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Beyond Advocacy: Developing an Evidence-base for Regional Creative Industry Strategies

Abstract

The paper examines some aspects of the developing evidence-base for regional creative industry policy-making and argues that the focus of the current research base is disproportionately determined by the demand for evidence for advocacy purposes. It offers an evaluation that challenges the basis on which some of the central sector advocacy claims have been made and argues that unless the evidence-base is allowed to develop beyond advocacy, then the claims for evidence-based policy will be seriously compromised.

Keywords

Creative Industries, Regions, Evidence, Policy, England

Introduction

This paper aims to challenge the current and indeed long-standing over-preoccupation with evidence for advocacy purposes in regional evidence-based policy for the creative industries. Taking ‘advocacy’ to refer to the practices of sector representatives to raise awareness of their sector within policy and decision-making apparatuses, this paper contends that the adequate development of an evidence-base requires the formation of an informed consensus between the main agents in policy-making (policy-makers, sector representatives and policy researchers) about what constitutes appropriate evidence and how its quality is to be assessed and assured. This of course then implies the need for an infra-structure (for example, peer review processes, programme of commissioned research, etc.) to support this, although this is not a central concern of the paper. The paper argues that there is a pressing need for a clearly articulated and realistic assessment of the research that needs to be undertaken if policy is to be developed with credibility. Contrary to the current advocacy stance of much regional arts and cultural policy, the paper argues that if the potential of the creative industries is to be properly assessed, it is imperative that a proper distinction is made between cultural policy and economic development objectives with respect to regional development¹. The prevalent habit, of the last few years, of eliding these, inappropriately over-economises the arts and culture to the potential detriment of intelligent regional policy-making for them. Conversely, the over-aestheticised case for the creative industries potentially obscures the appropriate understanding of their specific character and potential regional economic impact².

The paper is divided into three sections. The first briefly reviews the evolving regional policy context and the emergence of the creative industries as a priority sector in regional development. It contends that the term ‘creative

industries' has functioned as an effective rallying point for advocacy purposes for a range of interests in the cultural sector but has serious limitations arising from that purpose in the transition from advocacy to policy and intervention. In the second, these limitations and their implications for policy are explored by examining employment data from a sample of English regions in which there has been very active advocacy for the creative industries – the North West, The South West and Yorkshire and the Humber³. The paper concludes that regional policy is still some way from being able to claim to be informed by reliable and valid evidence. The task of establishing that is currently obscured by competing aspirations as to the purpose of policy and an overly pragmatic attitude to the uses of data in forming it on the part of sector advocates. In particular, key claims of the advocacy case are judged over-extended by a critical scrutiny of the available evidence and this in turn appeals for a clearer articulation of the relationship between the arts and culture on the one hand and the creative industries on the other with respect to regional development objectives.

The Evolving Regional Policy Context

Since 1998 the English regions have enjoyed a modest degree of control over their economic development strategies. The introduction of Regional Development Agencies (RDAs⁴) brings a new tier of administration with functions of strategic leadership, priority-setting and resource allocation. Their principal objective is to reduce what are regarded by national government as unacceptably large inequalities in regional economic performance. The Government Office for each region monitors the work of the RDA in its region and they are collectively the responsibility of the national Department for Trade and Industry (DTI). The DTI sets broader statutory targets and approves the individual RDA Corporate Plans, including those areas over which they are permitted to exercise a modest degree of discretion. Since introduction, the RDAs have seen substantial real terms increases in the resources over which they have either direct control or influence and they have seen an increase in their co-ordinating role across a range of regional policy areas including *inter alia* skills and training, business support and competitiveness. Throughout their existence to date their core purpose has been and continues to be the promotion of regional economic growth.

One of their earliest actions was to develop Regional Economic Strategies drawing upon regionally based expertise. In 2001 the RDAs reviewed their economic development activities and re-fashioned them to work around a number of identified priority 'clusters'⁵. This approach was designed to get the RDAs closer to the business communities that they regarded as key, focus resources and enable economies of scale to be achieved through identifying cross-cutting areas of activity. The shift to such cluster-based approaches was heavily influenced by the work of Michael Porter on specialisation and regional competitive advantage (Porter, 1990). The identification of the clusters of specialised activities was partly influenced by a DTI sponsored piece of consultancy into levels of industrial specialisation across the regions (Trends Business Research, 2001) and partly influenced by pre-existing local business relationships and knowledge.

The introduction of RDAs was regarded by the existing structure of agencies in the cultural sector as an opportunity to further build upon a decade or more of locally based urban cultural development. The cause of culture-led regeneration in English towns and cities had grown substantially since the early 1980s with the support of a diverse range of national, European and local regeneration programmes. By the early 1990s and especially in the aftermath of the 1992 UK economic recession, culture-led regeneration had become multi-faceted. Initiatives ranged from programmes of community-based cultural activities at one level to the pursuit of the direct and indirect economic benefits of the arts in major town and city centre redevelopment planning at another (Bianchini and Parkinson, 1993).

Popularly, but by no means universally, many of these approaches favoured the adoption of the term 'cultural industries' as a direct attempt to shake off the traditional view of the arts and culture as economically dependent activities (Lewis, 1990, McGuigan, 1996). Advocates of the cultural industries working in a range of organisations including arts boards, heritage agencies, intermediate development agencies and arts businesses became adept at securing resources for cultural activities that went far beyond the traditional models of cultural subsidy, including training funds, business development grants and property investment. That success was partly occasioned by and contributed further to the development of a number of claims about the impact of cultural activity upon participants and participating communities. Under pressure from funders and planners, a substantial effort in the development of impact methodologies was made by think tanks, consultants and academics⁶. Much of this work focuses upon social and cultural outcomes but throughout there has also been a slim but steady effort devoted to the development of cultural economics, a discipline relatively absent from the UK policy field (Myerscough, 1988, Williams, 1997). However, the imperative to develop one has received a significant boost from a number of national policies and the development of a new regional policy framework.

Throughout the 1990s, a range of cultural agencies especially across the arts and heritage actively promoted the cause of the cultural industries. Whilst some of this work was geared towards the attraction of national cultural facilities to the regions, the principal focus of much of the work was local or sub-regional (cf.; Cornford and Robins, 1992; Griffiths, 1993; Bassett, 1993; Lim, 1993; Crewe and Forster, 1993; Oatley, 1996; Montgomery, 1996). In 1997, the new incoming Labour administration granted a policy fillip to the aspirations of the cultural industry advocates in its widely proclaimed championing of the 'creative industries'. Driven by an uncharacteristic energy, the newly re-named Department of Culture, Media and Sport (previously Department of National Heritage) set up a Creative Industries Task Force to provide advice on different aspects of policy. Unique in drawing together representatives of the creative industries sector with a range of government departments, the Task Force worked on a range of issues including television exports (DCMS, 1998b), the internet (DCMS, 2000), creative exports (DCMS, 1999a) and, - the regions (DCMS, 1999b). For the purposes of this paper, its most significant act

was to commission two substantial exercises into estimating the economic contribution of the creative industries to the UK economy (DCMS, 1998a, 2001).

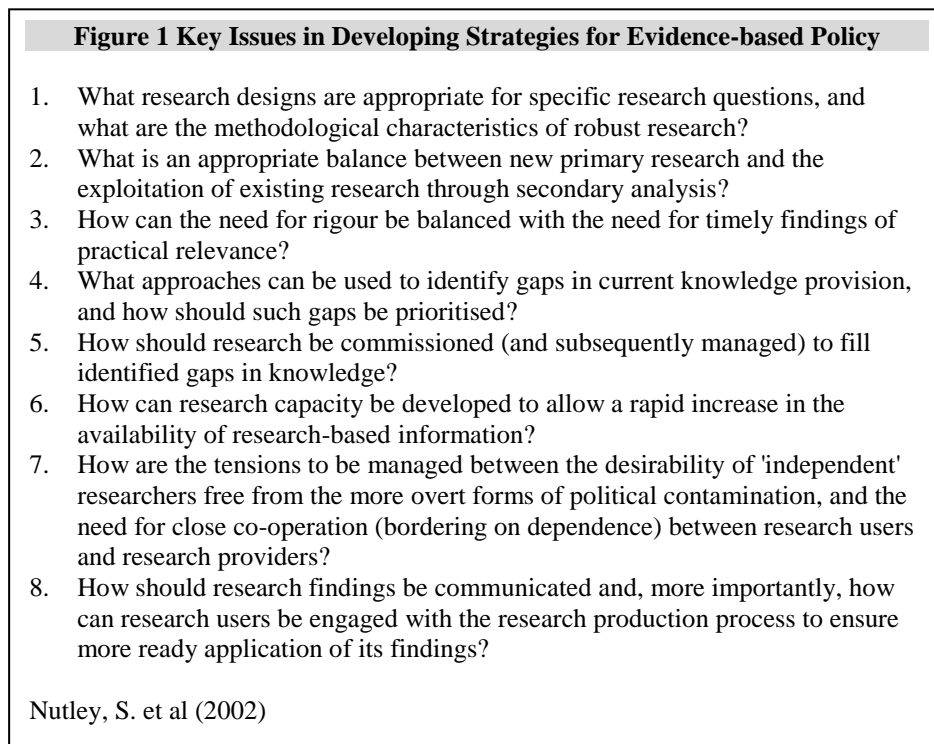
The Creative Industries and Evidence-based Policy

The production and very active dissemination of the Creative Industries Mapping Documents by DCMS both fed from and added to the impetus behind evidence-based approaches towards the cultural industries in urban and regional regeneration. Encouraged by the enthusiasm of the Department, the advocates for the cultural industries saw in this national sponsorship of the creative industries an opportunity to re-present the well-established local narratives of culture-led regeneration with a sharper-edged regional economic focus. As the previous section indicated, this enthusiasm coincided with the work being undertaken by RDAs to identify the strategically most important sectors for their respective regions. The RDAs found themselves being heavily lobbied at the earliest opportunity by a range of arts, heritage, sports and tourism interests keen to influence the development of regional policy.

The engagement of the RDAs with this re-tooled regeneration narrative has been something of a process of combined and uneven development. It would be fair to say that the RDAs have been hesitant to adopt the creative industries in the form in which advocacy have presented them⁷. In most cases the officer levels within the RDAs had, until very recently, little experience of dealing with businesses in the creative industries and even less of dealing with the complex organisational architecture of the cultural sector. But, to date, in a range of different ways, each of the English regions has adopted the creative industries as a priority sector. Some regions foreground this support in their work⁸. In others support is more muted. The effectiveness of the (largely) uncoordinated campaign to get the creative industries onto the RDA development agenda should not be under-estimated and it has been achieved through a combination of strong and vocal advocacy work backed in many cases by some form of evidence of economic impact. The growth of the evidence-based aspirations of regional public policy has been widely interpreted within the cultural sector as a need to evidence economic impact in particular. The concept of the creative industries provides an apparently eligible framework for this purpose.

In 1999 the British government issued a white paper *Modernising Government* (TSO, 1999) that heralded the rejuvenation of an evidence-based approach to policy-making. In particular it asserted that policies should be based on sound information and take account of the needs of end users. This re-invigoration of the role of evidence and research in the formulation of public policy has received attention from policy-makers and academics across a wide spread of public services, most notably, medicine and health care, education and the environment. This has in turn led to considerable reflection upon the issues raised by the relationship of research to policy including for some commentators deeply held doubts about the wisdom of placing research in such close proximity to public policy. In the UK the debates about evidence-based policy and practice are far from conclusive but a very useful

summary of the issues for the purposes of this paper is presented by Nutley *et al* (2002). This is set out in Figure 1 below.



The life histories of the national Creative Industries Mapping Documents would in themselves make fascinating, if maybe somewhat uncomfortable, case studies for scrutiny under the individual points identified by Nutley *et al*. However, the value of Nutley *et al's* approach is that it provides an analytical framework through which the current approach to the regional evidence-base for the creative industries can be interrogated. The first four of the points identified by Nutley *et al* can be taken together.

Each of the English RDAs has invested heavily in research and consultancy to identify its region's significant industrial clusters and sectors⁹. In many cases the RDAs have themselves been the sponsor of the research mobilised by the advocates of the creative industries sector¹⁰. However, given the number of mapping and economic assessment exercises that have been carried out what is clear is that there has been no consensus about the central issues concerning methodology, definitions of robustness and the balance between primary research and secondary analysis of existing data. However, a number of observations can be made as a starting point for working through them. The observations to be made with respect to these issues have implications for the remaining points identified by Nutley *et al* in terms of commissioning processes and the relationship between research and policy. What these observations clearly point towards is the need to achieve a better understanding of and consensus about what Boaz and Ashby (2003) describe as the 'signal to noise ratio' in evidence-based policy research among policy-makers and researchers¹¹.

The national Creative Industries Mapping Documents were seized upon by creative industry advocates as important and authoritative statements, the message of which could be translated to the regions. Their findings were presented as unambiguous - that the creative industries made a substantial absolute and relative contribution to the UK economy as measured by a range of variables including employment, contribution to Gross Domestic Product and balance of trade. This has become a central tenet of the general advocacy case in the regions.

The strength of this signal (the Mapping Documents contained little by way of methodological explanation, i.e., noise) could not be ignored. However, the strength of the transmission of this signal to the regions and its enthusiastic reception has created unrealistic expectations about the possibility of being as unequivocal about the creative industry contribution to regional economies. What encourages this conclusion is the experience of applying *The Regional Cultural Data Framework* (RCDF) to a sample of creative industry employment data for the English regions where advocacy has been particularly strong. This introduces a more equivocal note into the general case for support and exposes what should be argued is the unacceptable extent to which that general case was based on statistical artifice. However, and more importantly, what it does is to challenge the regional policy structures to enlarge their approach to evidence-based policy beyond advocacy into a fuller discussion of what constitutes an appropriate balance between methodological noise and meaningful policy signal. The need for this can be illustrated using a simple statistical analysis of employment data first using the original DCMS definition of the creative industries and then for the definition recommended by *The Regional Cultural Data Framework*.

Prior to the issue of the national Creative Industries Mapping Documents, the definitional issue had followed a broadly pragmatic course – what can be identified, what in some meaningful sense should be included, etc.? The resulting definitions tended to revolve around the arts, media, crafts and publishing. Good examples of some of the early discussion about the advantages and limitations of this type of definition can be found in O'Brien and Feist (1995, 1997). What the DCMS definition of creative industries offered was an analytical definition identifying the central role of intellectual property rights as the criterion for inclusion (DCMS, 1998a)¹² and developing a thirteen sub-sector approach from it. This led to the development of a definition that has been successful in raising the perceived economic profile of a set of activities that had previously been relatively submerged. Whilst this definition has been subject to subsequent critique, its purpose was to provide a tool for early policy formation within an evidence-based approach.

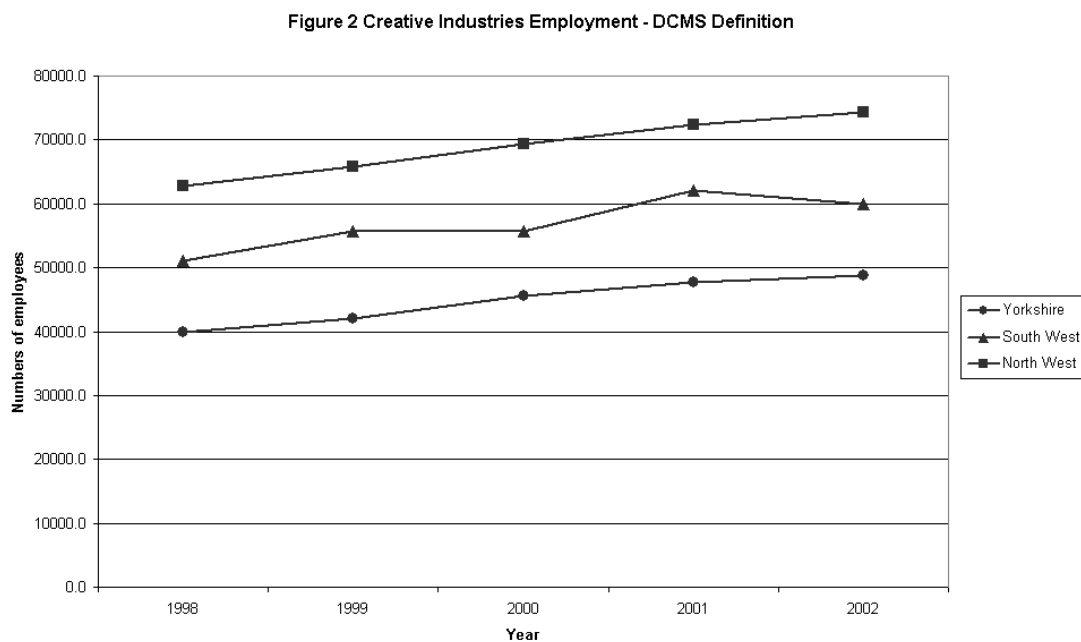
The principal difficulties with the original DCMS definition of creative industries can be set out in the following terms¹³. As the list of Standard Industrial Classification (ONS, 1997) codes (SIC) in Appendix 1 illustrates, belief in the robustness of data based on the DCMS definition inevitably requires acceptance of an unavoidable level of estimation. The definition is composed of those activities that have nominated 4 –digit SIC terms – film, television, radio, the arts (literature, visual, music and performing arts), publishing and software and estimates of the relevant proportion of a number of other codes for such activities as architecture, design and designer fashion

that are far less legible in SIC terms. There are problems with both categories. The first can be illustrated by reference to software and arts activities. The second, by how the definition proposes to deal with architecture and design.

Probably the most problematic code from a regional policy viewpoint is 7220 *Software consultancy and supply*. The DCMS definition assumes that 100% of the value of this code is attributable to the creative industries. A review of the December 2003 edition of the Companies House CD-ROM Directory (Companies House & DTI, 2003) indicates the existence of more than 63,000 companies registered in the UK working under this classification. A random search for more details of individual companies strongly suggests that the activities of companies within this classification goes significantly beyond its literal description and includes generalised computing services. Since it would be difficult to argue that these constitute activities driven by intellectual property rights, either the definition would have to be changed or there would need to be a fuller articulation of the role of such services in the creative sector. Again, taking 100% of the value of this very wide code gives an impression of size that is unjustified.

Whilst this critique can be made of the original Mapping Studies approaches, it has to be acknowledged that this was the first systematic attempt to define the creative industries as opposed to, say, the cultural industries. To that extent this constituted new territory. In addition, the issue of disaggregating the relevant fractions of the SIC codes would have had few guides and an element of estimation would have been necessary.

To get an indication of the DCMS definition translates into economic indicators, Figure 2 compares the numbers of employees in the creative industries for a sample of English regions¹⁴



In all three regions the creative industries are shown to experience quite sharp growth in the numbers of employees over the period 1998-2002 with 22%, 17% and 19% for Yorkshire, the South West and the North West respectively. What tempers judgements about this growth pattern is that 7220 *Software consultancy and supply* accounts for between 23 and 31% of the total employment of the creative industries in these regions using the DCMS definition. Moreover each of the three sample regions show both absolute and relative growth in employment for this code. In Yorkshire the relative share of creative sector employment attributable to this code grows from 23% to 26% over the period 1998-2002, in the South West from 28% to 30% and in the North West from 27% to 30%. This suggests that the resultant growth patterns are in an important respect the product of classification rather than the observable behaviour of the relevant economic activity.

Equally as problematic from a cultural sector advocacy point of view are the corresponding figures for the combined arts activity classifications. Combining 9231 (*Artistic and literary creation and interpretation*), 9232 (*Operation of arts facilities*), 9234 (*Other entertainment activities not elsewhere classified*) and 9272 (*Other recreational activities not elsewhere classified*) gives a composite category covering literature, music, performing arts and visual arts, together with related venues, etc. The relative share of employment attributable to these activities varies between 10 and 12 % of any of the sample region's given creative industries employment. The relative shares over time remain relatively static, moving from 11% to 12% in Yorkshire and the South West over the period 1998-2002 and from 10% to 11% in the North West.

The economic contribution of the architecture sector is arrived at by taking 25% of SIC code 7420 *Architectural and engineering activities*. 7420 is quite a wide-ranging code and has a large quantitative value relative to other codes. The accuracy of the co-efficient then becomes crucial because even small variations in percentage terms produce large differences in value. The same can also be said for 7484 *Other business activities not elsewhere classified* which is used as a proxy for the design sector. Again, this is a code with a large relative value making the accuracy of the co-efficient crucial. Potential wide variations in value make the business of informing regional policy-making about these sectors difficult. Indeed with the levels of estimation required and the need in some cases to have activities represented by a kind of statistical proxy, it is very difficult to see how the resulting data can identify a meaningful object for regional policy to work with.

The voice of the arts has been important for the promotion of the creative industries in national and regional policy. However, the influence of that voice is disproportionate to the arts absolute and relative size in employment terms. From this brief illustration, some versions of the arts-led advocacy approach to the creative industries must be judged as compromised. Moreover, other areas of the creative industries which are considerably more economically significant appear systematically under-represented in regional policy. A good example here might be the publishing sector. There are wide variations in the regional presence of the publishing industries¹⁵. In the

three sample regions publishing activities have accounted for between 13% and 27% of creative industries employment over the period 1998-2003. For example, over that period publishing fell from 27% to 23% of creative sector employment in Yorkshire, from 15% to 13% in the North West and has remained static at 20% for the South West. What makes this problematic is that the publishing sector is more legible in SIC terms. Therefore, its relative, and in some areas absolute decline in terms of employment is a major challenge to the generalised advocacy narrative of growth. This obviously has implications for public policy that do not appear to be being addressed.

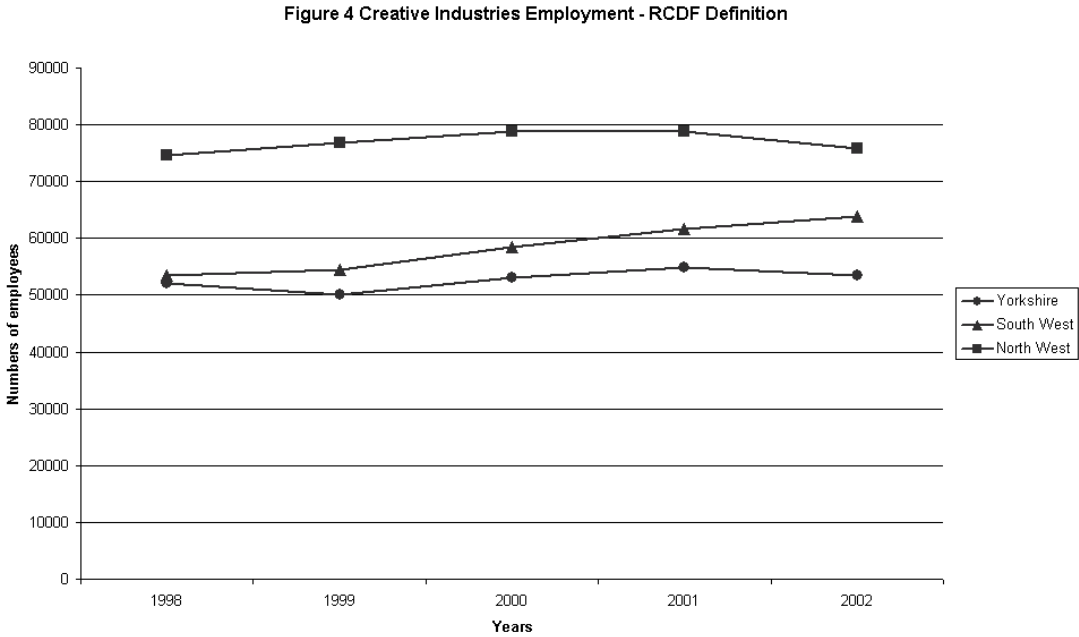
To overcome some of the anomalies, uncertainties and threats to the integrity of regional policy-making thrown up by the DCMS definition, the consultants commissioned to develop the RCDF adopted a number of key principles in developing the definition of the cultural sector. The first, not for discussion here, concerns the definition of the cultural sector per se (Burns Owen Partnership *et al*, 2002). The second is the broader division of the cultural sector into domains – sets of activities united by common industrial characteristics. The framework proposes seven domains as set out in Figure 3 below with indicative areas of activity.

Figure 3 Regional Cultural Data Framework Domains	
<i>Audio-visual sector</i> Film and video Radio and TV Music Advertising	<i>Books and press</i> Publishing Journalism
<i>Performance</i> Theatre Dance halls	<i>Visual Arts</i> Visual arts Architecture Design
<i>Sport</i> Sports activities Sports facilities Recreational activities	<i>Heritage</i> Museums Libraries Archives
<i>Tourism</i> Travel agency activities Hotels Amusement parks	

The third is that once activities are identified for inclusion, the framework should adopt a prudent approach to the inclusion of specific cognate SIC codes. Thus for example, *7220 Software consultancy and supply* is omitted since there is currently no reliable way of determining with any degree of accuracy what proportion of the activities within this code can be allocated to the creative industries. As far as possible, the framework tries to reduce the number of codes that require the development of a co-efficient¹⁶. This has the effect of narrowing the range of activities encompassed by the term creative industries but improves their legibility.

Under the RCDF recommendations, the four domains, Audio-visual, Books and press, Performance and Visual art cover the creative industries. The streamlining of the thirteen DCMS sub-sectors into four domains adds a further degree of reliability at the regional level by multiplying the number of possible cases used for statistical sampling albeit at the expense of some sub-sectoral nuance. The full set of SIC codes for the RCDF definition of the creative industries is set out in Appendix 1.

Figure 3 sets out the employment trends for the creative industries in the sample regions using the Regional Cultural Data Framework definition.



The first point to note is that the greater clarity of definition reduces the impact of statistical artifice. The absence of *7220 Software consultancy and supply* appears to reduce the overall rate of growth for the North West and Yorkshire and the Humber whilst the growth rate for the South West under the RCDF definition is broadly in line with the picture presented under the DCMS definition. Thus for example, the modest growth trends in the North

West and Yorkshire are heavily influenced by some growth in the Audio-visual sector, partly cancelled out by reductions in the employment in Books and Press. In the South West, growth is substantially due to developments in the Books and Press domain. The greater legibility of the sector under the RCDF means that knowledge of these trends possesses greater security and is therefore more reliable from a policy viewpoint. Future iterations of this framework might address the issue of fractional codes on the basis of range estimates using alternate corroborating data sources.

Conclusions

In each region, the active promotion of the creative industries sector has in the main, but not exclusively been undertaken by organisations representing the arts. However, this advocacy has not sat easily with the economic performance agendas required of RDAs. Current data collection and analysis exercises are still trapped within an advocacy purpose that inhibits the development of a fuller sense of either the potential contribution of the arts or the creative industries sector based upon a more differentiated and nuanced appreciation of the data and intelligence. It should be regarded as significant that the arts lobby mostly uses the creative industry tag. Very few other sector bodies representing other components of what are taken to be the creative industries use the tag in their sector promotion work. The publication of the national Creative Industries Mapping Documents in 1998 and 2001 were rapidly adopted as advocacy tools in the search for both a bigger seat at the regional table for the arts, and inevitably, increased access to regional resources. However, since the RDAs are primarily concerned with the economic well being and growth of the regions, it is here that there is potential for complementarity between the policy objectives of the cultural sector and the regional objectives of the RDAs. However, the nature of that complementarity needs to be based upon an agreed approach towards evidence, its validity and role in policy-formation. The current danger is that regional policy will potentially misfire unless advocacy for the creative industries is prepared to rise to the challenge of developing a credible evidence-base without allowing judgements of the attempts made so far to be circumscribed by the pressure to deliver yet more advocacy.

The RDAs are aware of this potential mismatch¹⁷ and it is very difficult to disentangle the broader message about the value of the creative industries from the voice of those who transmit it. However, this is not the principle problem. There is no reason why the arts sectors should not champion the creative industries¹⁸. The principal difficulty lies with formulating a definition of the evidence-base that can satisfy the range of distinct perspectives on the role of the creative industries in regional economic development. Until all parties can sign up to a balanced view of the signal to noise ratio, the risk is that the creative industries sector and its constituent activities will not be adequately represented in regional policy. The RCDF represents the first systematic attempt to set out explicit and transparent protocols for developing the regional evidence-base for this purpose.

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¹ The paper is not intended to review all the perspectives on the creative industries in regional development, for example Florida (2002). The concern here is simply with the way in which advocates of the creative industries in England have mobilised economic arguments about their impact.

² In a recent paper Garnham (2005) addresses similar concerns and concludes that economic impact is a misplaced basis for developing arts policy. The present author shares that view with the qualification that the absence of a credible economic case does not exclude the possibility that the traditional objectives of arts policy may have a constructive relationship to build with broader economic imperatives.

³ Here, the paper offers some reflections on how a new regional framework for collecting and presenting data for the cultural sector including the creative industries provides a starting point for developing a more differentiated and nuanced approach to supporting policy-making for the creative industries in regional development. The Department for Culture, Media and Sport commissioned the Regional Cultural Data Framework (RCDF) in 2002 at the request of the new Regional Cultural Consortia. Subsequent to the initial report on the RCDF a revised version has been published by the DCMS as the DCMS Evidence Toolkit (www.culture.gov.uk/global/research/det/). The author was a member of the national Steering Group for the development of the framework in its RCDF phase.

⁴ The Regional Development Agencies were established by Act of Parliament in 1998 and began operations in 1999. The London Development Agency was established in 2000.

⁵ The work on clusters in regional development is vast and no attempt will be made here to summarise it, but to note in passing what appears as a growing anxiety in the academic regional policy literature about the apparent proliferation of 'fuzzy concepts' (Markusen, 2003). The author has some sympathy with this point of view with regard to the terms 'cluster' and 'creative industries'.

⁶ For example, Matarasso (1996, 1997) and Williams (1996).

⁷ Some RDAs, for example London and the North-west appear to broadly accept the definition developed by the DCMS that has been widely adopted by advocates. By contrast, the RDA in Yorkshire adopted a related approach that emphasised the 'digital' elements over the 'creative' although this may now be changing.

⁸ London has been particularly enthusiastic about the role of the creative industries (London Development Agency, 2004). In other cases, and with some justification, the creative industries have only been adopted in terms of their relationships to other industrial sectors, most notably, the software and new media sectors, for example as in Yorkshire and the Humber.

⁹ This work takes a number of forms but typically includes regional interrogation of national economic and labour market datasets, consultations with industry and contributions from sector experts. It is typically presented in a number of forms including baseline studies, mapping exercises and economic impact assessments.

¹⁰ To date, the author is aware of RDA commissioned or co-commissioned research work on the creative industries in the North West, South West, East Midlands, Yorkshire and the Humber, the South East, London and the North.

¹¹ This refers to the extent to which the provision of timely, relevant and clear intelligence for policy purposes (signal) may entail some calculated compromise in methodological robustness and/or acceptance that it is not possible to achieve a perfect match between research and policy purpose within the current methodological or resource constraints (noise).

¹² The role of IPR is not without its own problems. See Howkins (2002) for a discussion of this point.

¹³ The paper does not repeat the now very familiar difficulties with the application of Standard Industry Classifications to the cultural or creative sectors. For further discussion of these see Pratt (1997), Burns Owen Partnership *et al* (2002) and Centre for Cultural Policy Research (2003).

¹⁴ The regions are the North West, the South West and Yorkshire and the Humber. These regions have been selected because in each case there has been vigorous advocacy for the creative industries. The source of data is the national Annual Business Inquiry (London: Office for National Statistics), the annual survey of employers.

¹⁵ Formed by combining 2211 (*Publishing of books*), 2212 (*Publishing of newspapers*), 2213 (*Publishing of journals and periodicals*) 2214 (*Publishing of sound recordings*) and 2215 (*Other publishing*).

¹⁶ This cannot be dispensed with altogether in two types of case. Where there is a 5-digit SIC code that can with confidence be allocated wholly to the creative industries, a co-efficient is still required for application to the relevant 4-digit SIC code. Some 4-digit codes have to be shared across domains and this requires an unavoidable level process of estimation.

¹⁷ At least one RDA (that for South East England) explicitly makes it clear in its public information that whilst it regards the cultural development of the region as important it does not directly fund culture for cultures sake. See http://www.seeda.co.uk/seeda_documents/corporate_&_strategy/docs/Culture.pdf. (Accessed February 2004)

¹⁸ The relative lack of support for the creative industry concept from some of its other constituent sectors is more of a persistent problem.

Appendix

Creative Industries Definitions					
1992 SIC Codes		Definition (%)			Sector ²
		RCDF	Domain ¹	DCMS	
1771	Manufacture of knitted and crotchetted hosiery			X (0.5)	DF
1772	Manufacture of knitted and crotchetted pullovers, cardigans etc			X (0.5)	DF
1810	Manufacture of leather goods			X (0.5)	DF
1821	Manufacture of workwear			X (0.5)	DF
1822	Manufacture of outerwear			X (0.5)	DF
1823	Manufacture of underwear			X (0.5)	DF
1824	Manufacture of other wearing apparel and accessories NEC			X (0.5)	DF
1830	Dressing and dyeing of fur; manufacture of articles of fur			X (0.5)	DF
1930	Manufacture of footwear			X (0.5)	DF
2211	Publishing of books	X (100.0)	BP	X (100.0)	P
2212	Publishing of newspapers	X (100.0)	BP	X (100.0)	P
2213	Publishing of journals and periodicals	X (100.0)	BP	X (100.0)	P
2214	Publishing of sound recordings	X (100.0)	BP	X (100.0)	MVPA
2215	Other publishing	X (100.0)	BP	X (100.0)	P
2221	Printing of newspapers	X (100.0)	BP		
2223	Bookbinding and finishing	X (100.0)	BP		
2224	Composition and plate-making	X (100.0)	BP		
2231	Reproduction of sound recording	X (33.0)	A-V	X (25.0)	MVPA
2232	Reproduction of video recording	X (33.0)	A-V	X (25.0)	F
2233	Reproduction of computer media			X (25.0)	S
2464	Manufacture of photographic chemicals	X (100.0)	A-V		
2465	Manufacture of prepared unrecorded media	X (100.0)	A-V		
3220	Manufacture of television and radio transmitters, etc.	X (50.0)	A-V		
3230	Manufacture of television and radio receivers, etc.	X (100.0)	A-V		
3630	Manufacture of musical instruments	X (100.0)	A-V		
5143	Wholesale of electrical household goods	X (100.0)	A-V		
5147	Wholesale of other household goods	X (12.5)	A-V		
5245	Retail sale: electrical household goods	X (100.0)	A-V		
5247	Retail sale of books/newspapers etc	X (100.0)	BP		
5248	Other retail sale in specialised stores			X (5.0)	AAM
5250	Retail sale of second-hand goods in stores			X (5.0)	AAM
7220	Software consultancy and supply			X (100.0)	S
7420	Architectural and engineering activities	X (25.0)	VA	X (25.0)	AR
7440	Advertising	X (100.0)	A-V	X (100.0)	A
7481	Photographic activities			X (25.0)	MVPA
7484	Other business activities not elsewhere classified			X (25.0)	DF
9211	Motion picture and video production	X (100.0)	A-V	X (100.0)	F
9212	Motion picture and video distribution	X (100.0)	A-V	X (100.0)	F
9213	Motion picture projection	X (100.0)	A-V	X (100.0)	F
9220	Radio and television activities	X (100.0)	A-V	X (100.0)	TVR
9231	Artistic and literary creation and interpretation	X (100.0)	VA, BP, P	X (100.0)	MVPA
9232	Operation of arts facilities	X (100.0)	P	X (100.0)	MVPA
9234	Other entertainment activities nec	X (100.0)	P	X (50.0)	MVPA
9240	News agency services	X (100.0)	BP	X (100.0)	P
9272	Other recreational activities not elsewhere classified			X (25.0)	MVPA

¹ VA = Visual arts, BP = Books & press, A-V = Audio-visual & P = Performance

² A = Advertising, AR = Architecture, AAM = Arts and Antiques Markets, D = Design, DF = Designer Fashion, F = Film, MVPA = Music, Visual & Performing Arts, P = Publishing, S = Software, TVR = TV & Radio