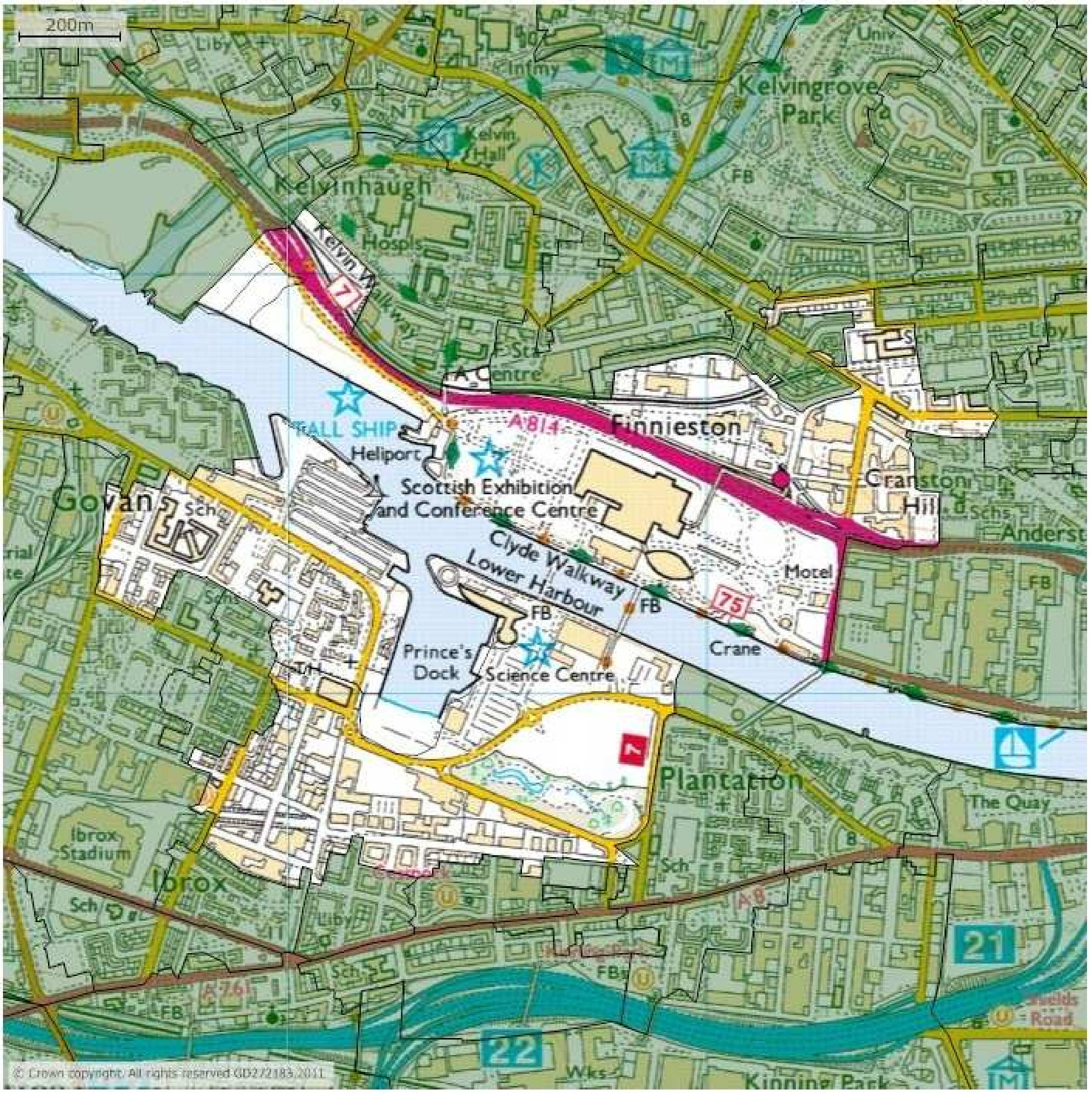
DCMS Creative Industries Definition

Sector	Sub-Sector	SIC (2003)	Proportion Taken
Advertising	Advertising	74.40	
Architecture	Architecture and engineering activities and related technical consultancy	74.20	25%
Art & Antiques	Other retail sale in specialised stores	52.48	5%
	Retail sale of second-hand goods in stores	52.50	5%
Crafts	No codes suitable		
Design	No codes suitable		
Designer Fashion	Clothing manufacture – 9 codes: Manufacture of knitted and crocheted hosiery Manufacture of knitted and crocheted pullovers, cardigans and similar articles Manufacture of leather clothes Manufacture of workwear Manufacture of other outerwear Manufacture of underwear Manufacture of other wearing apparel and accessories not elsewhere classified Dressing and dyeing of fur; manufacture of articles of fur Manufacture of footwear	17.71 17.72 18.10 10.21 18.22 18.23 18.24 18.30 19.30	0.5% (all)
	Other business activities not elsewhere classified	74.87	2.5%
Video, Film & Photography	Reproduction of video recording	22.32	25%
	Photographic activities	74.81	25%
	Motion picture and video production	92.11	
	Motion picture and video distribution	92.12	
	Motion picture projection	92.13	
Music & the Visual & Performing Arts	Publishing of sound recordings	22.14	
	Reproduction of sound recording	22.31	25%
	Artistic and literary creation and interpretation	92.31	
	Operation of arts facilities	92.32	
	Other entertainment activities not elsewhere classified	92.34	50%
	Other recreational activities not elsewhere classified	92.72	25%
Publishing	Publishing of books	22.11	
	Publishing of newspapers	22.12	
	Publishing of journals and periodicals	22.13	
	Other publishing	22.15	50%
	News agency activities	92.40	
Software & Electronic Publishing; Digital & Entertainment Media	Reproduction of computer media	22.33	25%
	Publishing of software	72.21	
	Other software consultancy and supply	72.22	
Radio & TV	Radio and television activities	92.20	

Source: Department for Culture, Media and Sport (December 2010), *Creative Industries Economic Estimates (Experimental Statistics) Full Statistical Release*

APPENDIX 4

Data Zone Estimation of Core Creative Clyde Location



Source: www.nomisweb.co.uk