

[Andy C. Pratt](#)

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**The cultural industries production system:
a case study of employment change
in Britain, 1984-91**

Andy C Pratt
Department of Geography
London School of Economics and Political Science
Houghton Street
London WC2A 2AE Tel: 0171 955 7588 (DD) email: a.c.pratt@lse.ac.uk

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Abstract

The cultural industries sector employed 4.5% of all employees in Britain in 1991: equal in size to the construction industry, or to the combined employment in the Agricultural, and the Extractive Industries. However, this sector has remained relatively under analyzed in both the geographical and planning literature. The paper begins by defining the Cultural Industries Production System (CIPS). The second part operationalizes this definition with respect to secondary sources on employment in the CIPS in Britain. The third part considers the change in the employment structure of the CIPS between 1984 and 1991, and finally, the paper addresses the regional patterns of employment in the CIPS with particular emphasis upon London and the South East.

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Introduction

Despite the diverse labours of a small group of cultural economists, sociologists of art, and scholars of communications studies the accepted wisdom remains that cultural industrial production is both ephemeral to developed economies, and/or dependent upon more productive parts of those same economies. As a result these industries have seldom been considered deserving of serious or rigorous academic analysis. Where analyses have been carried out they have commonly focused on individual industries, or parts thereof, rather than the broader cultural industries production system. Historically, there may have been some justification in such a stance. However, such a position is now difficult to sustain given the recent growth of the cultural industries in terms of their volume, value and range of output. In addition to this absolute growth, in many developed economies the relative importance of the cultural industries has grown as deindustrialization has occurred.

It is the argument of this paper that the cultural industries merit significant analysis, and, that careful conceptualisation is important if their development and dynamics are to be fully understood. The first part of the paper begins by tackling the thorny problem of definition. Drawing upon a range of debates from within cultural studies and economic geography a definition of the Cultural Industries Production System (CIPS) is elaborated. The second part operationalizes this definition with respect to secondary sources on employment in the CIPS in Britain. The third part discusses the change in the employment structure of the CIPS between 1984 and 1991. An important characteristic of the cultural industries is that fact that they have a marked spatial distribution. This is manifest in their concentration in particular nation states globally, and within particular regions of these states. Accordingly, the final section of the paper addresses the regional patterns of employment in the British CIPS.

The purpose of this paper is to create a demonstration effect; to highlight the limitations of existing analyses, and to indicate how better analyses might be constructed. It is unashamedly pragmatic in recognizing that the case for further intensive, qualitative, analysis can only be made upon the basis of detailed empirical evidence - even if the initial conclusion of such an exercise is that the original data sources are weak and inadequate for the purpose. What such analysis can reveal, beyond an illumination of a first cut analysis, are the particular dimensions of the weaknesses of the current data sources.

The analysis detailed here is based upon the notion that the diverse activities of the cultural industries can be, and should be, considered collectively as a coherent production system. An attempt has been made to work with already existing secondary data for which it is possible to construct a time series of consistent data. Such data, though flawed, will provide a basis for cross-national comparisons. In this sense the classifications actually adopted here are crude and less than ideal. In the light of the history and exaggerated claims surrounding the cultural industries this paper proceeds with caution, preferring to err on the side of undercounting by excluding marginal activities.

Part 1: Definitions

Empirically, the definitional problems for the cultural industries can be divided along two dimensions: breadth and depth. Questions of breadth concern the delimitation of what is culture. Once we have set these limits, then it is possible to discuss the production of culture: this is, logically, the domain of the cultural industries. Both dimensions of this problem are underpinned by substantial conceptual debates.

From ideal to material culture.

There is a voluminous literature on culture and its definition. The purpose of this section is to simply highlight some of the conceptual frameworks that have shaped this debate rather than engage in an exhaustive survey. Reviews of the topic usually draw upon Matthew Arnold's

(1960) writings of the mid-nineteenth century as an exemplar of idealist notions of culture. Culture is associated with notions of civilisation, education and improvement: generally with the Enlightenment. Later work in the field of literary criticism, notably by Leavis (1930) and Eliot (1947), attempted to more rigorously separate good from bad culture; they were concerned with what they perceived to be a deterioration in cultural standards. The effect of such work was to reinforce the demarcation of high culture; legitimating particular forms of expression and canons of work in the areas of classical music, fine art, and certain types of literature.

Interestingly, this definition was to be challenged by changes in the material world. Notably, the development of new means of mechanical reproduction of artefacts which meant that existing art forms could be mass produced, and, that new art forms could be created. It was in response to these trends that Adorno and Horkheimer (1977), writing in 1947, criticised the new cultural forms produced by, what they termed, the 'cultural industries'. The main focus of their concern was that mass produced art forms were different to other forms, the key distinction related to the 'aura' of the original craft-produced art form'. Adorno and Horkheimer's analysis, although it mentions the cultural industries, was like much of the subsequent work on culture, primarily concerned with the effect of particular forms on 'mass society'. The list of new cultural forms that were denounced included film, television, radio and printing (of fine art).

Further technological advance, as well as the growth of disposable income, especially amongst the youth, created huge growth in the scale and scope of the cultural industries and their associated products. In turn forms such as advertising, and photography, pop music, and fashion clothing grew in importance. Academic responses to this change took the form of

¹ Adorno makes a further distinction between those cultural industries which employ industrial technology to produce or reproduce cultural goods which are themselves produced largely by craft means (eg books, records), and those where the cultural form is itself industrial (newspapers, television, film). Cited in Garnham (1990: 158).

attempts to develop an analysis of the popular culture that was being produced: a key pole of this debate was the Centre for Contemporary Cultural Studies (CCCS) launched by Richard Hoggart in 1964 (see Storey 1993). More generally, the conceptual shift figured by the development of CCCS was to emphasize a 'social' view of culture, sometimes termed 'culturalism', where culture is defined not in relation to an ideal, but rather in a three fold manner: as a way of life, as an expression of a particular way of life, and as a method for reconstituting a particular way of life (see Williams 1965: 57). Of course, this did not erase debates about cultural stratification, although two lines of response were developed, first for cultural relativism- seeking to undermine idealist cultural elitism, second, to legitimate and authenticate mass or popular culture and as a consequence open it out for serious analysis. In practice, these debates have stretched the boundaries of culture that have been subjected to serious analysis from film to cartoons, comics, and sport.

The debate about culture ranges then, from a restrictive idealist view, to a broader material one; with this shift has come an analytic shift from the reception of fixed ideas of culture to that of the making of culture. Perhaps the clearest elaboration of this position can be seen in the work of Bourdieu (1993) on cultural reproduction. Practically, this has led Bourdieu to carry out analyses of the education system, of art institutions, etc., to discern how taste is formed and reformed. This is a useful link to the second strand of the argument noted above: the 'depth' of cultural industries, or, how the cultural industries are constituted.

Cultural production: industry or sector ?

Bourdieu's (1993, 1979) work usefully highlights the broader settings of cultural production in terms of the social shaping of opinion and taste: what he refers to as the 'field of cultural production'. Bourdieu's point, in its simplest sense, is that cultural production always takes place within specific contexts or 'fields'. In a rather narrower, but parallel, sense a body of

² The main focus of analysis in the fields of Communications Studies and Cultural Studies has been the effects of particular cultural forms on society rather than the material production of those forms.

research on the sociology of culture - notably that of Becker (1976, 1974) - has stressed the social context of artistic production. Becker, for example, counters the idea of the isolated artist by drawing attention to the context and organization of artistic production: art schools, performance or display spaces, criticism and audience education. In short, what might best be termed the social infrastructure within which an art work takes shape, takes on meaning, and allows that meaning to circulate through society. Importantly, for Bourdieu, the field of cultural production intersects with other fields; namely those of political and economic power. Thus, cultural products are not only shaped by their production but also their reception or consumption.

This notion of context has a resonance with recent debates in the field of economic geography that have stressed the importance of networks and institutions. Against this traditional taxonomy can be placed others that have arisen from debates around the institutionally embedded nature of economic activity. Broadly, such analyses have stressed the social organization of relationships both with and across firms. In turn they also stress how the market is constituted (see Hodgson 1988). The salient point here is that such analyses suggest that the unit of analysis may not be the firm, but rather the network or institution (see also Granovetter 1985; Swedberg 1994; Powell 1990; Grabher 1993). Illustration of such classifications and their explanatory scope can be made by reference to the work on industrial districts. Analysts of industrial districts characterize them by the existence of social divisions of labour across firms. This division of labour is not only of part finished goods, but finished goods too. The success of the industrial district is the production ensemble, the combination of different industries that provides the 'scope' to mix, match, and if necessary, create new products (see Pyke et al. 1990; Best 1990). Second, the industrial district is situated within a dense web of social and institutional structures (see Powell and DiMaggio 1992; Amin and Thrift 1995).

Parallel debates have been recently developed in the field of innovation studies, notably from neo-Schumpeterian authors, who have highlighted the significance of both intra-firm and

inter-firm networks and institutions of innovation (see Johnson 1992, and Freeman 1992). Lundvall (1992) argues that these innovation systems are constituted nationally through the particularity of education, training, and financial regulations. The net result of these innovation systems (if successful) is the creation of greater interactivity and learning which is valorised for the system as a whole: to the collective benefit of all actors within it.

There are four points which can be drawn out from the above discussion. First, that the individual firm, like critiques of the individual artist with respect to analyses of artistic production made by writers such as Bourdieu and Becker, is not an appropriate unit of analysis. Second, that industries, or the production systems that they are linked to, are hybrid - neither characterised by the same product, nor focusing solely on production or consumption. Third, that they will all be positioned within a social context, this is likely to vary nationally, and if the regional institutional regulation allows it, regionally. Fourth, that changing social and economic contexts will give rise to a changing production system, whereby new production techniques or activities may be included or excluded.

Some authors have used the term 'sector' to refer to such groupings of industrial activities. The term is often used interchangeably with the French term 'filier' to express the thread linking a chain of production (see Best 1990: 17; Storper and Walker 1989: 126 et seq.; Murray 1991: 45; Geddes 1992). The aim is to include all of the activities that are required to produce say, furniture, or textiles. This notion has emerged as popular in industrial policy proposals, within the UK many urban authorities developed policies based upon sectors in the

³ It is important to contrast this conceptualization with Neo-classical economic explanations which rest upon prior assumptions as to basic units of analysis: namely the firm (for a classic statement, see Coase 1937). The term sector is often used in Neo-classical economic analyses as a collective term in such analyses to refer to all firms, or industries, competing in the production of the same product. That is, they are all competing in the same sub-market. Not surprisingly, statistical classifications of industries are also based upon these assumptions too.

1980's; being much influenced by the policies initially developed by the Greater London Council (see Haughton and Thomas 1992). Sectoral policies can also be seen as a characteristic of the French industrial policy system too (see Hall 1986). Despite their popularity from a policy point of view, the number of practical economic analyses of sectors is small (see Geddes and Bennington 1992; and Hirst and Zeitlin 1989).

The term sector is rejected for the purposes of this paper due to its loose usage, lack of theoretical justification, and its economic overtones, as well as the problem with confusion with traditional notions of 'sector'. This confusion is well illustrated by the work of Garnham (1987; 1990); one of the few attempts to develop an integrated understanding of the cultural industries. Garnham (1987) defines the cultural industries as the 'social practices whose primary concern is to transmit meaning'. This definition falls foul of the 'depth' problem: that is, how to delimit which social practices should be included. For example, is the production of an electronic assembly consistent with this? Probably not. However, such an assembly is certainly part of the cultural industries production system. In other words, cultural products would not be able to be made, to circulate, to be sold, or used without these items or processes. Elsewhere Garnham (1990: 159) argues for analysis of the cultural sector as a whole on the basis of those industries and companies that are in competition for a common pool of consumer income, advertising revenue, consumption time and skilled labour. Despite Garnham's commitment to a political economy approach, such a definition clearly draws upon a neo-classical concept of the industrial sector.

The cultural industries production system

In an attempt to avoid such confusion and to clearly signal the principle of classification this paper favours instead the concept of the Production System. This concept finds a resonance with Lundvall's innovation system, Bourdieu's cultural field, and the concept of institutional embeddedness. Thus, the definition is underpinned by the actual form of interaction within and between companies engaged in cultural production, in part it will be defined by product, and by common systems of regulation, as well as common techniques and technologies.

Within this definition it is clear that there is a strong mutually reinforcing relationship between activities such as publishing, film, music and television. For example, there are clear inter-dependencies of technologies, labour markets, and content between these activities. There are other industries whose position is less clear.

It could be argued that tourism related activities (hotel accommodation, and eating places) also share this inter-connectivity⁴, the same could also be said of sport. Sport is an interesting case in point. Whilst it could be claimed that Sport has a separate and unique production system (linked to the infrastructure, training, labour markets, merchandising, and performance), recent events associated with satellite television sponsorship deals are drawing individual sports (especially football) more closely into the ambit of television. This, in turn, is having an impact on the structure and timing of sporting competitions. Thus, whilst the case is not so strong at the present, in the future a case could be made for including sport within the core cultural industries.

Other industries which are future candidates for inclusion in the cultural industries are the computer and telecommunications industries. This claim is made on the basis of the rapid move towards technological and organizational convergence within these industries and between them and the cultural industries (see Feldman 1997). A final problem case is the garment industry. Clearly, a case for inclusion of aspects of this - high fashion - could be made. There are two difficulties. First, separating out high from everyday fashion: this seems to potentially re-open the high-low culture divide. The second point is perhaps analytically more salient, does the garment industry (or part of it) constitute a separate production system, or, is it sufficiently interwoven with the music and film industries? The decision taken within

⁴ At the margins a case could be made for including some restaurants; they seem to play a significant role in facilitating meeting and deal making in many media industries.

this paper is to exclude this industry⁵; however, it is clearly a topic for further research (see McRobbie 1994; Mort 1996; Scott 1996; and Crewe and Forster 1995).

A substantial body of research has already been carried out within the range of individual industries implied by a cultural industries production system. It is not the place to detail a literature review of this work. An indication can be gained through consultation of the journals Cultural Studies, Media Culture and Society, The Journal of Cultural Economics, and, The European Journal of Cultural Policy. Four foci of analysis can be identified. First, there is a body of work that stresses the effects of different organizational structures and different types of markets on the diversity and range of cultural products, examples of fine art, theatre and book publishing (see Crane 1992; Powell 1982; and, DiMaggio 1987). Second, there is research on the ownership and control of the media via analyses of particular industries such as film, television, advertising, music, and publishing (see, for example: Murdock 1982; Garnham 1987, 1990; Mattelart 1991; Frith 1983, 1990; Frith and Goodwin 1990; Curtain 1993; Lorimer 1993). Recently, the changing technologies of production, and the reorganization and deregulation of media industries in particular has provided another focus for research (see Robins 1992; Baldwin et al 1996 ; Collins 1993, 1996) . Finally, there are studies of the economics of culture that apply the traditional tools of economic analysis to the study of cultural activities. A key issue that has emerged in this field concerns the issue of public subsidy, how and why it may be justified (see Blaug 1976; Baumol and Bowen 1966; Peacock and Rizzo 1994). This relates closely to a fourth set of debates about cultural policy and economic development, especially at the local level (see Bianchini and Parkinson 1993).

All four areas have fed into a growing interest from planners, economic sociologists and geographers, particularly within the context of debates about flexible specialisation (see Scott 1996, 1997; Cornford and Robins 1992; Aksoy and Robins 1992; Storper and Christopherson 1987; Christopherson and Storper 1986; Driver and Gillespie 1993a, 1993b; and, Lash and

⁵ Pragmatically, the standard industrial classification is too crude to make sufficient differentiations.

Urry 1994; Crewe and Forster 1995; Zukin 1989, 1995). Illuminating though this work is in its own terms, it has predominantly been carried out in a fragmented manner spread across a range of academic sub-disciplines and executed from within a variety of theoretical and methodological frameworks. The net result is that the overall shape, scope and interdependence of the CIPS has been neglected. It might be argued that the gathering pace of technological convergence underpinning restructuring and reorganization of the industries creates a greater need than ever for an integrated analysis. By way of an attempt to realize a more coherent research agenda this paper seek to operationalize a definition of the CIPS.

Part 2: Operationalizing the CIPS for employment

Broadly, the working definition of the CIPS begins with its products: performance, fine art and literature; their reproduction, books, journal magazines, newspapers, film, radio, television, recordings on disc or tape; and activities that link together art forms such as advertising. Also considered are the production, distribution and display processes of printing, and broadcasting, as well as museums, libraries, theatres, nightclubs and galleries.

Even the simplest of definitions of the cultural industries can cause difficulties with respect to measurement. The analysis which forms the main section of this paper is severely constrained by the availability of data. The main source used is the Census of Employment⁶. Due to the limited availability and changing classifications of the latter a time period 1984-91 was selected for the purposes of this paper⁷.

⁶ It is a point well taken that all of the employees who are captured in an industry by industry analysis will not all be 'artists' (in the way that, say, an occupational survey might identify these see Towse 1996; O'Brien and Feist 1995). However, non-artistic skills and occupations play a vital role in the sustenance and support of cultural industries. The phenomenon of overlap and difference of those employed in cultural occupations and cultural industries, or those in cultural occupations and not cultural industries, or those in cultural industries but not cultural occupations has been discussed by O'Brien and Feist (1995:9).

There are two sets of problems associated with the analyses detailed below. First, cultural industries include a significant proportion of the service sector - a notoriously difficult sector to analyze due to limited and idiosyncratic data collection (see Marshall and Wood 1986). Second, that cultural industries, when collectively defined as a production system, span the manufacturing: service industry divide and as such are subject to inadequate description. For example, there is a category for the production of gramophone records and prerecorded tapes but it is difficult to see how an entertainment conglomerate such as ThornEMI might be classified.

The following represents an attempt to produce a first approximation of a comprehensive analysis of the CIPS⁸. This analysis creates a context within which to consider the diverse work on individual cultural industries noted earlier in this paper. Although there is no readily available, systematic, analysis or data base for the measurement of the location and extent of employment in the cultural industries several notable attempts have been made to construct such an analysis. The major differences concern definition. The seminal report by Scanlon and Longley (1984) for the New York Port Authority in part stimulated a UK report by Myerscough (1988). Myerscough's survey for the Policy Studies Institute gathered together, for the first time, all available sources on the economic value of what were termed 'the arts'; this analysis included measures of employment. Myerscough's work has been replicated and extended both in the PSI's Cultural Trends, and occasional reports (Casey et al 1996). The definitions used in these analyses were very narrow focusing upon the artist and not the wider sector.

⁷ A new Standard industrial classification has been introduced and applied to census collection from 1991 onwards. However, although there are a few small differences the overall precision of cultural industry classification has not been improved to any significant extent.

⁸ For an additional analysis of the UK Balance of Trade figures for the CIPS, see Pratt (1997).

The most rigorous and wide ranging analysis, one that is close to the scope of this paper, has been carried out by O'Brien and Feist (1995) for the Arts Council of England using the Census of Population. This analysis is of particular note for two reasons. First, that analyses were developed of both the occupational and industrial classifications of the census. Second, that a broader definition of cultural industries was employed to include printing and publishing activities as well as 'artists'. The detailed classifications of employment used the reports noted above is compared in Tables 1 and 2.

(tables 1 and 2 here):

There is no space here to discuss the general problems associated with the reliability and use of both the CE and CP for analyses of employment, however this can be followed up elsewhere⁹ (see Townsend 1991). The CE was chosen for this initial analysis due to the ease of availability, its use in local planning practice, the workplace basis, and the regularity of collection and publication. The period 1984-91 was chosen as the census period readily available on-line via NOMIS (ONS) with the same classification scheme.

As will be evident from the introductory discussion, data collected under the auspices of the CE collated on the basis the Standard Industrial Classification (SIC), in which there are no simple cultural industry sub-divisions. The difficulties of the utilisation of the SIC and its international equivalents are well rehearsed by economic geographers; most recently by those particularly concerned with analysis of the service sector (see Marshall and Wood 1995; Miles 1993; Walker 1985; Daniels 1985; Daniels and Moulaert 1991). In addition to its neo-

⁹ A recent report by the Arts Council compared results with the CP and CE for 1991; results were of a similar order except in the category (SIC 9760) 'Artists, music composers and own account artists' where they reported CE 10,900 persons, and the CP 85,400 in GB (O'Brien and Feist 1995: 117). The reason for such a disparity is the sampling procedure adopted by the CE which involves a sample of firms employing under 5 persons, and does not count the self employed at all. Many 'artists' fall into this category.

classical conceptual legacy, the SIC also bears the mark of its history (or rather the economic history of developed countries) such that manufacturing is meticulously subdivided, and services poorly subdivided. Even the subdivisions in evidence relate to past industry types and structures. The problem is aggravated by the periodic revision of the SIC; the latest revision took place in 1990.

The key idea behind the taxonomy used here is to reflect the interlinked nature of the cultural industries comprising the CIPS. The strategy adopted in this paper is to capture within the classification as many of the activities that are necessary for the social production of a cultural event or artefact. The classification used in this paper is a compromise, but one that will allow replication and comparison - potentially in an international context¹⁰. Hence, data was collated from the greatest disaggregation of the census, the 4 - digit SIC. The relevant industrial orders were then regrouped to correspond to the CIPS. For analytic purposes this sector was subdivided into four sub-groups corresponding to Production, Infrastructure, Distribution and Consumption activities (see Table 3). For illustrative purposes a further two industrial groups have been included which together with the four core cultural industry sub-groups exhaust the range of cultural industries (see Table 4). However, the analysis presented below is only concerned with the CIPS.

(Tables 3 & 4)

Part 3: The structure of cultural industries sector employment

In total 4.5% of all employees in Britain in 1991 were employed in the CIPS¹¹. Whilst it cannot compete with the Banking, insurance and finance industries for size and growth,

¹⁰ The SIC is compatible with an international standard of industrial classification (ISIC). It is possible to translate the classification developed here into one compatible with other country's classification systems.

¹¹ If one includes sport and tourism this figure rises to 11.3%, see Appendix 1.

nevertheless, the CIPS is a significant one equal in size to the Construction industry, or to the combined employment in the Agricultural, and the Extractive Industries. Within the 972,000¹² employees in the CIPS the largest proportion, over one third, are found in Group III (distribution), only one-sixth are Group I (creative artists) the traditional definition of ‘the arts’ (Table 5). Even after taking account of the under-representation that the CE provides for creative artists (see above) the sub-sectoral breakdown does emphasize that the artist is just the visible ‘tip of the iceberg’ of employment in the CIPS.

Overall, the gender split of the CIPS is 53:47 in favour of males, however this overall figure hides both a substantial and structured imbalance. Whilst the composition of the CIPS is mainly full-time (75%); predictably, fulltime jobs are mainly filled by men (63%) and part-time jobs by women (74%) (See Table 6). Given the structured inequality of gender representation in all industries in Britain it is not surprising to find that sub-sectors of the cultural industries reflect the general pattern. Thus, women are least well represented in Group II, that dominated by traditional manufacturing activities (as such they are not dramatically different to the gender balance in these industries), and best represented in Group IV (consumption/retailing); the group within which part-time employment dominates. Closer analysis of the occupational and industry level data would be required to explore the similarities and contrasts between cultural industries and other industries; this is clearly an important avenue for future research.

Restructuring within the CIPS: 1984-91

In terms of changes over the 1984-91 period for which comparable data is readily available the CIPS experienced a decline of 1.7% (against a background of +3.4% in Britain as a whole). However, it is important to note that growth in British employment in this period is almost exclusively accounted for by growth in three industry groups: Wholesale and retail distribution; Transport and communications; and, Banking, insurance and finance. In such a

¹² All data are rounded to nearest 500 to maintain confidentiality.

context, the performance of the CIPS is good. Looking more closely at the changes within the CIPS considerable variation is evident: Groups I and IV grew (+3.7% and +15.6% respectively), and II and III declined (-19.4% and -3.5% respectively).

At face value the contradictory trends suggest a confusing picture; it might be argued that it weakens the case for an interrelated CIPS. Moreover, the overall decline in national employment does not suggest vibrancy. However, as will be shown below, aspects of technological change and organisational restructuring account for much of this unevenness. Some of the key events in the period under investigation provide the backdrop to considerable organizational and technological change: contracting out of a programme making with the creation of Channel 4¹³, as well as the allocation of new franchises for national and local radio. Developments with respect to the communication, capture and manipulation of digital information, have affected, and will continue to affect, both the new electronic media and traditional 'print': for example, desktop, or electronic, publishing of newspapers and books. Within the time period covered in this analysis the impact was primarily felt in the newspaper and magazine industries (see Cockburn 1983, for the background to changes in the UK newspaper industry; and Driver and Gillespie 1993a, 1993b, for the technological dimension of restructuring in the Printing and publishing of periodicals). It will be interesting to see what the impact on employment of the emergence of cable and satellite¹⁴, as well as digital broadcasting and the internet will be in the 1990s.

¹³ Channel 4 was first broadcast in 1982. The Channel 4 model was television station as publisher rather than programme maker; the result was the emergence of a large number of small independent production companies. This model has been extended to ITV and the BBC. Over the period 1987-1993 a shift took place such that 25% of all programmes were the result of independent production. Again, this has reinforced the trend to establish small production companies. Detailed analysis will be required to establish whether there has been a net gain or loss of employment as a result of such changes.

¹⁴ The impact of satellite broadcasting lies outside the time period of this paper. The first broadcasts of Sky and BSB (merged in the same year as BSkyB) took place in 1990.

(Tables 5,6 and7 here)

Detailed scrutiny of the performance of individual industries yields some significant results (see Table 7). In Group I declines in Film (-3.7%) and Authors (-3.8%) are offset by growth in Advertising (+8.2%), and Radio and television (+4.7%). The decline in British film making has been a long-running story, although this period contains a mini-renaissance (in part due to Channel 4 co-productions); much of it concentrated in London (see below). The decline in the numbers of Authors should not be treated as reliable; CP data for 1981-91 suggests a 63% increase in employment in this category (O'Brien and Feist 1995: 108). Growth in Advertising is consistent with the boom in the Advertising industry's fortunes in the 1980's. Broadcasting received a boost both from the continuing regionalisation of radio and television production facilities of the BBC and the independent sector.

In Group II (infrastructure) the decline overall is much in line with the broader manufacturing decline which dominates this group; except that there are massive collapse of employment in three industries: Radio and electronic capital goods (-32%), Active components (-48%) and Musical instruments (-29%). The latter is a very small industry (1991, approximately 2,000 persons) that is very sensitive to consumer confidence. However, the growth in the use of electrical musical instruments, especially synthesizers, and their penetration into the household as well as the professional market has been dominated by products manufactured in Japan (eg Yamaha, Roland). Employment in the Radio and electronic capital goods industry, which includes (sound and vision) recording studio based electronic equipment¹⁵, has also been declining. Active components, including the subassemblies (components) of domestic hi-fi equipment, has also declined. The contradictory growth in employment in

¹⁵ Given the increasing emphasis upon the mixing and editing of music, video and film new computer controlled editing and mixing equipment can be seen as an important creative resource for the audio-visual industries. In some cases, it may provide crucial market advantage through the creation of new sounds, images or special effects.

Electrical consumer goods (+17%) is consistent with the shift towards ‘screwdriver plant’ production of hi-fis and televisions¹⁶. This is supported by the literature on the decline of the productive capacity of UK (and European) manufacturing industry, especially that producing consumer electronics (see Hobday 1992).

Although more research is needed to test these hypotheses, they are suggestive of an erosion of innovative capacity in many areas of cultural industry infrastructure. In industries so keenly geared to innovation and novelty this is likely to prove to be a damaging flaw; moreover, it may well have a knock on effect due to the nature of the innovation process in the cultural industries that relies upon the exchange and interpenetration of technologies and techniques across the production system.

The wholesale distribution and reproduction of cultural goods (Group III) has seen an overall fall of -3.5% in employment; mainly due to the losses in Gramophone (-22%) and Printing and publishing of newspapers (-28%). The large decline in Gramophone production took place in a small industry (1991, approximately 5,000 employees). The decline may well be related to the demise of vinyl as a medium and its replacement by Compact Discs (CD)¹⁷. CDs require specialized production facilities. The early pressing plants were built in Germany and as demand grew, vinyl pressing plants in the UK contracted. It may be the lag in building up CD pressing capacity that is picked up in the employment figures¹⁸. The story of employment decline in the Printing and publishing of newspapers is less ambiguous (-29,500). The decline is the result of the shift to direct entry of copy by journalists and the reorganisation of the newspaper industry after the Wapping industrial dispute of 1983. This dispute was triggered

¹⁶ The production of television sets has become increasingly dominated by Japanese owned companies who manufacture in Britain for a European market.

¹⁷ The audio CD was introduced in 1983. Substantial consumer sales built up in the 1985-90 period.

¹⁸ The music industry is particularly poorly served by the SIC. See Desmondhalgh (1996), and Sadler (1997) for comments on the contemporary restructuring of this industry.

by News International's decision to unilaterally force new work practices upon the workforce. Alongside the total decline we can note the dispersed printing in regions that has led to reduced transportation and dispersal from London. The dramatic contraction of newspapers is countered by a huge growth (+51%) in Printing and publishing of books. The modest change in the Printing and publishing of periodicals confirms the analysis of Driver and Gillespie (1993a, 1993b) of the impact of technological change on that industry which was quite different from the Printing and publishing of newspapers. It is difficult to account for the huge growth in the Printing and publishing of books. The fact that the period in question was one of considerable takeover and merger activity, notably of smaller firms, suggests that the growth is more a statistical anomaly rather than actual¹⁹.

The employment data reported in Group IV (sites of exchange of cultural value) is an under-representation of this sub-group as a whole - data collected refers only to book retailing - it is possible to see the consequences of the changing nature of the cultural industries and the ever closer ties with material consumption; the category picked up by the SIC is retail distribution of books and stationery, and it registers a growth of +56%, we can perhaps note the emergence of large specialist booksellers of the 1980's such as Dillons (eventually purchased by Thorn-EMI who also own HMV music stores) and Waterstones (since sold to W H Smith) which, in the end, failed to challenge the oligopoly of WH Smith (who also own the Our Price and the Virgin Megastore chain of record shops) and Menzies. Although they do not appear to sit happily within this sub-sector, Libraries and Museums have also achieved a modest increase (+ 18%). Although the employment data is not disaggregated further we can point to the resurgence in museum building in Britain; both the creation of new facilities but also refurbishment. Refurbishment has usually included cafes, restaurants and bookshops (as

¹⁹ The CE does not count firms under 5 persons; the main object of the takeover activity. Smaller companies would have been invisible to the CE, however, the effect of the merged firm would have increase employment in the new holding company.

with theatres)²⁰. Clearly, the pressures on funding and requirements to generate revenue has played a part in this change. Libraries have been less able to exploit their position for revenue generating activities, as a result they have suffered from an overall reduction of funding and services.

Overall we can begin to see a complex pattern emerging from this sectoral survey, one that begins to point up the significance of organisational and regulatory change interwoven with rapid technological innovation across a variety of industries. Such changes have given rise to some dramatic employment outcomes: perhaps the most striking being that of the newspaper industry. Thus far, we have tried to offer an indicative account of changes within sub-groups; clearly more detailed analysis of employment linked to changes in the organization of production is required at the level of individual industries. The turbulence outlined above conceals the more localised impacts of organisational, technological and structural changes. The impact is especially marked in the cultural industries as, historically, they have been particularly concentrated in and around a small group of major cities. Hence, sectoral decline is resulting in more dramatic spatial effects. It is to these issues that we turn in the remainder of this paper.

Part 4: Urban and regional patterns of employment in the CIPS

The regional distribution of employment in the CIPS in Britain demonstrates the clear dominance of London and the Rest of the South East (RoSE)²¹. Table 8 (columns 4 and 5) indicates that respectively, they accounted for 24% and 21% of Britain's CIPS employment in 1991. Comparing columns 3 and 5 of Table 8 highlights that this distribution has changed only slightly since 1984; the notable changes were a decline in the RoSE and London, and

²⁰ A well publicised example is the Victoria and Albert Museum, London and its advertising campaign which boasted 'an ace cafe with a museum attached'.

²¹ RoSE is the South East Region excluding London.

growth elsewhere: a group of regions have experienced more than 10% growth in their employment (East Midlands, Wales, Yorkshire and Humberside, East Anglia and the South West). The net effect of these changes has been a dispersive redistribution of employment across the regions. When contrasted with overall pattern of regional employment change in Britain (+3.5% overall) the negative trend for the CIPS of -1.7% can be seen to be quite peculiar (see Table 8, column 7). Although the greatest decline is replicated in London, albeit in an exaggerated fashion, there is considerably more flux in the performance of the CIPS as measured by employment. However, aside from London, the greatest rates of change result from calculation on a small initial base. Comparison of Table 8, columns 2 and 4, indicates that the overall regional distribution has remained stable between 1984-91, despite the small net contraction in London and the RoSE.

(tables 8,9, 10 here)

When considered from the perspective of a different spatial unit, that of the major conurbation rather than the standard planning region, it can be noted that just 40% of all employment in cultural industries is accounted for by the eight major conurbations²² (Table 9; column 4). In 1991 59% of all urban, and 24% of all British CIPS employment was to be found in London. This suggests that whilst employment in CIPS is not primarily urban in character, London did account for the single dominant concentration. Data presented in Table 9 suggests that CIPS became less urban in character over the period studied. However, the dispersal from the major urban areas has not occurred evenly across the CIPS. A decline in Groups II and III, with slight compensation in Groups I and IV can be noted across all of the urban areas. London in particular is dominated by the decline of Sector II, although it is slightly compensated for by growth in Groups I and III.

²² Technically, the conurbations are termed the Metropolitan regions: Greater London, West Midlands, South Yorkshire, Greater Manchester, Merseyside, Tyne and Wear, Lothian, and Strathclyde.

Whilst this distributional data does make the point that London does have a unique and substantial concentration of CIPS employment, it might be argued that such figures simply reflect the fact that one-third of all British employment is concentrated in London and the RoSE; it does not tell us specifically about the concentration of CIPS. Table 10 helps here, columns 1 and 2 show the proportion of the regional employment total accounted for by CIPS; columns 3 and 4 offer a standardized measure of concentration: the Location Quotient²³. A North-South divide in the relative concentrations of cultural employment can be seen at the regional level. The Northern regions predominantly fall below the British average for proportions of cultural industries by region. Location Quotients (LQ) calculated for all regions demonstrate that the picture is more one of London and RoSE dominance, only these two regions have LQ of more than 1, two (East Anglian and the South West) at parity, and all other regions having a LQ of less than 1, indicating lack of specialisation. Considering the 1984-91 period, it does seem as though the dispersal effect noted above has given rise to an increased degree of concentration in all regions aside from the RoSE (given the overall trend this can be more accurately described as a decreased degree of dispersal).

The core regions: London and the RoSE

The dynamics of change in the cultural industries can only be fully appreciated by exploring the sectoral and regional changes in more detail. As an illustration the remainder of this paper focuses upon change in the dominant regions: London and the RoSE. The first point to note about Table 11 is that the small decline of employment at the national level is much exaggerated in the RoSE (-7.1%), and even more dramatically pointed up in London itself (-13.9%). The broad pattern of change by sub-groups is significant: in Group I the small growth in the GB is countered by a large decline in the RoSE, but growth in London: this

²³ The Location Quotient is a measure of concentration. A score of 1.0 indicates that the region has the expected proportion of the industry given the overall employment, and employment in that industry. A score of less than 1.0 indicates an under-representation, a score of more than one overrepresentation.

would seem to suggest a concentration effect. Patterns in Groups II and III are broadly similar in the GB and the RoSE, but starkly exaggerated in London suggesting not only an overall decline, but also that a previous pattern of concentration has been attenuated. The RoSE shows significant growth in consumption sub-group (IV), double the rate of either London or Britain. The trend to deconcentration in the RoSE is reinforced by LQ analysis (see Table 10). This shows that 16 of the 21 industry headings were above expected concentration; by 1991 all but one industry level LQ figure had fallen (the exception being 3443: Radio and electrical equipment), with only 12 of the 21 being above the expected concentration.

(tables 11 and 12 about here)

This pattern of dispersal of the 'creative' industries and the concentration of consumption industries in the RoSE can be contrasted with the situation in London. In 1984 only one cultural industry fell below a LQ of 1.0 in London (surprisingly, Night clubs), some industries registered LQs of 4.0 or 5.0 which often represented a substantial proportion of total national employment in these industries. Those industries which are concentrated in London and have 45%, or more, of national employment in that industry) are: Advertising, Film, Radio and television, Authors/Composers²⁴, Gramophone records, and Printing and publishing of periodicals.

By 1991 although there was still considerable concentration in London, most LQs had fallen; most significant was the fact that 6 industries - most of Group II - fell below a LQ of 1.0: Radio and electrical capital goods, Active components and electronic subassemblies, Electronic consumer goods, Photographic and cinematographic equipment, Musical instruments, and Nightclubs. The implication of this is that London had lost its production specialism in Group II, what concentration of Group II remained was to be found in the RoSE region; although even this was at a less significant level than in 1984.

²⁴ This industry is marginally less than 45% but this category suffers under counting.

The impact of these patterns of employment changes can be seen clearly in Table 12 which presents an industry by industry breakdown of employment change comparing Britain, RoSE and London²⁵. In Group I we can note that the growth in advertising has occurred in the RoSE and Britain, but not in London. Interestingly both Film, and Authors and composers categories registered greater than national levels of decline in the RoSE, but substantial growth in London: the net result being a tendency to increased concentration of these industries. In much of Group II the degree of decline is greater in London than either the RoSE or GB indicating a structural shift which is related to group specific absolute employment decline. In Group III the decline of employment in the Printing and publishing of newspapers in London is clearly illustrated, this is reflected across Britain, except that the RoSE region has gained: most likely due to the establishment of regional printing works. The success story of this Group would seem to be the anomalous growth in the Printing and publishing of books (but, see comment above). In Group IV the only unusual aspects of change are the low growth rates for Libraries and museums in London. Explanation here will most likely lay in the field of three processes: general decline of public funding, and differential investment in information technology rather than curatorial staff, exacerbated by a dispersal of facilities (especially new regional museums) (see Casey et al. 1996).

The key points to note from this brief indicative overview of employment changes in the CIPS in the core regions are that London does not simply reflect trends in either the RoSE or GB; rather, it demonstrates certain unique dynamics. If we accept that London is a global city we might expect its local or national CIPS to be linked in to a global CIPS. Evidence from an analysis of balance of trade statistics (see Pratt 1997), which demonstrates a positive balance of trade in the cultural industries as a whole, does support this notion. Likewise, the well reported international art market, book publishing, and music industries, as well as to a

²⁵ The London base figure represents 50% of all GB employment in this industry, so a small percentage change is significant in absolute employment numbers.

lesser extent the film and television industries, all have London as a key node in their global production systems.

The analysis presented here does suggest that London may have its own unique agglomeration economies and institutions. However, the future robustness of these characteristics is difficult to ascertain with secondary level analysis such as that presented in this paper. What is clear is that there has been a strong trend of restructuring within the CIPS which has been exaggerated at the regional level depending upon pre-existing patterns of concentration. Thus, the absolute and relative decline in Group II employment in London. Coincident with this - and it is difficult to entirely untangle the process - there has been a differential process of employment dispersal and agglomeration in different industries. For example, activities such as Advertising, Libraries and museums, and Printing and publishing of newspapers have grown and dispersed from London, whilst there has been growth and concentration in Film, Radio and television, Authors and composers, and Printing and publishing of books.

Conclusions

This paper has sketched out a robust and conceptually grounded definition of the cultural industries. In so doing, it has stressed the importance of situating the cultural industries within a broader social and political context. This point was practically developed in this paper by proposing that the CIPS was a more significant unit of analysis rather than the individual firm, the sub-market, or industry. The main body of this paper has been concerned with the operationalization of the concept of the CIPS with respect to an analysis of employment change in Britain. It is clear that the available secondary data sources are far from ideally suited for such an analysis. The primary problem stems from the classification system used in census collection. In an attempt to sidestep some of these problems a re-classification of industries was carried out. Even so, some cultural industries still remain only partially visible to this type of analysis. Nevertheless, despite these limitations, a comprehensive analysis was carried out.

In a relatively short time period there were some significant changes in the structure and pattern of employment in the CIPS; far more than the modest overall employment decline of -1.7% would suggest. These trends are notable for their regional impacts; notably, a reduction of urban concentration. The most dramatic changes have occurred either in particular localities, or in particular industries.

London emerges as the core location of the CIPS. The restructuring of the CIPS has been most marked in London. Moreover, the pattern of restructuring in London has been different to that experienced in the rest of the country. Most notably, employment in infrastructure (Group II) has been lost and that in creative industries (Group I) has been gained. The explanation of such a shift is far from obvious. Some indication of the dynamics of organization and control of individual companies, and the interactions of the CIPS has been referred to earlier in this paper. However, there are clearly further dimensions of change that are obscured by the census taxonomies that underpin even this reformed analysis. Nevertheless, from the more detailed analyses that have been carried out two lines of argument seem worth pursuing.

First, that the CIPS, or at least significant parts of it such as the newspaper industry, have experienced a restructuring common to the manufacturing industries as a whole: namely decentralization of production facilities and associated employment, as well as absolute employment decline. In the case of the Printing and publishing of newspapers the rapid adoption of new technology and new organizational practices were of particular importance. However, from what evidence there is, it seems clear that such a pattern will not be replicated across the other cultural industries. Driver and Gillespie's (1993a, 1993b) research into the impacts of the adoption of new technology in the Printing and publishing of periodicals industry suggests a far milder impact of technological change, and relocation. Observations such as this point to the need for a greater attention to the social and organizational context of the adoption of new technologies on an industry by industry basis. Even within the same

technological paradigm new forms of governance and regulation can also have significant effects on the number, form and distribution of employment. The reorganization of the television industry is a case in point.

A second, and complementary, line of argument concerns the globalization of the CIPS; in particular that which is located in London. It is clear that the CIPS, which is dominated by London, is linked into a global CIPS. Evidence for this can be drawn from the export orientation of many of the key cultural industries (as demonstrated by the balance of trade statistics), as well as the epiphenomenon of the promotion of 'swinging London: the coolest place on earth' by the media and fashion industries. The increasingly global orientation of the London CIPS is not without its potential problems. First, there is the danger of disengagement from the British CIPS, London becoming an outlier, or a node, in a global system and not strongly linked to the British regions. This might have negative implications for British urban areas attempting to bootstrap their economies on the rise of the cultural industries. Second, the decline of productive capacity in Group II (infrastructure) of the CIPS could undermine both London's and Britain's role in the global CIPS. This is because of the apparently growing importance of control of both software and hardware resources as the process of technological convergence gathers pace²⁶. The trend towards a 'creative city' based primarily on Group I activities might not be a sustainable strategy for London in the long term. Analyses of the restructuring and reorganization of key cultural industries (such as music, film, video and television) have emphasised the importance of strategic control over both software and hardware resources in a production system. An important role of future work might be to explore such a hypothesis in the current context of the London CIPS.

Perhaps the key issue that this analysis has highlighted has been the need for a clear conceptualization of the CIPS. The analysis indicates what a dynamic and rapidly changing

²⁶ This is not only the case in computer orientated industries, but true more generally of a closer integration of ideas and means of reproducing, distributing and exchanging them.

nature of the structure and location of the CIPS. The tendency towards convergence in terms of both technology and production organization is likely to strengthen this. In so doing the analysis has highlighted the interrelationships that exist within the CIPS: this suggests that even the strongest industries may be dependent upon the vitality of the smaller and weaker industries for vital skills, products and services. It is becoming clear in the late 1990's that the CIPS may well have to be redefined in the future to include the computer, telephone and communications industries industry given the dynamic nature of changes in technology and organization. Clearly, further analyses that take the account up to the present day are now required, as is comparative work with other CIPS in other cities and nations.

A clear concept of what the CIPS consists of will underpin the validity of any future analyses. A key point will be that technological, social and business organisational changes will necessitate the empirical redefinition of the CIPS periodically. Attention will also need to be focused on the spatial dynamics of the CIPS at global, national, regional and urban scales. Despite the fact that so many of the cultural industries use computer based technologies that could be, potentially, networked across space there is a continuous manifestation of new spatial concentrations of such activities. The latest examples are the numerous multimedia 'gulches', 'alleys' and 'quartiers' that have emerged around the world in the mid-1990's. This simply re-inforces the need for more detailed analysis of the local dynamics of these activities and the integration of their social, cultural, economic and technological dimensions.

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Appendix 1: The range of cultural industries; and the cultural industries production system, 1991.

Tables 1 and 2: Previous analyses of the cultural industries a comparison of definitions

Definitions of cultural industries and cultural sectors (for employment classification). 4-digit codes derived from the Standard Industrial Classification (1980)

Table 1: Definition used in Cultural Trends (1986; 1993)

9711 Film production, distribution and exhibition
9741 Radio, television and theatre
9760 Authors, composers, own account artists etc
9770 Libraries, museums and galleries.

Table 2: 2: Definition used in O'Brien and Feist (1995)

3452 Gramophone records and pre-recorded tapes
4751 Printing and publishing of newspapers
4752 Printing and publishing of periodicals
4753 Printing and publishing of books
9711 Film production, distribution and exhibition
9741 Radio, television and theatre
9760 Authors, composers, own account artists etc
9770 Libraries, museums and galleries.

Table 3: The cultural industries production system used in this analysis

I. Original production, commissioning and directing

8380 Advertising
9711 Film production, distribution and exhibition
9741 Radio and television services, theatres, concert halls etc
9760 Authors, music composers and other own account artists

II. Production of the means of production/ infrastructure

2552 Printing ink
2591 Photographic materials and chemicals
3276 Printing book binding and paper goods machinery
3443 Radio and electronic capital goods
3453 Active components, subassemblies and components mainly for consumer goods
3454 Electronic consumer goods, other electronic equipment not specified elsewhere
3733 Photographic and cinematographic equipment
4920 Musical instruments
4930 Photographic processing laboratories

III. Reproduction, and mass distribution

3452 Gramophone records and pre-recorded tapes
4751 Printing and publishing of newspapers
4752 Printing and publishing of periodicals
4753 Printing and publishing of books
4754 Other printing and publishing

IV. Sites of exchange of rights to consume

6530 Retail distribution of books and stationery
6630 Night clubs
9770 Libraries, museums, art galleries

Table 4: Additional cultural industries not included in the cultural industries production system.

V. Derived consumption and tourism,

6611 Eating places
6612 Takeaway food shops
6620 Public houses/bars
6640 Canteens/messes
6650 Hotel trade
6670 Other tourist/short-stay accommodation
9690 Tourist office/other community services

VI Sport

9791 Sport and other recreational services

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Group	1991: Total	1991: %	Change: 1984-91
I: original production	155000	15.9%	3.7%
II: infrastructure	201000	20.7%	-19.4%
III: reproduction	336000	34.6%	-3.5%
IV: exchange	280500	28.8%	15.6%
Totals	972000	100.0%	-1.7%

Table 5: Employment in the CIPS, by Group

Source: Office of National Statistics(NOMIS), © crown copyright, 1996

	1984 male, full-time	male, part-time	female, part-time	female, full-time	all employees
I: original production	76000	6500	44500	22500	149500
II: infrastructure	163000	1500	71000	13500	249000
III: reproduction	217500	13000	91000	28000	348000
IV: exchange	54500	38000	47500	102500	242500
Total	511000	59000	254000	166500	989000

	1991 male, full-time	male, part-time	female, part-time	female, full-time	all employees
I: original production	76000	7000	53500	18000	155000
II: infrastructure	129500	2000	58500	10500	201000
III: reproduction	193000	8500	103500	31500	336000
IV: exchange	64000	43000	57000	116500	280500
Total	462500	60500	272500	176500	972000

Table 6: Gender breakdown, by full-time or part-time, by sector, Britain: 1984 and 1991
Source: Office of National Statistics(NOMIS), © crown copyright, 1996

SIC: Cultural industry	Total 1991	% change:1984-91
8380: Advertising	45500	8.2%
9711: Film production	24000	-3.7%
9741: Radio & TV services	74500	4.7%
9760: Authors & composers	11000	-3.8%
2552: Printing ink	5500	7.2%
2591: Photographic materials	7500	-11.6%
3276: Printing & bookbinding	12500	-4.4%
3443: Radio & electronic goods	50000	-31.6%
3453: Active components	34000	-47.7%
3454: Electronic consumer goods	65500	16.5%
3733: Photographic equipment	6000	-23.8%
4920: Musical instruments	2000	-29.3%

4930: Photographic processing	17500	2.0%
3452: Gramophone records	4500	-21.5%
4751: Printing & publishing newspapers	76500	-27.8%
4752: Printing & publishing periodicals	20500	4.3%
4753: Printing & publishing books	19500	50.8%
4754: Other printing & publishing	214500	5.5%
6530: Retail distribution, books	70500	56.9%
6630: Night clubs	141000	1.3%
9770: Libraries, museums & art galleries	68500	17.8%
Total, all cultural industries	972000	-1.7%

Table 7: Cultural industries employment 1991, and percentage change 1984-91
Source: Office of National Statistics(NOMIS), © crown copyright, 1996

Region	CIPS: 1984		CIPS: 1991		CIPS change 1984-91	GB: All industry change 1984-91
	Total	%	Total	%		
RoSE	215000	21.7%	199500	20.5%	-7.1%	5.5%
East Anglia	30500	3.1%	34500	3.5%	12.5%	9.8%
London	266500	26.9%	229500	23.6%	-13.9%	-6.0%
South West	67000	6.8%	75000	7.7%	11.9%	10.4%
West Midlands	61500	6.2%	66000	6.8%	7.7%	2.7%
East Midlands	47000	4.7%	57000	5.9%	21.7%	4.8%
Yorkshire & Humberside	59500	6.0%	69500	7.1%	16.0%	4.6%
North West	92500	9.3%	88500	9.1%	-4.2%	3.3%
North	42500	4.3%	40500	4.2%	-4.7%	3.6%
Wales	33500	3.4%	40000	4.1%	20.0%	8.8%
Scotland	74500	7.5%	72500	7.5%	-2.4%	5.3%
Great Britain	989000	100.0%	972000	100.0%	-1.7%	3.5%

Table 8: Distribution of CIPS, by region, and change 1984-91 compared to all GB industry
Source: Office of National Statistics(NOMIS), © crown copyright, 1996

Group	1991					
	GB: Total	All cities	London	Cities as % of GB		London as % of GB
I: original production	155000	102000	78000	65.7%	50.4%	
II: infrastructure	201000	52500	24000	26.1%	12.0%	
III: reproduction	336000	129000	87500	38.4%	26.0%	
IV: exchange	280500	106500	40000	38.0%	14.3%	
Totals	972000	390000	230000	40.1%	23.6%	

Group	1984					
	GB: Total	All cities	London	Cities as % of GB		London as % of GB
I: original production	149500	97000	72500	64.8%	48.5%	
II: infrastructure	249000	87000	52000	34.9%	21.0%	
III: reproduction	348000	164000	107500	47.1%	30.8%	

IV: exchange	242500	96000	34500	39.6%	14.3%
Totals	989000	444000	266500	44.8%	26.9%

Table 9: Concentration of CIPS in major cities: 1984-1991

Source: Office of National Statistics(NOMIS), © crown copyright, 1996

Region	CIPS as % of regional total		Location Quotients	
	1984	1991	1984	1991
RoSE	5.7%	5.0%	120.6%	111.9%
East Anglia	4.3%	4.4%	89.6%	96.7%
London	7.7%	7.1%	162.2%	156.5%
South West	4.3%	4.4%	90.9%	97.0%
West Midlands	3.1%	3.2%	65.1%	71.9%
East Midlands	3.2%	3.7%	67.7%	82.8%
Yorkshire & Humberside	3.4%	3.7%	70.9%	82.9%
North West	4.0%	3.7%	84.7%	82.7%
North	4.0%	3.7%	84.4%	81.8%
Wales	3.8%	4.2%	79.3%	92.1%
Scotland	3.9%	3.6%	82.3%	80.4%
Great Britain	4.7%	4.5%	n.a.	n.a.

Table 10: Regional concentration of CIPS

Source: Office of National Statistics(NOMIS), © crown copyright, 1996

Group	GB	RoSE	London
I: original production	3.7%	-11.3%	7.8%
II: infrastructure	-19.4%	-24.4%	-53.9%
III: reproduction	-3.5%	-1.1%	-64.0%
IV: exchange	15.6%	28.8%	15.6%
Total	-1.7%	-7.1%	-13.9%

Table 11: Group level change, by core regions:1984-91

Source: Office of National Statistics(NOMIS), © crown copyright, 1996

SIC: Cultural industry	Britain	RoSE	London
8380: Advertising	8.2%	5.9%	1.0%
9711: Film production	-3.7%	-28.7%	19.4%
9741: Radio & TV services	4.7%	3.1%	7.9%
9760: Authors & composers	-3.8%	-45.7%	17.0%
2552: Printing ink	7.2%	0.1%	-21.2%
2591: Photographic materials	-11.6%	-19.6%	-25.6%
3276: Printing & bookbinding	-4.4%	-34.6%	-41.5%
3443: Radio & electronic goods	-31.6%	-28.5%	-58.9%
3453: Active components	-47.7%	-54.3%	-74.3%
3454: Electronic consumer goods	16.5%	8.3%	-58.4%
3733: Photographic equipment	-23.8%	-34.3%	-84.2%
4920: Musical instruments	-29.3%	-32.4%	-73.3%

4930: Photographic processing	2.0%	7.4%	-2.0%
3452: Gramophone records	-21.5%	-60.1%	-36.4%
4751: Printing & publishing newspapers	-27.8%	16.3%	-56.0%
4752: Printing & publishing periodicals	4.3%	-14.3%	-1.2%
4753: Printing & publishing books	50.8%	65.2%	73.1%
4754: Other printing & publishing	5.5%	-6.6%	5.2%
6530: Retail distribution, books	56.9%	53.6%	47.2%
6630: Night clubs	1.3%	15.1%	5.4%
9770: Libraries, museums & art galleries	17.8%	26.4%	2.3%
All CIPS	-1.7%	-7.1%	-13.9%

Table 12: CIPS: industry level, local change : 1984-91

Source: Office of National Statistics(NOMIS), © crown copyright, 1996

Group	Total	Percentage
I: original production	155000	6.4%
II: infrastructure	201000	8.2%
III: reproduction	336000	13.8%
IV: exchange	280500	11.5%
V: Tourism	1131500	46.4%
VI: Sport	334000	13.7%
Total	2437000	100.0%
% of all GB employment		11.3%

Source: Office of National Statistics(NOMIS), © crown copyright, 1996