South of Scotland

Creative Economy

guide

2023

SOUTH of SCOTLAND ENTERPRISE

Creative Industries

v

Creative Economy

The term **Creative Industries** has been used for over 20 years and was adopted by the UK government department for Culture, Media and Sport to describe the collection of a wide range of creative and cultural activity. Nationally it is often interpreted as representing more commercial creative businesses and locally often interpreted as representing visual/performing arts and crafts. It is also negatively received by some creatives who feel their practice is incompatible with the term 'industry'.

This guide will therefore generally veer towards the wider, more inclusive term of **Creative Economy** to share some of the understanding of this sector within the South of Scotland.

About this guide...

This guide is intended to be a useful resource by providing a general overview of the **Creative Economy** in the South of Scotland so that a clear and consistent approach to this area is understood.

This guide will constantly evolve and whilst it won't cover every element of the sector, the intention is to keep it as up to date as possible, highlighting identified priorities and areas of opportunity and policy development.

Each local authority in the South has a **Cultural Strategy** focused on their own place, cultural identity and unique strengths. This guide aims to complement those with a high-level representation of the **Creative Economy**. We are cutting new ground with our innovative approach and some of the figures in this guide could be considered experimental statistics and will be refined over time. The methodology around the data can be read at the end of this document.

Throughout the guide there are links specific to each sub-sector of the Creative Economy to take you to strategies, industry bodies, data sources and more information.

Click on the relevant button to take you there.

Strategy | Industry Body | Source | More

Scottish Government defines the

Creative Industries

as those based on **individual creativity**, **skill and talent**, or which have the potential to create wealth and jobs through the **development or production** of **intellectual property**

Creative economy sub-sectors…

The **Creative Economy** includes 16 sub-sectors which are; advertising, architecture, computer games, crafts, cultural education, design, fashion and textiles, film and video, heritage, music, performing arts, photography, radio and TV, software and electronic publishing, visual art, writing and publishing.

Scotland's **Creative Economy in numbers**

15,000

Creative Economy enterprises in Scotland

70,000

People employed as well as freelancers and students

£5 Billion

Contribution to the Scottish economy every year from the Creative Economy

Source: Scottish Government

South of Scotland **Creative Economy in numbers**

1,882

Creative Enterprises in the South of Scotland with the highest prominence in Dumfries and surrounding area (387)

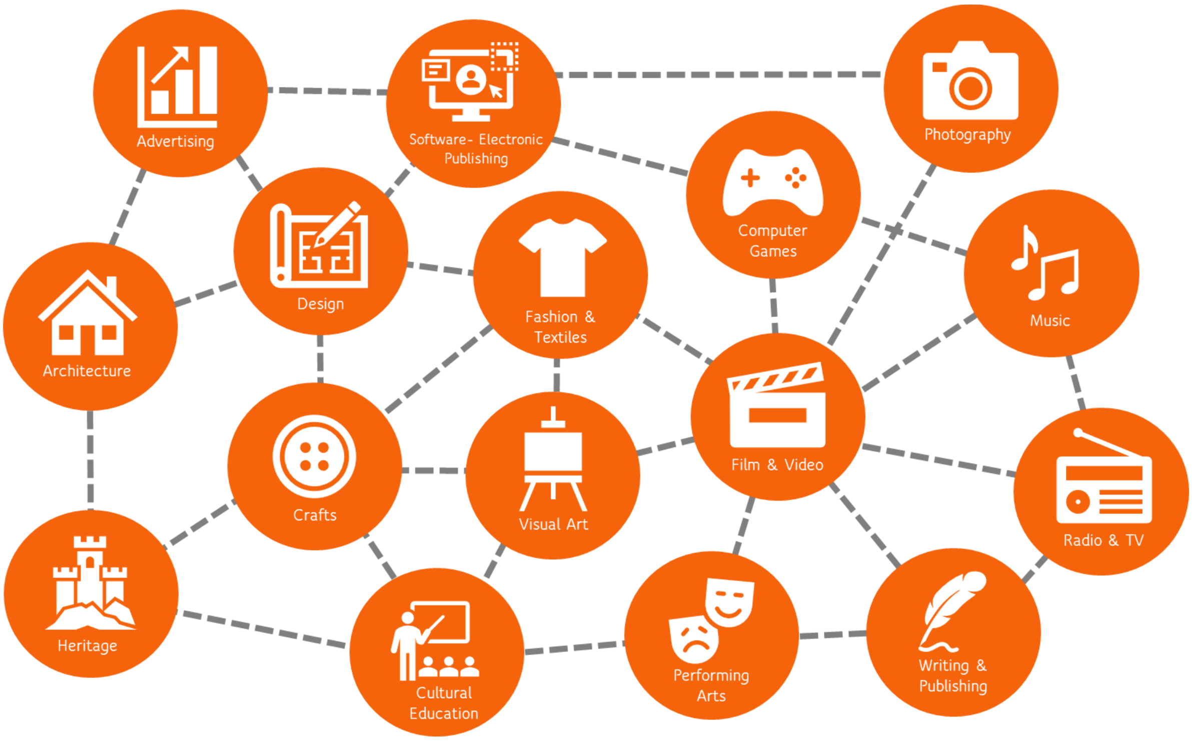
6,327

People working and volunteering (550) in the Creative Economy with the highest number in the fashion and textiles sub-sector (1,801) followed by heritage (1,231). 1,152 are freelance or self-employed

£280 Million

Turnover generated across the South of Scotland with fashion and textiles accounting for more than half of this value

Source: SOSE mapping of the Creative Economy 2023



South of Scotland Creative Eco-system

	Enterprises	People	Turnover *
Advertising	37	50	£1.5m
Architecture	90	268	£9.7m
Computer Games	8	10	£190k
Crafts	200	226	£4.2m
Cultural Education	10	13	£105k
Design	110	213	£13.1m
Fashion and Textiles	124	1,801	£161.4m
Film and Video	139	220	£5,4m
Heritage	133	1,231	£33.8m
Music	147	438	£4.1m
Performing Arts	96	267	£7.1m
Photography	186	237	£4.8m
Radio and TV	12	88	£514k
Software / Electronic publishing	127	362	£17.9m
Visual Art	335	495	£6.4m
Writing and Publishing	128	409	£10m

*Arithmetic mean, rounded figures   Source: SOSE mapping of the Creative Economy 2023

South of Scotland **Creative Economy in numbers**

59%

of creative enterprises in the South of Scotland are **Sole Traders**

41%

of creative enterprises in the South of Scotland are **Female Led**

31%

of creative enterprises in the South of Scotland are part of the **Digital Economy**

Source: SOSE mapping of the Creative Economy 2023

South of Scotland **Creative Economy in numbers**

11%

of creative enterprises in the South of Scotland are part of the **Visitor Economy**

10%

of creative enterprises in the South of Scotland are **Social Enterprises**

19%

of creative enterprises in the South of Scotland are based in **Dumfries**

Source: SOSE mapping of the Creative Economy 2023

Advertising

37 **50** **£1.5m**

Advertising industry is made of companies that advertise, agencies that create the advertisements, media that carries the ads, and a host of people like copy editors, visualisers, brand managers, researchers, creative heads and designers who take it the last mile to the customer or receiver.

The highest concentration of business in this sub-sector is in the Scottish Borders although the highest concentration by settlement is in Dumfries (**10**) followed by Galashiels (**6**).

Enterprises counted in the advertising sector in the South of Scotland are those that create the **marketing content**, **copy** or **branding** rather than the platform that they may appear on such as websites, print or screen. This sub-sector supports and relies on many of the other sectors of the creative economy. Web developers and SEO companies are recorded in the software and electronic publishing sub-sector of the creative economy.

- In 2015, **£1.7 billion** was spent advertising goods and services to Scottish consumers – this is equivalent to £321 per person in Scotland, which is marginally higher per capita than in the rest of the UK. The contribution to Scottish GDP was **£8.8 billion** – representing 5.6% of the Scottish economy. (Scotland Advertising Pays)
- Those advertising revenues support **42,000** jobs across Scotland representing 1.6% of all jobs in Scotland. Most of these jobs were either directly in advertising agencies or in in-house marketing departments within advertisers. This direct employment in the advertising sector totalled over **21,000** jobs in Scotland.
- A further **7,000** jobs were supported in media, digital and creative businesses that rely on advertising revenues.
- In addition, the companies and people involved in this sector also supported wider employment through their purchase of goods and services and the spending of their wages. This supported an additional **13,500** jobs throughout the Scottish economy.
- The professional, scientific and technical activities sector accounted for the greatest proportion of the supply chain, with these businesses in Scotland selling **£47.5 million** of services to Scottish advertising agencies.
- Average salaries in the sector are around **£37,000** – 11% higher than the mean Scottish salary of £33,500.

Source: Advertising Association

Advertising can play a key role in **communicating**, **promoting** and **marketing** the South of Scotland as well as our innovative people, enterprises and communities.

More Source Industry Body

Architecture

90 **268** **£9.7m**

Architecture is the art and science of designing buildings and other physical structures. A wider definition often includes the design of the total built environment from the macro level of town planning, urban design, and landscape architecture to the micro level of construction details and, sometimes, furniture. The term "Architecture" is also used for the profession of providing architectural services.

Architectural design is primarily driven by the creative manipulation of mass, space, volume, texture, light, shadow, materials, program, and realistic elements such as cost, construction and technology, to achieve an end which is aesthetic, functional and often artistic. This distinguishes Architecture from engineering design, which is usually driven primarily by the creative application of mathematical and scientific principles.

There are **90** architectural enterprises operating in the South of Scotland, **50** in the Scottish Borders and **40** in Dumfries & Galloway.

- Despite the unprecedented challenges of the pandemic, Royal Institute of British Architects (RIBA) Charted Practices have rapidly adapted their businesses and so maintained consistent levels of profits.
- Revenue up by **1%** on last year to **£3.1bn** at RIBA chartered practices
- **17%** more staff employed, returning to pre-pandemic level – currently sitting at **44,300** in the UK
- **30%** of all revenue comes from private housing. For practices with less than 10 staff its more than **50%**.

Source: RIBA Executive Summary 2022

Architecture straddles the creative and construction sector and there are issues disentangling its figures and data accordingly. It also links into design, photography and other creative sectors.

A key link is to the **Place Principle** as guiding light in place making and creation in Scotland. It promotes a shared understanding of place, and the need to take a more collaborative approach to a place's services and assets to achieve better outcomes for people and communities. The principle encourages and enables local flexibility to respond to issues and circumstances in different places.

Architecture also offers an opportunity to link into **net zero**, **community wealth building** and **20-minute neighbourhoods**.

Source | Industry Body | Strategy

Computer Games

8 10 £190k

Computer games industry encompasses the development, marketing, and monetisation of video games. Video game development is the process of developing a video game. The effort is undertaken by a developer, ranging from a single person to an international team dispersed across the globe. Development of traditional commercial PC and console games is normally funded by a publisher and can take several years to reach completion. Indie games usually take less time and money and can be produced by individuals and smaller developers. The independent game industry has been on the rise, facilitated by the growth of accessible game development software such as **Unity** platform and **Unreal** Engine and new online distribution systems such as Steam and Uplay, as well as the mobile game market for Android and iOS devices.

Scotland is the UK's **fourth** largest games cluster behind London, the South-East and North-West of England.

- The Scottish Games Industry is growing more quickly than the rest of the UK.
- Employment in the Scottish Games industry grew **26%** between April 2020 and Dec 2021. There were **2,269** permanent and full-time equivalent staff in Scotland (up from 1,803 in April 2020). None are employed in Publishing according to the Screen Business Report.
- In Scotland during 2020 There were **147** active game development companies (up from 96 the previous year), a **53%** increase.
- The games industry in Scotland is claimed to support **4,148** indirect jobs.
- Screen Business Report highlights that the direct contribution of games to UK GVA is over **£200 million**, and in total (including indirect and induced effects) of up to **£352 million**. It is estimated Scottish Games development companies contribute **£312 million** to the UK's GDP, and contribute **£129 million** in direct and indirect tax revenue. *Source: BFI Screen Business Report 2021*

There are few enterprises in the South in this sector, so opportunities should be focused on encouraging **entrepreneurship** and creating links with enterprise across Scotland to connect with our talent. The key Computer Games centres in Scotland are in Edinburgh, Dundee and Glasgow.

More | Source | Industry Body | Industry Body | Strategy

Crafts

200 **226** **£4.2m**

Crafts industry encompasses goods that are handmade by artisans or those skilled in a particular trade. Small businesses engaged in the craft trade include everything from galleries to handmade textiles to culinary products. Often, craft industry entrepreneurs operate independently and are not franchised. The industry usually relies on locally sourced supplies and community support to maintain a customer base

There are **200** craft enterprises operating in the South of Scotland, **81** in the Scottish Borders and **119** in Dumfries & Galloway.

Enterprises include glass and ceramics makers, decorators and finishers; furniture makers and other craft woodworkers; weavers, felting, knitters; metal working; goldsmiths, silversmiths and precious stone workers; musical instrument makers; painters and decorators; pattern makers; sheet metal workers; carpenters and joiners; smiths and forge workers and upholsterers.

Contemporary Scottish craft shows continuing trends:

- Top **3** disciplines found in Scotland continue to be textiles, ceramics and jewellery.
- Craft is a second career for over **two thirds** of makers.
- Craft continues to be a **female-dominated** industry (ranging from 79% to 82% across the years).
- Craft as a career continues to appeal to a broad range of ages.
- Most makers continue to be primarily based in the central belt, however there is a spread of makers across all the geographical regions of Scotland.
- Despite modest levels of income, makers continue to have high career satisfaction.
- Online craft purchases have grown from **5%** of buyers (332k people) in 2006 to **19%** of buyers (3.2m people) in 2010 to **33%** of buyers (10.3m people) in 2020
- There has been a dramatic growth in the number of people buying craft between 2006 and 2020 – with **73%** of the population buying craft in 2020, the sector has now entered the mainstream market.

Source: Craft Scotland

The sector is **growing**, but in volume and cheaper buys, rather than in the work of master craftspeople. Those in the sector are generally looking for training or advice to develop their craft including marketing and branding advice, how to photograph work, how to apply for funding and financial support for business and how to work with galleries and commissioners.

More Source Industry Body Strategy

Cultural Education

10 13 £105k

Cultural Education involves both learning through culture and learning about culture. It involves critical thinking, creativity and the development of original ideas and action. Culture, in all its richness and diversity, can be experienced as listening, playing, seeing, watching and interacting, performing, devising, designing and composing, making, writing and doing. Arts and cultural subjects in schools include English, Drama, Art and Design, Music, Dance, History and Performing Arts. Good cultural learning takes place across all subjects, including science and the humanities, and through technology.

10 enterprises operating in the South of Scotland, **3** in the Scottish Borders and **7** in Dumfries & Galloway although that rises to **61** enterprises when secondary activity is considered. The role of creative education in wellbeing is well documented and is one of the many reasons culture features in various government policies. Catalogues of case studies illustrate the benefits of creative learning to emotional wellbeing, not just for students but for teachers as well. Creative Learning Networks (CLN) have grown considerably in Scotland over the past seven years. In 2010/11, **7,833** people participated in **189** CLN funded activities across Scotland's local authorities. In 2015/16, **23,413** people participated in **626** CLN funded activities.

Culture Counts identified some key actions in this area:

- Local authority cultural plans could be developed and supported through existing Creative Learning Networks, thus strengthening relationships between schools and local artists and creatives.
- Streamline and extend opportunities offered through the current landscape of short life funding, programmes and pilots. Move the rhetoric of creative strategies to a level of commitment that meaningfully demonstrates that creative learning is valued.
- Elevate the roles of Creative Learning Networks and give them protected time, space, people and funding to further develop relationships between schools and local creative communities, in line with schools' individual cultural plans.
- There are symbiotic relationships between creative industry and tech in building capability in each other, complementing skill sets, complementing approaches and doing business together. By introducing young people early on to art, culture and technology as naturally interdisciplinary subjects, we can increase the opportunities for sustainable businesses that temper growth with wellbeing.

Source: Culture Counts

We can use cultural learning and education to fill gaps to identify and assist in **building our region's identity** and appeal to our young people, encouraging them to stay.

Source | Industry Body | Strategy

Design

110 **213** **£13.1m**

Design is a specialist set of skills that combines creative problem solving, empathy and technical skills. Well-known versions of professional design focus on communications, products, buildings, digital interfaces and services, alongside using design skills to find new solutions to organisational or social challenges. Design turns ideas into action and is a critical enabler of **innovation**. Design fills the gap between invention and application by creating tangible products, services and places that people want to buy and use.

110 enterprises operating in the South of Scotland, **48** in the Scottish Borders and **62** in Dumfries & Galloway

Design incorporates digital designers; graphic design; clothing design; illustrators; brand design, content design; industrial design; design engineers; service design and design management.

- In 2019 the design economy contributed **£97.4bn** in GVA to the UK economy, **4.9%** of total UK GVA. This almost matches the value of the hospitality and real-estate sectors combined.
- In Scotland, evidence illustrates a similar picture to the UK as a whole; with some **137,800** people, or **5.2%** of overall employment, in design occupations.
- With **9%** average annual growth in total turnover over the past 10 years, the design industry in Scotland has been the fastest growing sub-sector of the Creative Industries.
- Between 2017 and 2019 Scotland saw the fastest growth: its design economy grew **five** times faster than the Scottish economy.
- The design economy is a major employer. In 2020 there were **1.97 million** people working in the design economy – or one in twenty workers in the UK. Of these, **1.62** million were designers.
- Design is also growing in importance across the economy: **77%** of designers work in **non-design sectors** such as finance, retail and construction.

Source: Design Council

The presence of **design clusters** in local authority areas is also positively correlated with higher employment, business growth and wages for key design sectors. Investment in design clusters can unlock wider economic and social benefits for the places they are a part of.

More Source Industry Body Strategy

Fashion & Textiles

124 **1,801** **£161.4m**

Fashion and textiles sector involves everything from designer fashion seen on catwalks around the world, through to luxury knitwear, tailoring, workwear and beyond. It encompasses childrenswear, lingerie and swimwear, as well as military and medical uniforms. It also includes spinning, weaving, knitting and finishing through to carpets, rope and twine, nonwovens and technical textiles for a wide range of end uses including automotive, medical, industrial and protective applications.

There are **124** fashion and textiles enterprises operating in the South of Scotland (not including retail), **85** in the Scottish Borders and **39** in Dumfries & Galloway and is the largest creative economy sector by turnover.

- The industry in Scotland is regionally diverse and employs **8,200** people in **562** companies and contributes **£844m** to the economy.
- The textile industry in the South of Scotland accounts for **one-third** of the total output from the national sector.
- The largest concentration of fashion and textiles enterprises are in the Scottish Borders, including the **TD1**, **TD9** and **TD6** postcodes with manufacturing most prominent in Hawick and Selkirk.
- There are major skills challenges for the sector which could act as a constraint to future growth and sustainability.
- Of the region's fashion and textiles manufacturing enterprises, **76%** fully manufacture in Scotland and a further **12%** partially manufacture in Scotland. Where manufacturing is out-sourced the main reason is Skills (34%)
- **20%** of industrial water pollution world-wide is from the global dyeing and treatment of textiles.

Source: UKFT

67% of the industry does not have any employees dedicated to their **sustainable**, ethical and **environmental** strategic plans. **88%** of companies stated they need access to additional support and resources to ensure their sustainability targets and compliance are met.

The South of Scotland should capitalise on its rich heritage of both quality and luxury textiles, and of manufacturing networks supporting regional growth – and should strengthen expertise to attract **inward investment** and **exporting** opportunities.

More Source Industry Body Strategy

Film and Video

139 220 £5.4m

Film and video industry includes the technological and commercial institutions of film and television production companies, film studios, cinematography, film production, screen writing, pre-production, post-production, film festivals, distribution, cinema/exhibition, actors, film directors and other film crew personnel.

There are **139** film and video enterprises operating in the South of Scotland, **82** in Dumfries & Galloway and **57** in the Scottish Borders. The largest concentration of film and video enterprises is in Dumfries with **19**.

This is an exciting time for the Screen industries in Scotland. There is currently a boom in worldwide production in screen material and this is matched by a demand for new types of streaming services and platforms.

- In total, the screen sector in Scotland contributed Gross Value Added (GVA) of **£627 million** to Scotland's economy in 2021, providing **10,940** full time equivalent (FTE) jobs.
- Inward investment film and High-End TV production spend increased by **110%**, from **£165.3 million** in 2019 to **£347.4 million** in 2021.
- In total, an estimated **£617.4 million** was spent on the production of film, TV and other audio-visual content in Scotland in 2021, compared to **£398.6 million** in 2019, up 55% compared to 2019.
- The total economic impact for the South of Scotland in 2021 was **£42.5 million**
- There are **32** locations across the South of Scotland delivering cinema provision. Many of these locations are in harder to reach remote communities who have benefited from Regional Screen Scotland funding for digital projector and screening equipment.
- The UK's film and high-end television tax reliefs are widely recognised as the most transparent, inclusive and reliable production incentives in the world. Many inward investment productions choose the UK as a base to film and therefore Scottish based productions also benefit.

Source: Screen Scotland

The South of Scotland has a unique opportunity to realise our **shared ambition** for the screen sector by targeting and aligning resources, to work in collaboration and through shared delivery for inclusive economic growth. We will do this through a South of Scotland Screen Commission Partnership and the forthcoming South of Scotland **Screen Strategy** will outline actions to realise our ambition.

More Source Industry Body Strategy

Heritage

133 **1,231** **£33.8m**

Heritage is part of our everyday lives. People cherish places, and the values of heritage lie in defining and enhancing that connection of people to a place. It enhances regional and local distinctiveness. It forges connections between people and the places where they live and visit. The sense of place and strong cultural identity provided by the historic environment plays a crucial part in the sustainability of communities and in promoting a positive image of Scotland across the world. The historic environment could be said to be 'the cultural heritage of places' and is a combination of physical things (tangible) and those aspects we cannot see – stories, traditions and concepts (intangible). It comprises a variety of objects, structures, landscapes and features.

There are **133** heritage enterprises operating in the South of Scotland, **53** in the Scottish Borders and **80** in Dumfries & Galloway.

The heritage sector is closely aligned to the tourism sector and includes historic houses, monuments, museums, galleries, libraries and visitor attractions within the historic environment.

- The UK-wide Heritage industry is worth about **£50billion** per annum and supports over a million jobs.
- There are around **1.8 million** historic environment records in Scotland.
- The historic environment contributes more than **£4.9 billion** to Scotland's economy, supporting **69,600** FTE jobs (SHEA 2022).
- **16 million** people visited historic environment attractions in 2022 (Source: Moffat Centre).
- Spend by visitors to Scotland in 2022 was **£9.96 billion**.
- Volunteers provide **121,000 days**, an average of 7 days per volunteer to help conserve the historic environment, a contribution worth £14.7 million (Volunteering & Historic Environment 2016)
- **46%** of Scotland's historic environment organisations are run entirely by volunteers (Volunteering & Historic Environment 2016)

Source: HES

There is an opportunity for the South of Scotland to collaboratively capitalise on its **unique heritage** such as our Roman and Iron age assets, looking at new models of tourism which embrace a **sustainable** and **net zero** approach.

Source | Industry Body | Strategy

Music

147 **438** **£4.1m**

Music industry encompasses live music including professional, amateur and community/ participative music. It also covers the recording industry and music education. The music sector (live and recorded) spans all genres of music from classical to hip-hop.

There are **147** identified enterprises operating in the South of Scotland, **44** in the Scottish Borders and **103** in Dumfries & Galloway.

- According to previous research by Creative & Cultural Skills, the UK music industry employed **124,420** people in 2016. This includes those involved in live performance; production, retail and distribution of musical instruments and audio equipment; retail and distribution of recordings; recording; composition of musical works and music publishing; and promotion, management and agency related activities.
- Live performance is by far the largest employer, with just over **51,000** directly employed in this area (41% of the total). This is followed by production, retail and distribution of musical instruments and audio equipment (27%).
- EKOS report that there are over **10,000** people employed in music in Scotland - over **40%** as freelancers.
- Earnings and business turnover, on average, are not high and there is a high incidence of second jobs within the industry.
- The UK is the world's **third** largest music market.
- Scotland accounts for **11%** of the UK's live music revenue (greater than its 8% share of the UK population)
- The live ticketing sector in Scotland grew by **25%** in the last five years compared with growth of 17% for the UK as a whole

Source: Creative and Cultural Skills / UK Music

Sourcing robust and comprehensive information on the scale and structure of the music sector in Scotland is problematic. Official economic statistics provide poor coverage of the sector with activities often hidden within other categories of economic activity or missed altogether due to the **freelance** nature of music related work patterns. While this is an issue that affects all the creative industries (and other parts of the economy) it is particularly acute in music and further research in this area is required.

More Source Industry Body Strategy

Performing Arts

96 **267** **£7.1m**

Performing arts include a range of disciplines which are performed in front of a live audience, including theatre, music, and dance.

There are **96** performing arts enterprises operating in the South of Scotland, **36** in the Scottish Borders and **60** in Dumfries & Galloway. The South of Scotland has **22** theatre and performance venues, 13 in Dumfries and Galloway and 9 in the Scottish Borders. There are **24** dance studios across the South, 14 in Dumfries and Galloway and 10 in the Scottish Borders.

Performing arts includes organisations and enterprises promoting and producing live theatre, dance and music performances. Individuals include roles such as actors; dancers; theatre performers, theatre directors; screenwriters, stage managers; comedians and choreographers.

- Around a **third** of the sector comprises freelance workers who operate across several sub-sectors and hold multiple appointments.
- On average each freelance worker has **1.33** job/roles, whilst around a third hold 3 or more jobs. As a result, it is not uncommon for some freelance workers to operate in their chosen field of say, dance, drama, music, or writing, whilst also holding a fractional appointment in an associated or different sector.
- Portfolio Organisations – A significant number of organisations are operating across sub-sectors or operate in multiple capacities to the sector. For example, services such as theatre production, writing, education/training, equipment hire, venue hire, consultancy or professional services.
- Scottish theatre is a highly sophisticated sector, which has evolved and specialised over several decades. It incorporates sectors 'up' and 'down' stream of theatre production itself, much of which is located within Scotland.
- There is evidence of strong links between Scottish theatre companies and local playwrights, directors, actors, and other performers, as well as local support services (rigging, freight, construction, lighting, ticket management, digital media) and specialist professional services.

Source: Creative Scotland

Scottish theatre is specialised, well-represented nationally, and has strong vertical and horizontal **supply chains**, which connect up and downstream of performances.

Source | Industry Body | Industry Body | Strategy

Photography

186 **237** **£4.8m**

Photography includes professional photographers and photographic processing services. Services provided by industry operators include portrait and aerial photography, specialist photography, photojournalism and the video recording of special events. The industry excludes the processing of motion pictures for the TV industries.

There are **186** photography enterprises operating in the South of Scotland, **72** in the Scottish Borders and **114** in Dumfries & Galloway.

The Photography industry has recorded significant volatility over the past five years, mostly due to severe disruptions caused by the COVID-19 pandemic. Industry activity virtually came to a halt in March 2020. Thousands of events that would normally draw photographers were cancelled or delayed, including weddings and civil partnerships, graduations and sporting events. As a result, revenue is estimated to have plummeted by **47.5%** during 2020-21. However, revenue is forecast to rebound by **32.2%** in 2021-22 amid the current economic upturn due to significant pent-up demand.

- The largest segment is wedding photography at **38.1%** of industry revenue,
- followed by advertising and fashion photography with **18.1%**,
- commercial and industrial with **12.2%** and;
- school and graduation photography accounting for **8.9%**.
- Portraiture generates **6.2%** of revenue and the final **5.3%** is made up of 'other' which entails underwater, aerial, medical and biological photography and photomicrography

Source: IBIS World

The commercial photography segment, which is highly dependent on corporate clients' advertising budgets, is projected to expand, as improvements in business confidence are likely to support an increase in outsourced commercial photography services. Demand from the advertising and fashion industries is also anticipated to pick up, encouraging renewed growth in the industry.

Interlinkages between the industry and other areas of the creative sectors could be strengthened and developed. However, as photographers are primarily **sole traders** in a highly competitive market, they may not be engaged in regional networks and harder to reach.

Source Industry Body

Radio and TV

12 88 £514k

Radio and TV were the original broadcast media in the UK and their inclusion as a separate sub-sector of the Creative Industries is possibly outdated as TV now also straddles the screen sector under Film and Video. The explosion of streaming services over the past decade has also changed the landscape of broadcasting and some findings will feature here.

There are **12** radio and TV enterprises operating in the South of Scotland, **5** in the Scottish Borders and **7** in Dumfries & Galloway.

- Overall viewing of TV and has fallen from its pandemic peak, but Scotland continued to watch the most broadcast TV of any UK nation in 2021.
- The average amount of time people in Scotland spent watching TV and video content in 2021, across all devices, was **4 hours 48 minutes** per person per day.
- Subscription video-on-demand (SVoD) services saw a small uplift in Q1 2022 with **69%** of households in Scotland subscribing to at least one, up from 67% in Q3 2021.
- Broadcaster video-on-demand services had comparable levels of reach to SVoD, with most consumers using multiple streaming services. BBC iPlayer was the most popular streaming service in Scotland, used by **75%** of online adults and teens.
- In 2021 nearly **nine** in ten adults listened to the radio in Scotland for an average of **20** hours each week, with BBC network radio stations continuing to have the largest market share.
- Online radio listening now accounts for a **fifth** of listening hours in Scotland, at the expense of analogue and DAB.
- Smart speakers have not had the same impact in Scotland as they have across the UK overall, accounting only for **6%** of overall listening time compared to 10% in the UK.
- Music streaming in Scotland has now become as popular as listening to live radio on a radio, with a reach of **56%**. The music streaming service which accounts for the greatest share of listening is Spotify (**81%**).

Source: OFCOM

The BBC's **Across the UK** strategy aims to shift BBC operations away from London between 2022 and 2027 and make it more UK-wide. In Scotland, the BBC has made a range of commitments to improve representation and investment, and to develop new talent:

- The BBC will increase its operations in Glasgow, physically expanding its BBC Studios bases as well as moving the Technology reporting team there.
- The BBC will also double the number of nations' co-commissions, including those from Scotland, which appear on UK-wide channels.

Source | Industry Body | Strategy

Software and Electronic Publishing

127 **362** **£17.9m**

Software and Electronic Publishing impacts all organisations today who rely on computer and information technology to conduct business and operate more efficiently. Computer software is needed to run and protect computer systems and networks. Software publishing establishments are involved in all aspects of producing and distributing computer software, such as designing, providing documentation, assisting in installation, and providing support services to customers. Establishments in this industry may design, develop, and publish software, or publish only.

There are **127** software and electronic publishing enterprises operating in the South of Scotland, **66** in the Scottish Borders and **61** in Dumfries & Galloway.

CreaTech: is where creativity meets technology. CreaTech brings together creative skills and emerging technologies to create new ways of engaging audiences and to inspire business growth and investment.

- According to ONS data, only **45.2%** of companies have a website (down from 48.4% in 2018), reduced by the low incidence of websites among micro companies.
- The creative industries contributed **£115.9bn** in 2019, accounting for 5.9% of UK Gross Value Added. Within this, the 'IT, software and computer services' sub-sector contributed the most towards creative industries GVA in 2019 at **£47bn**, accounting for 40.6%. This sub-sector accounted for 53% of growth in creative industries GVA between both 2018 and 2019, and 2010 and 2019.
- This sub-sector also sits entirely within the Digital sector, which may explain similar trends seen in both the Creative Industries and Digital Sector.
- According to the 2019 Immersive Economy report from Digital Catapult and Immerse UK, the UK is the largest European market for immersive technologies including virtual and augmented reality. The report estimates that UK virtual reality market alone is expected to increase in value from £118 million to **£294 million** by 2023.
- PWC estimates that by 2030, immersive technologies could add up to **£62.5bn** of value and affect **400,000** jobs in the UK economy.
- PWC identified **1,250** active immersive specialist companies in the UK with growth opportunities for immersive technologies across architecture, construction, engineering, manufacturing, defence, entertainment, healthcare, training, and transport.

Source: Scottish Government / ONS / PWC

CreaTech embraces the commercial and cultural possibilities of virtual reality, augmented reality, **artificial intelligence**, virtual production, 5G, and other developing fields and the South of Scotland should **innovate** and support these emerging technologies through collaboration with initiatives such as **Techscaler**, delivered by Codebase.

More Source Industry Body Strategy

Visual Arts

335 **495** **£6.4m**

Visual arts sector encompasses publicly and privately funded programmes; commercial and not for profit activity; historical and contemporary work; traditional and experimental practice; gallery-based and publicly sited or participatory work; institutional, grassroots and independent models. The sector is ambitious in its reach, taking its work beyond galleries into the public realm and across a range of community settings. The work of many artists is informed by and informs other fields of creative economy practice including architecture, craft, design, dance, film, music, theatre and literature.

There are **335** visual arts enterprises operating in the South of Scotland, **111** in the Scottish Borders and **224** in Dumfries & Galloway, many of those are individual sole traders.

The Scottish Contemporary Arts Network carried out a mapping exercise of the visual arts sector in Scotland and found that:

- The majority of arts organisations are small in scale with small numbers of staff. The majority (**84%**) report income of less than **£425,000**, with **58%** reporting an income of **£200,000** or less. The majority of respondents report less than 10 members of staff and approximately one third have three or fewer.
- **86%** of organisations reported that they pay staff and artists the living wage and/or union rates, with just over half of the remainder having no paid staff at all.
- **More than half** of individual visual artists work from home.
- **Two thirds** of those working in the visual arts were female.
- The average income from all sources for all respondents was **£14,000** which is well below the national average.
- Earnings from visual artwork alone are similarly low with **63%** of self-employed respondents working up to or more than **35** hours per week in the visual arts.
- **55%** of self-employed respondents earn less than **£10,000** from their visual arts work with **31%** earning less than **£5,000** in their best year.
- **45%** of respondents estimate that over half the work they do is unpaid or voluntary.
- Nearly half of all artists have to supplement their visual arts income with outside sources.

Source: Scottish Contemporary Arts Network

Artists have the ability to **engage** and **inspire** us, testing out new ways of thinking and challenging us to see the world through different eyes. Traditional forms of painting, sculpture, printmaking and photography continue to be strongly represented and artists demonstrate a strong appetite for new forms including sound, text, installation, animation, film, digital and moving image.

More | Source | Industry Body | Strategy

Writing and Publishing

128 408 £10m

Writing and Publishing is the activity or trade of an author, writer, publisher or printer, including the commissioning, production and marketing of material. For book publishers that material includes books in all formats such as hardback, paperback, ebook, audiobook, as well as website content, social media, catalogues and other promotional materials.

There are **128** enterprises operating in the South of Scotland, **44** in the Scottish Borders and **84** in Dumfries & Galloway.

Writers in Scotland are committed, independent and highly skilled. Many are engaged in a spectrum of writing formats, genres and subjects. The practice of being a writer shares many traits with other artists, and the challenges encountered by writers and publishers mirror those of others within the creative industries.

- The Scottish Government estimates there are approximately **2,300** professional artistic creative writers in Scotland, of a total **6,000** writers across all formats, according to the Annual Population Survey.
- Of these, some **1,000** writers make their living primarily out of writing, whilst another **1,300** earn some revenue from writing as a secondary source of income.
- People in Scotland spend more time reading than any other culture-related leisure activity.
- Publishers in Scotland continue to play a major role in the propagation of Scottish literary works, adapting and responding to the changes that digital technology brings, as well as forming an industry extending far beyond Scottish works and Scottish borders.
- There is a wide and dynamic Scottish literature ecosystem comprised of individuals, companies and organisations that are voluntary, privately and publicly supported. It is through these organisations that all of the reading, writing and publishing activity is facilitated, encouraged, and delivered.

Source: Creative Scotland

The writing and publishing sector has a hugely important role in the South of Scotland by **educating**, inspiring, **challenging** and **interpreting** our society. Writers carry voices and thoughts of place beyond its boundaries to the rest of the world.

More Source Industry Body Strategy

Identified Priorities:

The following priorities were identified during the development of SOSE's 5-year plan and align with actions in the Regional Economic Strategy.

1. Exploring creative and cultural opportunities in **CreaTech** for enhanced collaboration and alignment with emerging technologies

2. Driving and supporting the creation of a **Creative Placemaking Framework** across the region as an opportunity for the Creative Economy to support **Community Wealth Building**

3. Supporting the development of the **Dumfries & Galloway Cultural Partnership** and the **Scottish Borders Creative Arts Business Network**, including embedding regional approaches and connections through their strategies and implementation

4. Focussing on **film in the South**, supporting screen developments and projects which address **Net Zero and innovation** in the industry

5. Continuing to **map the creative economy** in the South, exploring the potential to enable shared access for key partners

6. Facilitating collaboration in a **South of Scotland Roman and Iron Age working group** to maximise our cultural and heritage assets across the region, sharing approaches and developing new initiatives.

More Resources:

National Partners

More Creative Scotland

More Craft Scotland

More Historic Environment Scotland

More Museums, Galleries Scotland

More National Museums Scotland

More National Theatre of Scotland

More Scottish Government

More Screen Scotland

More Skills Development Scotland

More Textiles Scotland

National Strategies

More A Culture Strategy for Scotland

More National Strategy for Economic transformation

More Programme for Government

Local Strategies

More South of Scotland Regional Economic Strategy

More Dumfries & Galloway Cultural Strategy

More Scottish Borders Cultural Strategy

More SOSE 5-year Plan

Methodology…

Since 2022 South of Scotland Enterprise has been developing a mapping tool to help understand the Creative Economy in the South of Scotland to assist policy and intervention development. This guide is a visual representation of the data taken from the tool.

Data has been collated from various sources to help build a rich knowledge base with continuous validation and sense-checking. The data includes the 16 sub-sectors of the Creative Industries as defined by Scottish Government: advertising, architecture, crafts, design, cultural education, fashion and textiles, film and video, heritage, music, performing arts, photography, radio and TV, software and electronic publishing, visual arts, writing and publishing.

The tool is separate to SOSE's CRM system in that it aims to capture the whole of the creative economy in the South whereas our CRM system is there to manage our relationship with enterprises directly engaging with SOSE. Data sources include:

- Data from current SOSE CRM system
- Companies house
- Office of the Scottish Charity Register
- SOSE Inward investment database
- SOSE knowledge and understanding of the sector
- Ongoing research into various sub-sectors
- Partner organisation insights and research

The definition of enterprises in this guide includes; Sole Traders, Partnerships, Companies Limited by Shares or Guarantee, Limited Liability Partnerships, Scottish Charitable Incorporated Organisations, Trusts, Constituted Groups, Voluntary or Unincorporated Groups, and a small number of Public Sector run facilities. The people figure provided in this guide includes; individual sole traders and freelancers, full-time staff, part-time staff and volunteers.

It is accepted that the values in this guide will be conservative as there are gaps in the data, for example approximately 10% of entries have no turnover figure. Of the turnover recorded, **87%** of this value is from companies' house, OSCR or direct from the enterprise. The remainder are estimates from sectorial averages provided through sub-sector research.

Whilst every effort has been made to include all enterprises within the Creative Economy, there will be omissions and the data will continually evolve as new enterprises emerge, existing enterprises cease trading or sole traders and freelancers move away from the region.

This guide is intended to be a snapshot in time providing a resource that estimates the Creative Economy in the South of Scotland.

South of Scotland Creative Economy Guide 2023