



Estimating creative sector digital services exports

A report for the Creative Industries Federation

March 2018

Cebr

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Executive Summary

This is a summary of Cebr's report for the Creative Industries Federation on the economic contribution of the creative industries to the UK exports of digital services.

Scope and methodological overview

The report is largely based on official data provided by the Department for Digital, Culture, Media and Sport (DCMS), as well as a survey and interviews of the Creative Industries Federation Members.

The definition of the creative sector used throughout this report overlaps with the one applied by DCMS in its collection of 'DCMS Sectors Economic Estimates'. Although our goal was to align our methodology as closely as possible to DCMS definitions, we were also interested in capturing the views of the sector when it came to the actual quantification of exports. We relied on an extensive survey, interviews of the Creative Industries Federation members and on DCMS data to then build a more augmented measure of the value of Creative Sector Digital Exports (CSDE)

Economic contributions of the creative industries

We present two main sets of results for the economic impact analysis conducted for this report:

- The first set **relies on DCMS official services exports figures** to estimate the digital component of the creative sector's services exports.
- The second set of results goes **beyond the officially services exports**, as it attempts to capture 'hard to measure' trade flows. These includes services exports such as a free YouTube video, and are not currently included in official statistics due to the associated measurement difficulties.

On the economic contributions of the creative industries, our main findings are that:

- Based on DCMS data, **services exports of the creative sector stand at £22 billion in 2016**. IT, software and computer services and Film, TV, video, radio and photography were the largest export contributors. Under Cebr's alternative approach, **the wider services exports of the creative sector are valued at £31 billion**.
- In supplying its products abroad, the creative sector draws upon inputs from many sectors of the UK economy. **Our input-output modelling suggests that the creative sector's export multiplier is 1.48**. Based on the service export direct measure of £31 billion, we estimate that the **aggregate contribution of services exports to the UK economy amounts to £46 billion**.
- In terms of CSDE, Cebr's estimated **official figure stands at £15 billion**. This increases to **£21 billion when we apply the wider measurement of services exports**.
- As before, we used Cebr's input-output models to estimate the aggregate impact of digital services exports. Our models suggest that the CSDE **multiplier is 1.45**. Based on Cebr's estimated direct impact of £21 billion, we value the **aggregate contribution of digital services exports at £30 billion**.
- We have also analysed the export contribution of computer games, as defined by DCMS. According to our calculations, the true extent of **computer games' services exports could reach £262 million**, while the **digital component of these services exports could be valued at £257 million**.

1 Introduction

This is a report by the Centre for Economics and Business Research (Cebr), on behalf of the Creative Industries Federation, on the economic contribution of the creative industries to the UK exports of digital services.

1.1 Background and aims of this study

The Creative Industries Federation (the Federation) is an independent national organisation for the UK's creative industries, cultural education and arts. This body supports over 1,000 members, ranging from companies, organisations and institutions, to individual practitioners. One of the main goals of the Federation is to provide a strong voice when representing the creative sector's interests.

The purpose of the report is to provide the Federation an up-to-date picture of the creative industries contribution to the UK economy. More specifically, Cebr's research focuses on the digital services exports.

1.2 Scope and methodology

The definition of the creative sector used throughout this report is in accordance with the one applied by DCMS in its collection 'DCMS Sectors Economic Estimates'. According to the Government's 2001 Creative Industries mapping document, the Creative Sector is composed by industries "which have their origin in individual creativity, skill and talent and which have potential for wealth and job creation through the generation and exploitation of intellectual property". This definition includes the following industries:

- Advertising and marketing;
- Architecture;
- Crafts;
- Design, and designer fashion;
- Film, TV, video, radio and photography;
- IT, software and computer services;
- Publishing;
- Museums, galleries and libraries; and
- Music, performing and visual arts.

To produce the statistics on the contribution of the creative industries to the economy, DCMS mapped the definition above onto the relevant Standard Industrial Classification (SIC) codes. The SIC system provides the underlying data collection framework for much of the economic data produced by ONS, such as the UK business economy and national accounting frameworks.

DCMS' final figures were derived taking into account the creative intensity of each industry, i.e.: the proportion of creative jobs in a given industry. Only industries with a creative intensity above a specified threshold were considered to be part of the Creative Sector. The figure below presents the mapping exercise undertaken by DCMS.

Table 1: DCMS Creative Industries subsectors

Creative Industries Group	SIC	Description
Advertising and marketing	70.21	Public relations and communication activities
	73.11	Advertising agencies
	73.12	Media representation
Architecture	71.11	Architectural activities
Crafts	32.12	Manufacture of jewellery and related articles
Design, and designer fashion	74.10	Specialised design activities
Film, TV, video, radio and photography	59.11	Motion picture, video and television programme production activities
	59.12	Motion picture, video and television programme post- production
	59.13	Motion picture, video and television programme distribution
	59.14	Motion picture projection activities
	60.10	Radio broadcasting
	60.20	Television programming and broadcasting activities
	74.20	Photographic activities
IT, software and computer services	58.21	Publishing of computer games
	58.29	Other software publishing
	62.01	Computer programming activities
	62.02	Computer consultancy activities
Publishing	58.11	Book publishing
	58.12	Publishing of directories and mailing lists
	58.13	Publishing of newspapers
	58.14	Publishing of journals and periodicals
	58.19	Other publishing activities
	74.30	Translation and interpretation activities
Museums, galleries and libraries	91.01	Library and archive activities
	91.02	Museum activities
	59.20	Sound recording and music publishing activities
	85.52	Cultural education
	90.01	Performing arts
	90.02	Support activities to performing arts
	90.03	Artistic creation
	90.04	Operation of arts facilities

Source: DCMS

Although the focus of our study is the export contribution to the UK economy of the digital component of the creative sector, the starting point of our research was DCMS definition of creative industries. To derive the proposed results, we explored the possibility of combining DCMS creative sector economic estimates with the ones produced separately for the digital sector. However, this attempt was unsuccessful since the existing data do not offer the necessary level of granularity.

As a result, we complemented DCMS creative sector statistics with a survey deployed across the Federation members. In this survey, we asked companies a range of questions that allowed us to derive the creative industries' export propensity and digital intensity.

The survey was also useful in another dimension. While in this report Cebr's goal was to align our methodology as closely as possible to DCMS', we were also interested in capturing the views of the sector. One of the greatest concerns of the creative industries seemed to be that official statistics were not portraying the true extent of the sector's digital services exports. We came across this view in our initial discussions with the Federation, as well as a number of interviews with some of the more prolific the Federation members.

This view is anchored in the way official statistics are gathered. Over the last decades, technology has evolved immensely and, as a result, so did the way companies do business. We live in an era where some of the methods we use to trace trade flows are losing their relevance and ability to depict an accurate picture of reality.

For instance, it is not unusual to have a UK YouTube channel being watched by millions of viewers across the world. In practice, this represents an exchange of a service between the UK and foreign residents. This will however not be registered as a service export.

We acknowledge that measuring these flows is not an easy task, since they do not come with a price tag like typical goods and services. Despite these difficulties, we cannot overlook that considerable sums of advertising revenue are being allocated to such services. If companies did not attribute a value to exports of services of this nature, there would not be any demand to buy advertising space in platforms such as YouTube.

There is a separate range of difficulties undermining the ability of official statistics to capture the true extent of services export which goes beyond the complications around monetising 'free' services exports. The great majority of these flows are being facilitated by global conglomerates, such as Amazon and Google. These companies are experts in smoothing out their production process to operate as efficiently as possible, which in many cases entails using transfer pricing techniques.

It would be highly inefficient if a UK app developer had to contact Apple USA to offer his app on the American Appstore, instead of going directly to a European Apple subsidiary. As a result, some of these services transactions could be registered as domestic transactions, when in reality they should be captured as services exports. On top of this, since a considerable part of the narrative around these companies focuses disproportionately on their fiscal contributions, solutions are not being developed to measure these 'missed' exports and to value these companies for their role as digital exports facilitators.

There are plenty of other examples we could explore to support our argument around 'missed' services exports. These range from the way companies buy advertising space on YouTube, to the way gaming platforms are used to share video games. But regardless of how you see it, the message seems to be clear: in the context of a highly global and technological way of doing business, our research would not be complete if we were to disregard this side of digital exports.

Cebr's objective in this report is to try to measure and monetise these 'hard to capture trade flows', in order to include them as digital exports of the creative sector. We can argue that the precise way to monetise the value of content such as a YouTube video is to measure the utility derived by viewers, but this is highly impractical. An easier (and more feasible) approach would be to use the adverting costs as a proxy in an attempt to monetise the value of these services exports, but data availability issues raise a different kind of impracticalities. Given these difficulties, we used a survey to derive the apparent export propensity of the creative sector. We relied on the survey results, on a few interviews of the Federation members, and on DCMS data to then build a more precise picture of the value of the creative sector's digital services (CSDE) exports - but not departing from DCMS' definition of creative industries.

2 The economic contribution of the creative industries to the UK economy

This section provides an assessment of the importance of the creative industries to the UK economy in terms of exports. Using DCMS data, the Annual Business Survey (ABS) and the data gathered from the survey, we present the estimates of the direct and aggregate economic contributions of the creative sector as a whole and of its digital component. Our models quantify three types of benefit:

- **Direct benefits** – related to the sector or company under consideration, in this case the creative industries.
- **Indirect benefits** – increases in employment and economic activity along the supply chains supporting the direct activities of, in this case, the creative industries.
- **Induced benefits** – increases in employment and economic activity generated in the wider economy generated by the spending of direct and indirect employees of the creative industries on consumer goods and services.

It is important to note there that there are data limitations to the robustness of the subsector figures presented for each creative industry. For instance, in Section 2.2 we present two alternative methodologies for estimating the value of digital exports of the creative sector. While both approaches produce a consistent figure for the creative sector as a whole, they do produce considerable variation in estimates across the subsectors that constitute this whole. These inconsistencies at a subsector level are driven by the natural shortcomings of an approach which relies on a survey targeting the Federation members, which includes the standard frailties related to the sample size¹.

2.1 Exports of services

Trade is associated with significant productivity benefits. It increases the potential for businesses to exploit economies of scale by opening up new markets. This, by reducing unit costs of production, helps them to maintain or improve competitiveness on global markets. Economies of scale can also be seen in terms of improved productivity because they imply falling unit costs and increasing levels of value being generated at higher levels of output. Economies of scale, in other words, increase the overall supply potential of the economy.

The prime focus of this report is to estimate the size of the digital services exports of the creative sector (CSDSE). However, given the concerns around the ability of the official statistics to present an accurate picture of the true extent of the creative sector, our starting point was to estimate a new figure for the creative industries' services exports. This figure attempts to capture the 'hard to measure' trade flows we described in Section 1. We present below a description of the steps taken in our analysis.

- *Step 1 - Calculate the total export value in each creative industry:* The first step was to use DCMS' sectoral statistics on exports of goods and services to obtain a total export figure. This step was

¹ For sub-sectors such as Architecture and Crafts we only managed to get answers for less than ten companies. For more detail on sample size please see Table 7 in the appendix section of the report.

necessary since from the survey we can only derive creative industries' total export propensity², which includes goods and services.

- *Step 2 - Estimate the official export propensity:* Using the total exports derived in *Step 1*, DCMS sub-sectoral GVA statistics, and ABS-based Turnover-to-GVA ratios, we were able to estimate the export propensity for each creative industry.
- *Step 3 - Estimate the apparent export propensity:* Using the survey results, we were able to derive the ratio between the reported export propensity and the apparent export propensity for each creative industry. We applied these ratios to the official export propensities calculated in *Step 2*, to then derive the apparent export propensity for each creative industry.
- *Step 4 - Estimate creative industries' apparent total exports:* Combining DCMS sub-sectoral GVA statistics, ABS-based Turnover-to-GVA ratios, and the apparent export propensities from *Step 3*, we were able to estimate the apparent extent of the sector in terms of exports.
- *Step 5 - Calculate the share of total exports which corresponds to services:* Since the final goal of this research is to produce a statistic on services exports, we had to compute the share of total exports which corresponds to services only. This step relied on DCMS data (as mentioned in *Step 1*). The table below presents the results of this step.

Table 2: Services exports as a share of total exports by creative industry

Sub-sector	Service exports as a share of total exports
Advertising and marketing	100%
Architecture	95%
Crafts	0%
Design, and designer fashion	100%
Film, TV, video, radio and photography	95%
IT, software and computer services	99%
Museums, galleries and libraries	0%
Music, performing and visual arts	15%
Publishing	44%

Source: DCMS, Cebr analysis

- *Step 6 – Calculate the apparent service exports:* The final step of our analysis was to combine the total exports from *Step 4* with the ratios from *Step 5* to calculate a final figure for the apparent services exports. It is important to note that, as we are using the ratios from *Step 5*, we are assuming that the official breakdown of services exports vs. goods exports is representative even when we are capturing the true extent of the industry.

A caveat needs to be introduced at this stage. DCMS does not disclose services exports for the subsectors Crafts and Museums, galleries and libraries. However, Cebr attempted to estimate these figures. To produce the services exports for these sectors we have relied on a question in the survey which asks companies what percentage of their exports is digitally/electronically delivered. We applied this percentage to the figures we have in *Step 1* to derive Crafts and Museums' services exports. Our

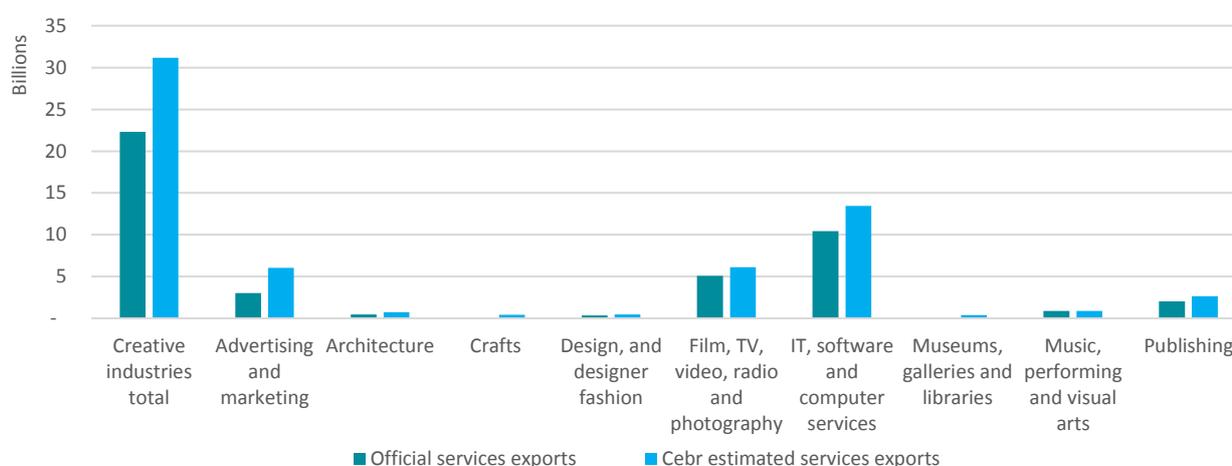
² Export propensity is measured as the percentage of a company's revenue which corresponds to exports.

assumption is that digitally/electronically delivered exports correspond to services only. We present the results of our analysis in the subsections below.

Direct impact

In 2016, creative industries exported services valued at £22 billion³. The biggest contributor was the IT, software and computer services subsector, followed by Film, TV, video, radio and photography. Figure 1 provides more detail on the creative sector's exports composition.

Figure 1: Creative sector services exports composition, DCMS figures and Cebr estimates, 2016



Source: DCMS, ABS, Cebr analysis

Using the survey results, we were also able to estimate an upper bound for the value of services exports. This includes the export of services which are not being currently captured as exports in governmental statistics, but that in practice should be registered as exports of services. This is in line with what we described in Section 1.2. Following this approach, we estimate the total value of the services exported by creative industries to stand at £31 billion.

The discrepancy between DCMS figures and our figures is driven by the fact that, on average, companies have reported a positive difference between their reported export propensity and their apparent export propensity. The greatest source of discrepancy is observed in the Advertising and Marketing subsector. In the latter, companies have reported that their apparent export propensity is two times bigger than their reported export propensity.

Separately, for subsectors such as Crafts and Museums, galleries and libraries, the official figure for services exports is not available.

³ The latest year for which DCMS figures are available is 2015. Using the observable trend, Cebr estimated the 2016 figures.

Aggregate impact

This subsection sets out our assessment of the wider multiplier impacts of the creative sector, including through indirect (supply chain) and induced (employee spending) sources.⁴

In supplying its products abroad, the creative sector draws upon inputs from many sectors of the UK economy. Our input-output modelling suggests that the creative sector's export multiplier for the UK is 1.48.

This means that for every £1 of exports generated by the creative industries in the UK, an additional £0.48 of value is supported in the wider economy through indirect and induced multiplier impacts. Based on Cebr's estimated creative sector's direct exports impact in 2016 of £31 billion, we estimate that its aggregate contribution, including direct, indirect and induced impacts, amounted to £46 billion in the same year.

2.2 Exports of digital services

In order to estimate the creative industries' digital services exports we employed three different approaches. All of these are consistent with DCMS data and the survey results, and are therefore robust estimates that can be seen as representing a range for the true value of the digital services exports for the creative sector. Below we describe in more detail the key differences between the three approaches.

- *Official (Cebr estimate based on DCMS data):* DCMS does not produce statistics on the value of digital exports for the creative sector. However, we attempt to estimate these figures based on DCMS official services exports figures, and on the average digital intensity derived from the survey. Essentially, we apply the subsector average digital intensities to DCMS official services export figures to estimate the digital component of the total services exports. It is important to note that our approach relies on an important assumption; we assumed that, on average, the digital domestic intensity and the digital export intensity are not significantly different.
- *Cebr (Approach 1):* Under this approach, to estimate the digital component of the service exports we also rely on the survey-based digital propensities. But instead of using DCMS official services exports statistics, we employ the services exports derived in *Step 6*, as described in Section 2.1. Therefore, in this approach we are taking into account the extended trade flows mentioned in Section 1.2.
- *Cebr (Approach 2):* In this approach we attempt to relax the digital propensity assumption described above. To do so, we use the survey results to estimate an export-focused digital intensity for each industry. These figures came from a survey question in which we asked companies what percentage of their exports is digitally/electronically delivered. The final step is to apply this proportion to the total exports of goods and services derived in *Step 1*, as described in Section 2.1. The underlying assumption in this approach is that only services exports can be digitally delivered.

In the table below we present the average digital intensities for each creative industry, under the two different approaches. Advertising and marketing, Design, and designer fashion, and Museums, galleries and libraries are the subsectors with the greatest discrepancy between the digital intensity in Approach 1

⁴ Note that the estimates of the macroeconomic impacts of the creative industries presented in this section do not take into account 'additionality'. The concept of 'additionality' in this context would be concerned with the impacts that are additional as a result of the existence of the creative sector and that would not have been generated elsewhere in the absence of the industry.

and in Approach 2; showing that for these sectors the digital domestic intensity is quite different from the digital export intensity.

Table 3: Digital intensity for the creative industries

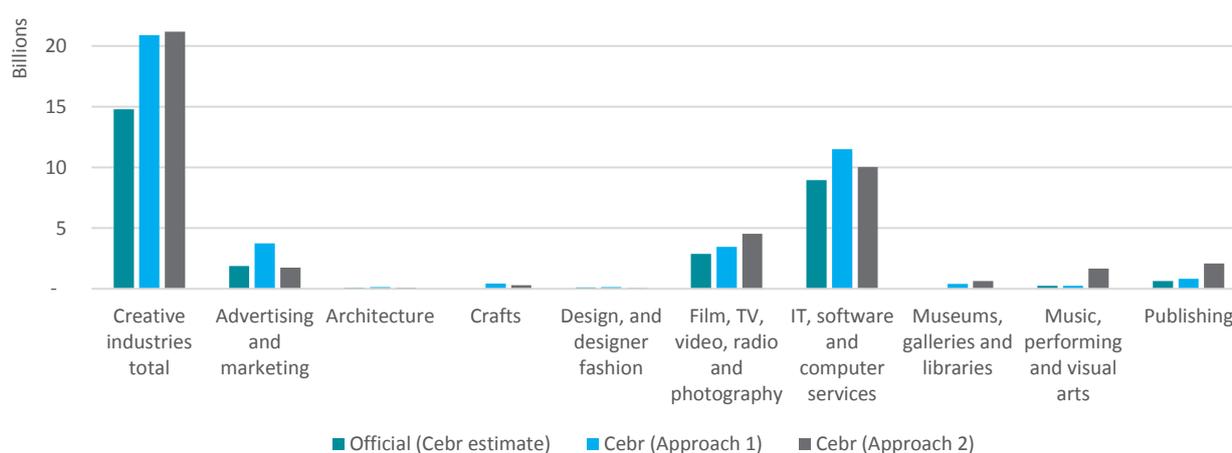
Sub-sector	Average digital intensity (Approach 1)	Average digital intensity (Approach 2)
Advertising and marketing	62%	29%
Architecture	19%	12%
Crafts	21%	6%
Creative industries total	41%	39%
Design, and designer fashion	33%	13%
Film, TV, video, radio and photography	57%	70%
IT, software and computer services	86%	74%
Museums, galleries and libraries	33%	51%
Music, performing and visual arts	28%	28%
Publishing	31%	35%

Source: Cebr analysis

Direct impact

Figure 2 presents our results for the digital services exports for the creative sector. The export composition does not vary significantly amongst approaches. IT, software and computer services remains in the leading position, followed by the usual second, the subsector Film, TV, video, radio and photography.

Figure 2: Creative sector digital services exports composition, Cebr estimated official figures and Cebr estimates (Approach 1 and 2), 2016



Source: DCMS, ABS, Cebr analysis

Cebr's attempt to estimate the official value of digital services exports produced a figure of £15 billion. This figure increases to around £21 billion under Approach 1 and Approach 2. This implies that there are no substantial differences between Approach 1 and Approach 2 when considering the total value of digital services exports for the creative sector as whole.

However, Approach 1 leads to a substantially higher value for the digital services exports of subsectors such as Advertising and marketing, and IT, software and computer services. While for the remaining sectors, Approach 2 leads to a bigger figure, particularly for the subsectors Publishing and Music, performing and visual arts.

Driving this is the fact that for the former group the digital intensity of their domestic activity is higher than the digital intensity of their services exports. While in the Publishing subsector the inverse seems to be the case. Music, performing and visual arts is a special case. In this sector, there seems to be no difference between the average digital intensity calculated under Approach 1 and Approach 2. The source of the difference is the fact that, according to DCMS data, only 15% of the total exports of this sector are services exports. While, according to the survey, 28% of their exports are digitally delivered.

Aggregate impact

As mentioned before, the value of the creative sector's digital services exports goes wider than its direct impact. In supplying its products abroad, the creative sector draws upon inputs from many sectors of the UK economy. Our input-output modelling suggests that the creative sector's digital services exports export multiplier for the UK is 1.45.

This means that for every £1 of exports generated by the creative industries in the UK, an additional £0.45 of value is supported in the wider economy through indirect and induced multiplier impacts. In 2016, based on the digital services exports direct impact of £21 billion, we estimate that the aggregate contribution of digital services exports, including direct, indirect and induced impacts, amounted to £30 billion.

2.3 A case study: the gaming industry

This section examines the economic contribution of the gaming industry to the UK economy in terms of exports. In order to do this, we base our analysis on DCMS' definition of the computer games sector. Computer games are a part of the creative industries. According to DCMS, these are included in the SIC codes 58.21 and 62.011, falling under the creative subsector IT, software and computer services.

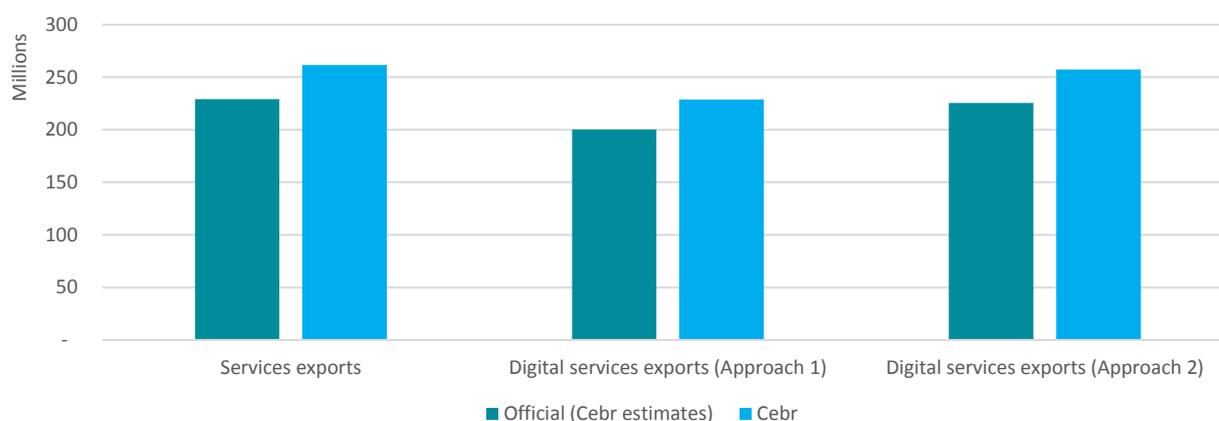
In this subsection we estimate the exports of services associated with computer games. While DCMS provides some sectoral statistics for computer games, it does not produce any official export statistics. We therefore estimate an official and a Cebr figure for computer games' services exports. We followed an approach similar to the ones described so far, which consisted in combining the following data:

- DCMS GVA statistics for the computer games sub-sector;
- ABS-based Turnover-to-GVA ratios;
- Official export propensity for the wider IT, software and computer services sector, as calculated in *Step 2* in Section 2.1;
- Apparent export propensity for the wider IT, software and computer services sector, as calculated in *Step 3* in Section 2.1, restricting it to the companies that mentioned that they operate in the video games industry;
- Share of total IT, software and computer services sector exports which corresponds to services, as calculated in *Step 5* in Section 2.1.

- Average digital intensity for the companies in the survey which operate in the IT, software and computer services sector, and mentioned that they operate in the video games industry; and
- Average export-based digital intensity for the companies in the survey which operate in the IT, software and computer services sector, and mentioned that they operate in the video games industry.

The results of our analysis are presented in Figure 3. We estimate official services exports in the computer sector to be just over £229 million. The digital component of these exports stands at £200 million, raising to £225 million when we use the average export-based digital intensity, instead of the overall digital intensity.

Figure 3: Computer games' services and digital services exports, 2016



Source: DCMS, ABS, Cebr analysis

The figure above also presents Cebr's own estimates for the value of services exports. According to our calculations, the true extent of computer games' services exports could reach £262 million. The digital component of these services exports varies according to which approach we select. As in Figure 2, Approach 1 relies on the average digital intensity as a whole, while Approach 2 uses the average export-based digital intensity. Under Approach 1, digital services exports in the computer sector stand at £229 million, versus £257 million under Approach 2.

Appendix

- Below we present the tables with the data behind the relevant charts throughout the report:

Table 4: Creative sector services exports composition, DCMS figures and Cebr estimates, 2016

Subsector	Official services exports (£ millions)	Cebr estimated services exports (£ millions)
Advertising and marketing	£ 3,028	£ 6,056
Architecture	£ 479	£ 746
Crafts	£ -	£ 432
Design, and designer fashion	£ 346	£ 477
Film, TV, video, radio and photography	£ 5,092	£ 6,114
IT, software and computer services	£ 10,452	£ 13,437
Museums, galleries and libraries	£ -	£ 397
Music, performing and visual arts	£ 873	£ 873
Publishing	£ 2,041	£ 2,626
Creative industries total	£ 22,309	£ 31,157

Table 5: Creative sector digital services exports composition, Cebr estimated official figures and Cebr estimates (Approach 1 and 2), 2016

Subsector	Official digital services exports (£ millions)	Approach 1 - Cebr estimated digital services exports (£ millions)	Approach 2 - Cebr estimated digital services exports (£ millions)
Advertising and marketing	£ 1,873	£ 3,746	£ 1,744
Architecture	£ 90	£ 140	£ 91
Crafts	£ -	£ 432	£ 305
Design, and designer fashion	£ 113	£ 156	£ 61
Film, TV, video, radio and photography	£ 2,879	£ 3,457	£ 4,540
IT, software and computer services	£ 8,945	£ 11,500	£ 10,025
Museums, galleries and libraries	£ -	£ 397	£ 644
Music, performing and visual arts	£ 241	£ 241	£ 1,673
Publishing	£ 637	£ 819	£ 2,094
Creative industries total	£ 14,777	£ 20,888	£ 21,176

Table 6: Computer games' services and digital services exports, 2016

Computer Games	Official - Cebr estimates (£ millions)	Cebr (£ millions)
Services exports	£ 229	£ 262
Digital services exports (Approach 1)	£ 200	£ 229
Digital services exports (Approach 2)	£ 225	£ 257

- Below we present two tables with a summary description of the survey:

Table 7: Survey summary description

Survey summary description	Number
Total responses	220
Clean responses	192
Start date	15/01/2018
Close date	09/02/2018

Survey summary description	Sectoral breakdown (clean responses)
Advertising and marketing	18
Architecture	4
Crafts	8
Design, and designer fashion	17
Film, TV, video, radio and photography	46
IT, software and computer services	12
Museums, galleries and libraries	12
Music, performing and visual arts	56
Publishing	19
Creative industries total	192