The Cultural and Creative Economy in the Brussels-Capital Region (and Flanders)

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Content

1. Publications, studies, reports

2018

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The cultural and creative economy in Brussels-Capital Region

L'économie culturelle et créative dans la Région de Bruxelles-Capitale
De Culturele en Creatieve Economie in het Brussels Hoofdstedelijk Gewest

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Traduction(s) :
De Culturele en creatieve economie in het Brussels Hoofdstedelijk Gewest [nl]
L'économie culturelle et créative dans la Région de Bruxelles-Capitale [fr]

Idea Consult.
Analyse des liens entre l'industrie wallonne, les services à haute intensité de connaissances et les industries créatives et culturelles, dans une perspective de chaînes de valeur.
Idea Consult, 2014.

E. Lazzaro and J.-G. Lowies.
Le poids économique des industries culturelles et créatives en Wallonie et à Bruxelles.
Etudes thématiques, 2014.

J. Schrauwen, M. Demol, W. Van Andel, A. Schramme, DC Flanders, and Antwerp Management School.
Creatieve industrieën in Vlaanderen - update.
DC Flanders, 2014.

2. The population of firms

CC Entities, Size and Evolution

Table 1: Number of CC entities and % of economy

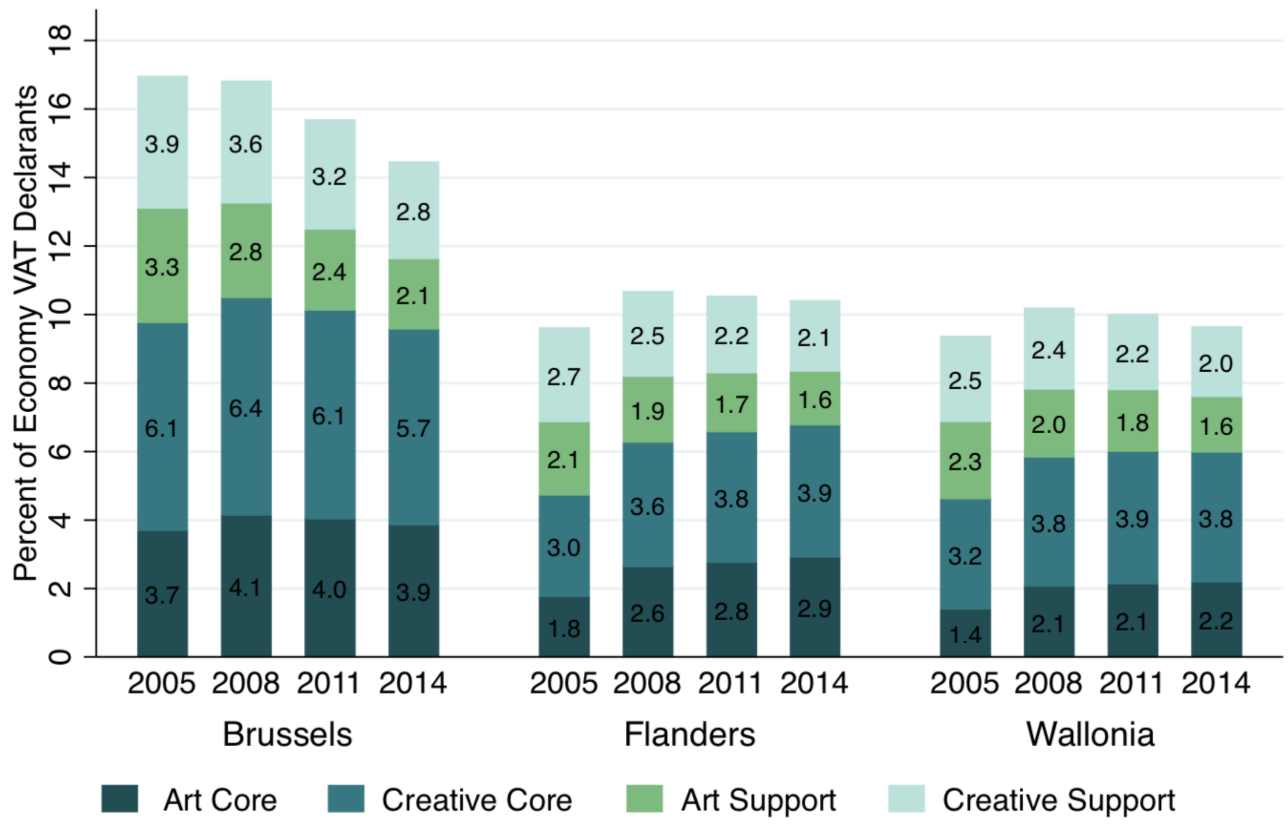
	2008	2014
Brussels	13467 (16.8)	13654 (14.5)
Flanders	48761 (10.7)	53241 (10.4)
Wallonia	21387 (10.2)	22106 (9.7)

How to read

- The number of entities offers a first indication of the importance of the sector
- CC entities are on average smaller than non CC entities (see Turnover)

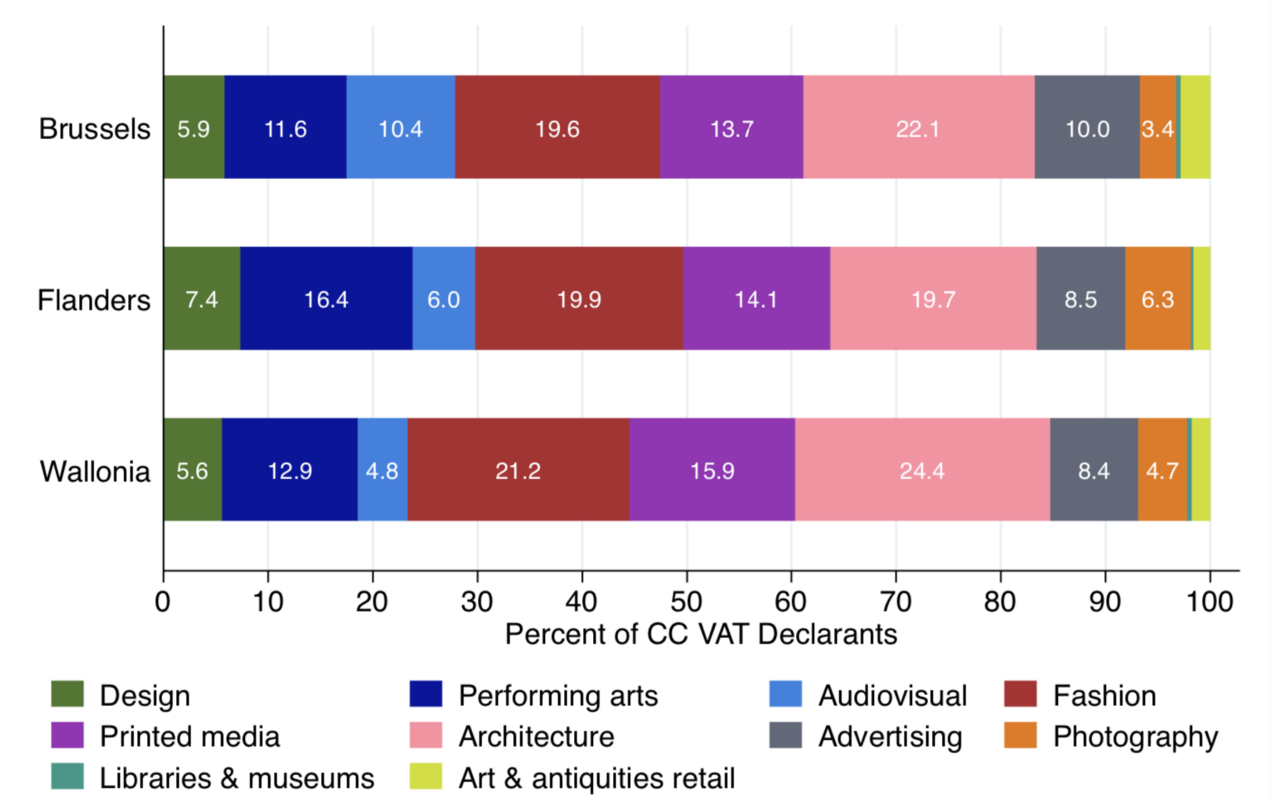
- Number of CC entities is increasing in absolute terms but decreasing as share of the economy
- Share of CC entities is higher in Brussels than in the other regions
- 18% are startups (25% in the overall economy)
- 40% are natural persons (30% in the overall economy)

CC Entities, Size and Evolution



CC Entities - Sector Decomposition 2014

- Large number of companies in Fashion and Architecture
- Larger share of Audiovisual and Advertising for Brussels



3. Turnover

CC Turnover, Size and Evolution

Table 2: CC Turnover in millions and % of economy

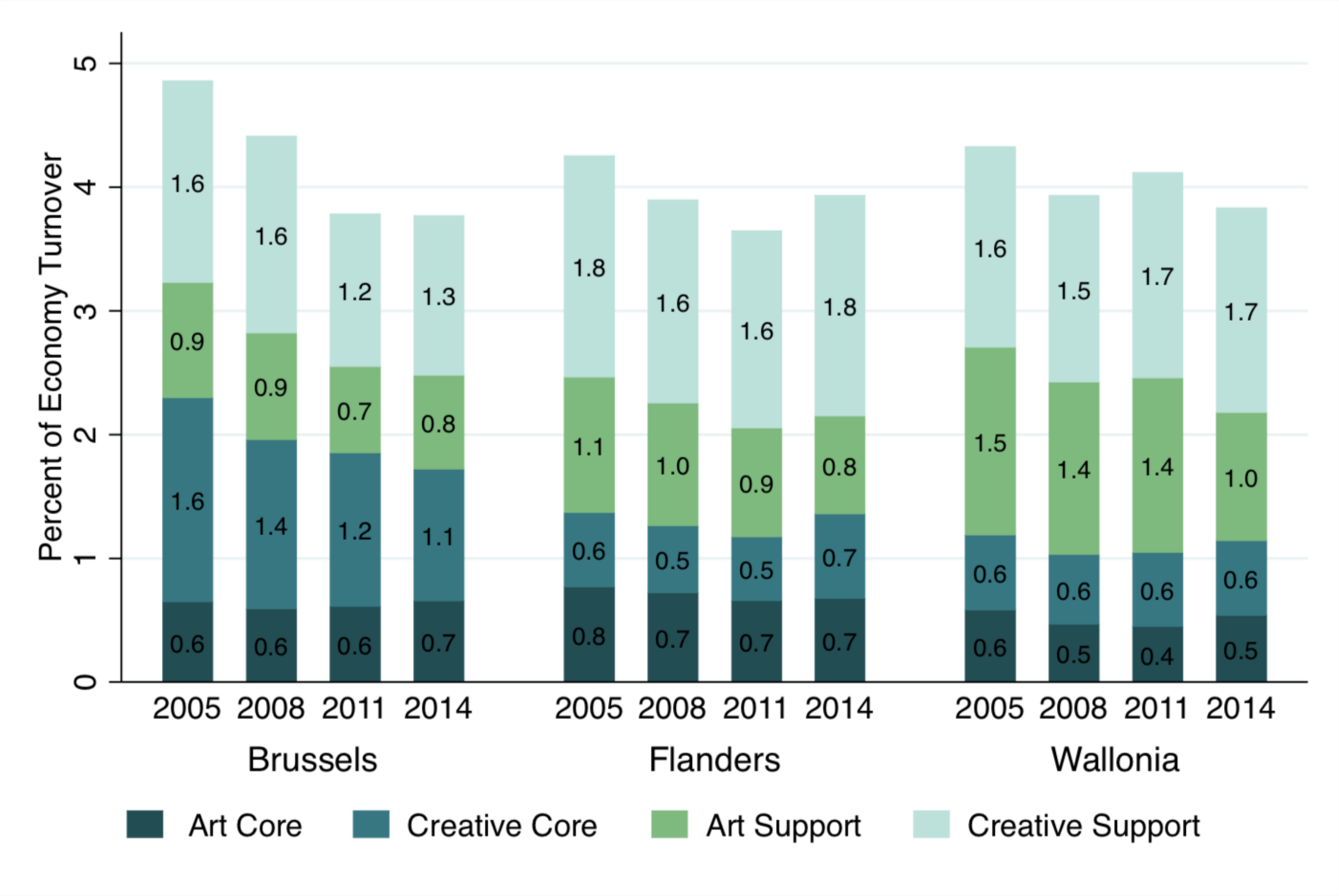
	2008	2014
Brussels	11720 (4.4)	10031 (3.8)
Flanders	19738 (3.9)	22321 (3.9)
Wallonia	4839 (3.9)	5204 (3.8)

How to read

- Amount of market sales of goods and services
- Size depends on the firm's place in the value chain
- Valid indicator for analyzing the impact of the crisis

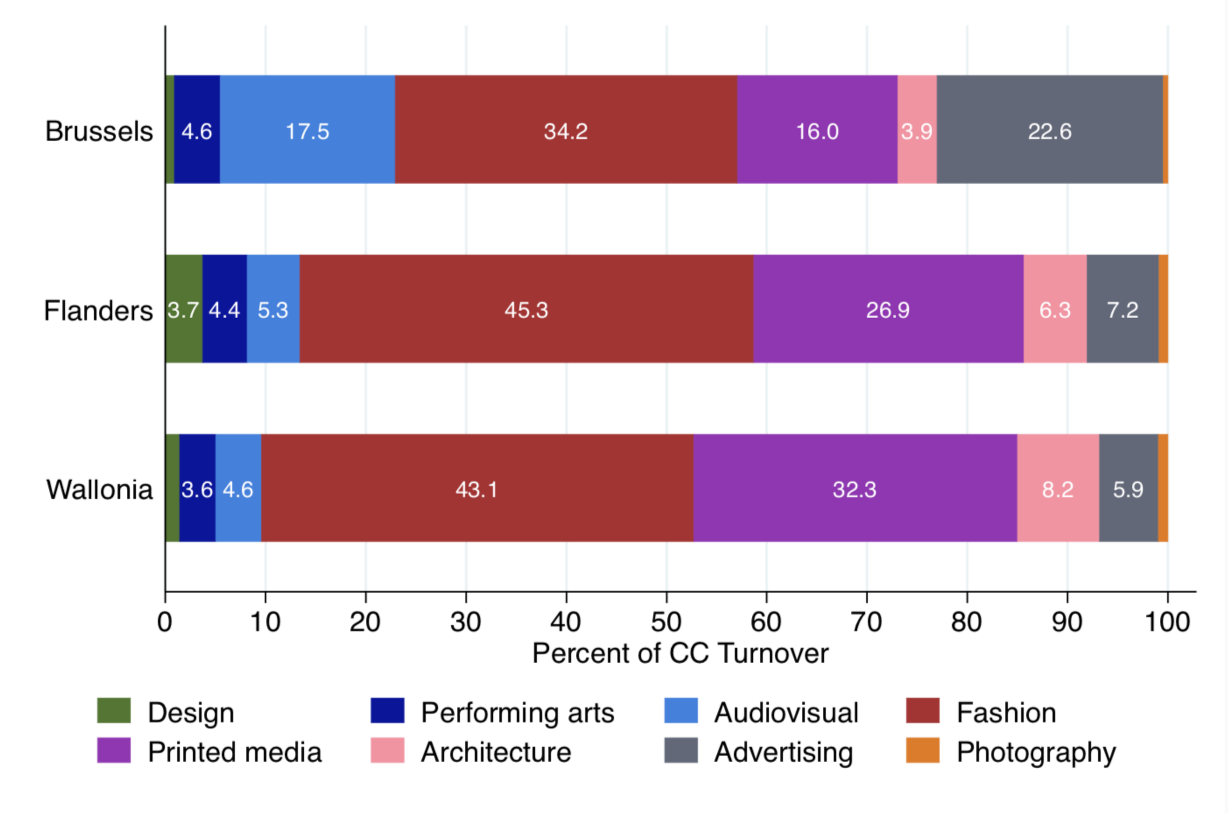
- CC Turnover has been decreasing in Brussels, both in absolute and relative terms, CC sectors have yet to return to 2008 performance levels, except for Audiovisual and Design

CC Turnover, Size and Evolution



CC Turnover, Sector Decomposition 2014

- Advertising and Audiovisual are important in Brussels
- Fashion is the largest sector for all regions (fashion retail)



4. Value added

CC Value Added, Size and Evolution

Table 3: CC VA in millions and % of economy

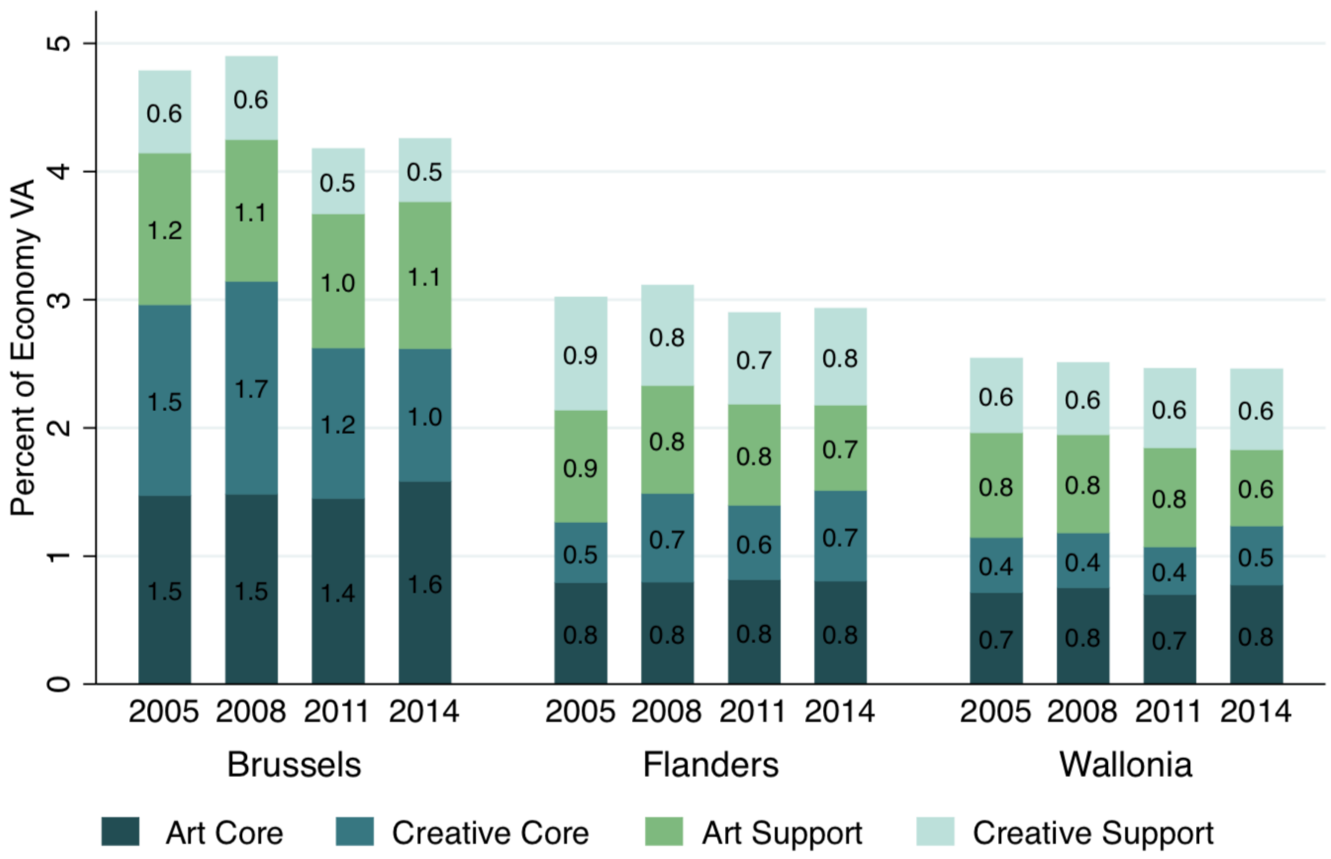
	2008	2014
Brussels	2836 (4.9)	2794 (4.3)
Flanders	5701 (3.1)	6136 (2.9)
Wallonia	1902 (2.5)	2051 (2.5)

How to read

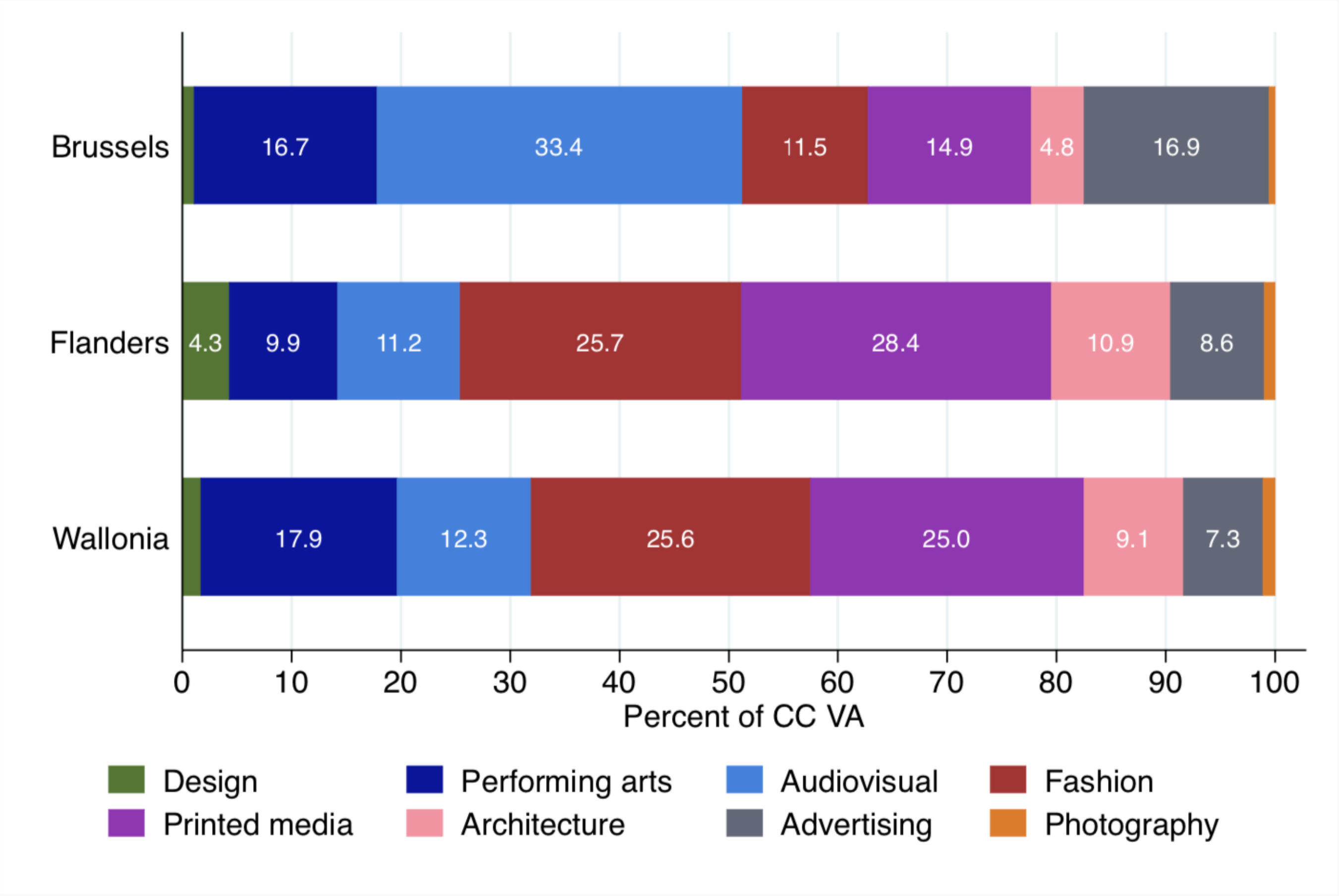
- Equivalent to turnover minus non-labor inputs
- Gross value added is used to measure GDP
- Important measure for the contribution of a sector to the economy

- The CC sectors in Brussels have yet to return to the share of the economy they represented in 2008
- The share of CC turnover is higher in Brussels than in the other regions
- The CC economy in Brussels is higher in the value chain than it is in the other regions (role of Advertising and Audiovisual)

CC Value Added, Size and Evolution



CC Value Added, Sector Decomposition Brussels 2014



5. Employment

CC Employment, Size and Evolution

Table 4: CC Employment in thousands and % of economy

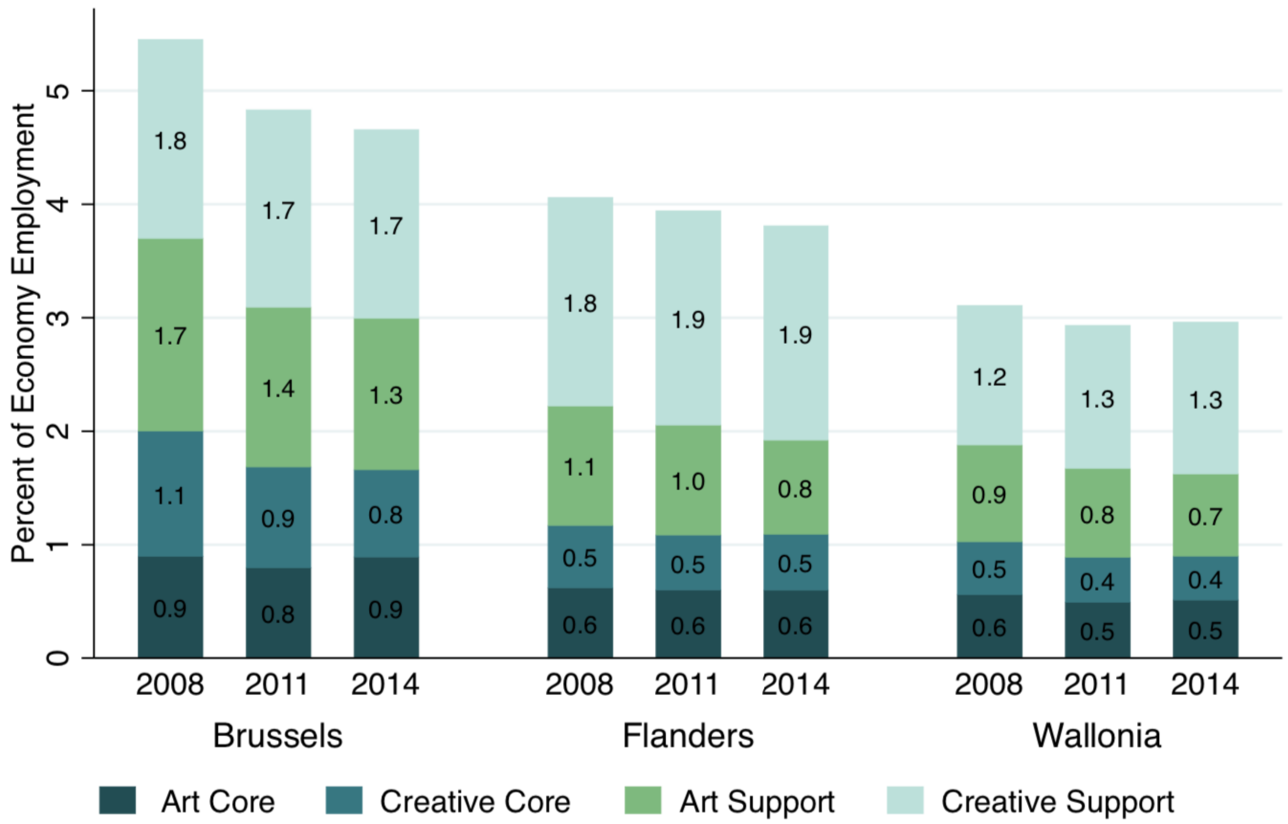
	2008	2014
Brussels	36.6 (5.45)	32.3 (4.66)
Flanders	104.9 (4.06)	100.9 (3.8)
Wallonia	37.0 (3.11)	36.0 (2.96)

How to read

- Number of effective workers includes both employees and self-employed, avoiding double-counting
- Full-time equivalent employment is a better measure where many work part-time

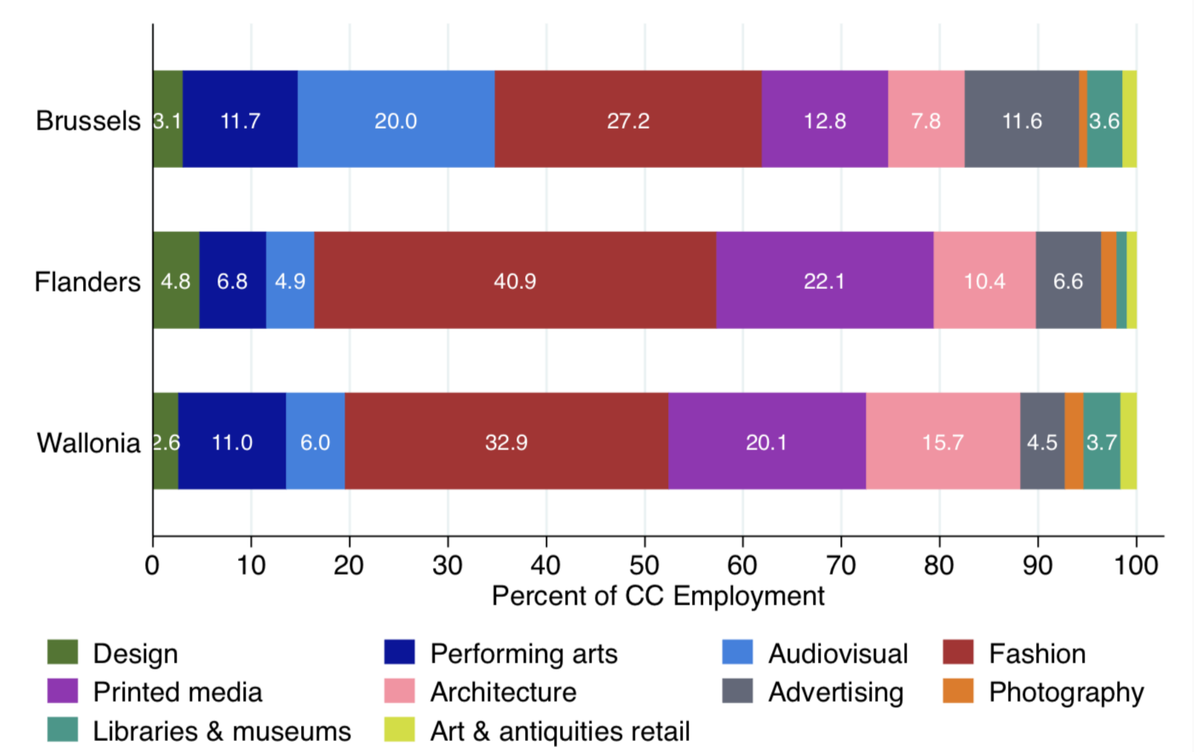
- The CC share of employment is larger in Brussels than in the other regions but has decreased more
- In Brussels in 2014, 18.3% of workers in the CC economy were self-employed, this was the case for only 11% of workers in the BCR economy overall

CC Employment, Size and Evolution

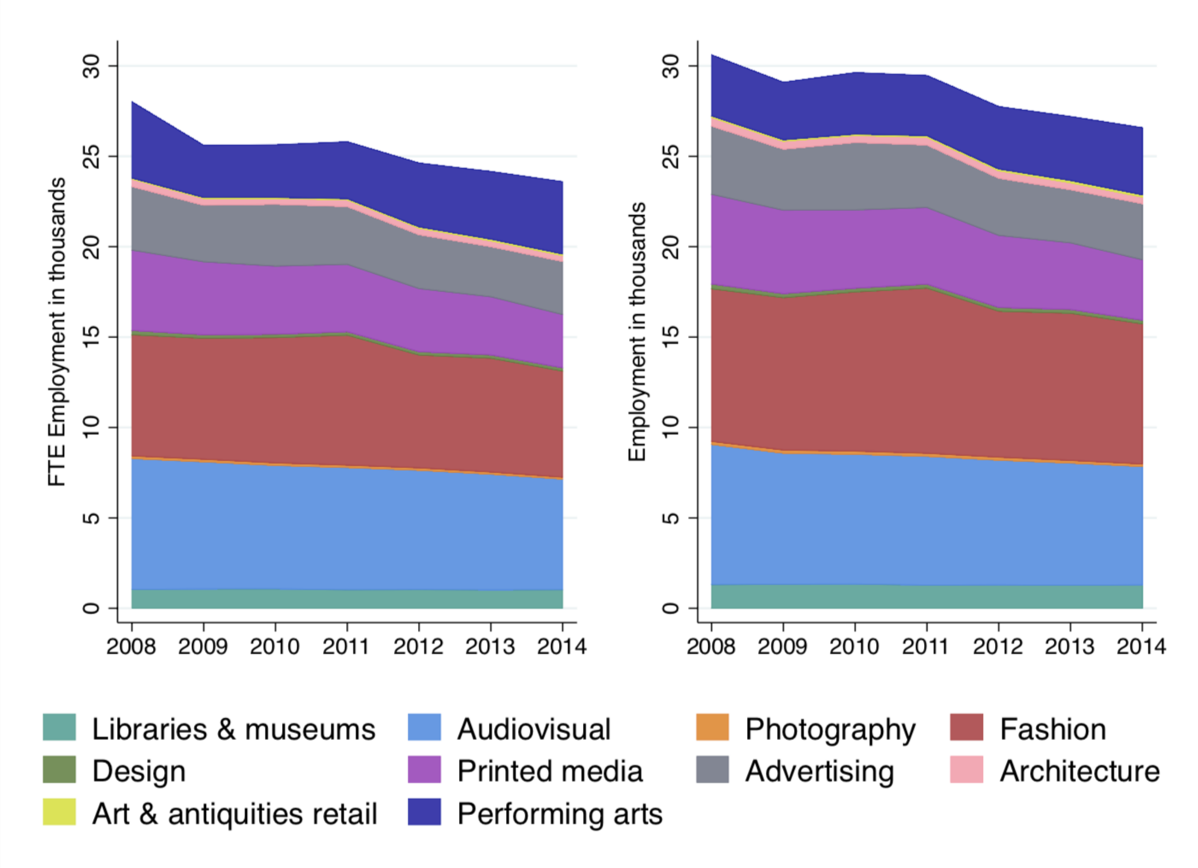


CC Employment, Sector Decomposition 2014

- Advertising and Audiovisual are particularly large in Brussels
- Fashion is the largest sector by number of effective workers in all the regions



CC Employment, Sector Decomposition Brussels



- In Brussels in 2014, 31% of the CC workf. was employed part-time

6. Summary & recommendations of the BCR study

Summary: The CC Economy

Table 6: N of CC entities in th.

	2008	2014
Brussels	13.5 (16.8)	13.7 (14.5)
Flanders	48.8 (10.7)	53.2 (10.4)
Wallonia	21.4 (10.2)	22.1 (9.7)

Table 8: CC Turnover in millions

	2008	2014
Brussels	11720 (4.4)	10031 (3.8)
Flanders	19738 (3.9)	22321 (3.9)
Wallonia	4839 (3.9)	5204 (3.8)

Table 7: CC Employment in th.

	2008	2014
Brussels	34.6 (5.1)	29.7 (4.3)
Flanders	97.9 (3.8)	92.5 (3.5)
Wallonia	29.2 (2.45)	28.1 (2.3)

Table 9: CC VA in millions

	2008	2014
Brussels	2836 (4.9)	2794 (4.3)
Flanders	5701 (3.1)	6136 (2.9)
Wallonia	1902 (2.5)	2051 (2.5)

Conclusion: The CC Economy

Brussels is special:

- The CC economy is more important in value added and employment in Brussels than in the other regions
- Brussels CC economy stands out for the importance of its Audiovisual and Advertising sectors, although CC sectors cluster in different parts of Brussels
- Though the CC economy has shrunk over time, core CC sectors have been resilient

The CC workforce is special:

- The creative core provides high value employment
- Many workers in creative occupations are outside the CC economy

Recommendations

Make data better and easier to access:

- Ready-to-use public use micro data with detailed metadata
- Harmonization/cooperation of data collecting institutions

Gain a better understanding of the CC economy:

- Shed light on CC activities in nonprofit and public sectors
- Put in place a monitoring tool for the sector on an annual basis
- Study creative work done in all parts of the economy
- Extend the analysis on the labor dynamics that characterize the work patterns of creative professionals
- Analyze the demand side, in particular for cultural consumption
- Study public funding and tax relief for the CC sectors

7. Recent / ongoing studies

7.1. Flanders (EWI–Vlaio–Flanders DC) (https://creatievesector.be)

7.2. OECD

→ first steps towards uniform methodology and data collection?

Thank you!

Questions?

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