EXECUTIVE SUMMARY

This research report from the Flanders DC - Antwerp Management School Knowledge aims to produce a renewed economic impact measurement of the Creative Industries in Flanders. This report further utilizes the methodology established in the previous impact measurements performed in 2011 and 2014, and uses its definition of the Creative Industries in Flanders as the starting point (Guiette, et al, 2011):

"The Creative Industries in Flanders are those sectors and activities relying on the input of human creativity to produce economic, societal and symbolic value - throughout the links of creation, production, dissemination and consumption in the value chain – and contributing to the expansion of Flanders' creative advantage."

Based upon this demarcation, the Creative Industries in Flanders have been divided into 12 separate sectors: architecture, audiovisual industry, communication and advertising, cultural heritage, design, fashion, gaming, music, new media, performing arts, publishing, and visual arts. In order to delineate the breadth and depth of the respective 12 industries, their value chains have been mapped by identifying their core and supporting creative value chain actors in the previous economic impact measurement. This analysis provided the starting point for a renewed measurement, based on the new reference year of 2013.

Well-developed and flourishing Creative Industries help advance Flanders. This research report is part of the goal of the Flanders DC – Antwerp Management School Knowledge Center to make creative Flanders more entrepreneurial. With this report, we therefore aim to obtain an enhanced insight into the current status of the separate creative sectors and in the dynamics that have emerged in the creative industries as a whole and in each of the different sub-sectors separately since the last measurement. The current research seeks to 1) update the value networks of each of the sub-sectors of the Creative Industries, 2) update the description of each of the different stages of the value networks and its interactions with other stakeholders, 3) achieve a new analysis of economic impact (this time with the reference year being 2010 – the year of the most recently available figures), and 4) compare the reported economic impact of the creative industries between the reference years 2010 and 2013.

As in the previous study, the impact of self-employed, employers, employees, total turnover and total value added is calculated by sector. Figures are both top-down (based on the NACE-BEL nomenclature) and bottom-up (based on a combination of sources gathered from each of the various sectors). Using both the top-down and bottom-up approaches, one total result was calculated for each variable. For this calculation, the researchers chose between the top-down and bottom-up result for each link in the different sectors. This choice is based on the judgment of the researchers of the gathered results in terms of completeness, accuracy and reliability.

This methodology resulted in following results for the Creative Industries in Flanders in

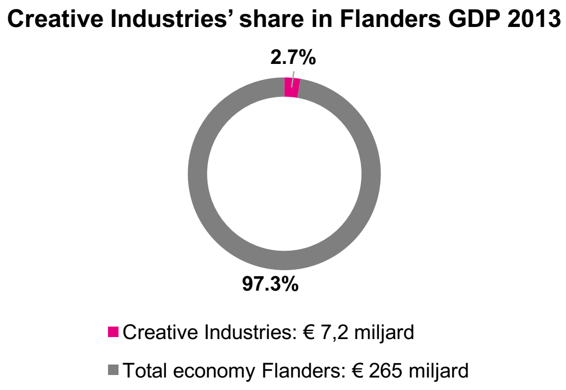
2013:

Self-employed #	Employers #	Employees (FTE)	Turnover (billion €)	Added value (billion €)
53.477	8.169	69.983	23,6	7,2

Creative Industries in 2013

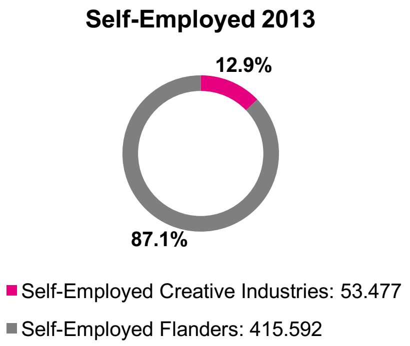
Based upon this analysis, Creative Industries represent 2,7% of Flanders' Gross Domestic (Regional) Product. Creative Industries represent 12,9% of all self-employed (in primary activity) in Flanders. The following charts highlight the Creative Industries' contribution.

Creative Industries represent 2,7% of Flanders Gross Domestic Product *



*Flemish Region + 50% Brussels Capital Region *Source:* National Institute for the Social Security of the Self-employed; Flanders DC – Antwerp Management School Knowledge Center.

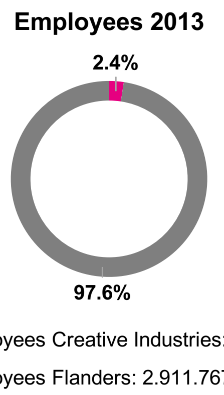
Creative Industries represent 12,9% of all self-employed (in primary activity) in Flanders *



* Flemish Region + 50% Brussels Capital Region Source: National Institute for the Social Security of the Self-employed; Flanders DC – Antwerp Management School Knowledge Center.

Creative Industries represent 2,4% of total employees in Flanders *

Share of Creative Industries in Total amount of employees, 2013



* Flemish Region + 50% Brussels Capital Region Source: Department of Work and Social Economy; Flanders DC – Antwerp Management School Knowledge Center

In comparison to reference year 2010, the following global trends can be identified:

- The number of self-employed, revenue, and net added value increased by 3%, 4% and 3% respectively.
- The employers and employees decreased by 7% and 5% respectively.

Impact measurement	2015	2013*	2011*
Reference year	2013	2010	2008
Self-employed (#)	53.477	51.988	51.920
Employers (#)	8.169	8.711	8.174
Employees (FTE)	69.983	73.455	69.931
Turnover (€)	23.562.680.031	22.675.208.739	23.906.051.769
Added value (€)	7.174.077.561	6.983.023.713	7.010.703.743

Comparison impact measurements reference years 2013 and 2010
* In function of renewed insights into the data, some datasources from previous impactmeasurements have been reevaluated.

Impact measurement	Absolute increase		Relative increase	
Reference year	2013-2010	2010-2008	2013-2010	2010-2008
Self-employed (#)	1.489	68	2,78%	0,13%
Employers (#)	-542	537	-6,63%	6,16%
Employees (FTE)	-3.472	3.524	-4,96%	4,80%
Turnover (€)	887.471.292	-1.230.843.030	3,77%	-5,43%
Added value (€)	191.053.848	-27.680.030	2,66%	-0,40%

Comparison impact measurements reference years 2013 and 2010

The evolution in the creative industries could possibly indicate a conglomeration in the creative landscape: more proceeds are distributed among less employers. This statement, however, must be treated with some caution, because not every sector and cluster of sectors display the same tendencies.

The cluster **arts and heritage**, which includes the visual arts, performing arts, music and cultural heritage, sees a mixed result. An important trend that we determined throughout these sub-sectors is the increase of self-employed (most notably in the music and visual arts sectors). However, on the level of employers and employees, this cluster shows decreases, fueled by decreasing numbers in the music and performing arts. Finally this cluster shows a decrease in net added value, mostly due to diminishing financial results in the music industry.

Also within the cluster, **media and entertainment** (audiovisual industry, gaming, print media and new media) a downward trend is detected in terms of employers and employees. However, increases are to be found in self-employed, and in the financial figures, all increasing by about 2%.

In the cluster **creative business services**, which includes architecture, design, fashion and advertising & communication, a similar picture emerges: increases in self-employed and the financial figures and decreases in employers and employees. Large increases are most notably in the design sector (except for the number of self-employed) and in the sector of architecture (mostly in the financial numbers). However, the advertising & communication sector shows descreases in employers, employees and revenue (however, coupled with increases in self-employed and net added value).

Comment [VAW3]: klopt deze conclusie??