

Creative Industries in the South of Scotland Report Summary - August 2022

In late 2021, EKOS were commissioned by South of Scotland Enterprise (SOSE) to undertake a detailed analysis of the creative industries sector in the South of Scotland region.

The overall aim of the project was to provide insight and knowledge to further develop SOSE's understanding of the creative and cultural industries sector in the South of Scotland and inform their current and future work to support the sector, both as it recovers from COVID-19 and meets the challenges and opportunities of the future, including the transition to a net zero economy.

Policy & Existing Research

There is a wide body of research relating to the creative industries in Scotland, which has long been recognised as a key growth sector of the economy. National policy remains highly supportive of the creative sector, reflected in the Scottish Government's recent National Strategy for Economic Transformation (2022) and the Cultural Strategy for Scotland (2020). The creative industries in Scotland are defined according to 16 sub-sectors:

Advertising	Architecture	Computer Games	Crafts	Cultural Education	Design	Fashion & Textiles	Film & Video
Heritage	Music	Performing Arts	Photography	Radio & TV	Software & Electronic Publishing	Visual Art	Writing & Publishing

At a regional level, the South of Scotland Regional Economic Strategy includes culture and creativity as one of its six key themes, aiming to position culture and creative industries at the heart of the region's economy. In particular, it highlights the importance of the creative industries to the region's visitor economy, as well as the sector's role in supporting community cohesion and a sense of identity.

Recently, SOSE have undertaken a major mapping exercise of the creative industries in the region - recognising the limitations of existing datasets, which miss out many freelancers working in the sector (who comprise a large proportion of the creative workforce). While this shows clusters of activity within and around the main towns, it also illustrates the dispersed and rural nature of the sector, with enterprises spread right across the region.

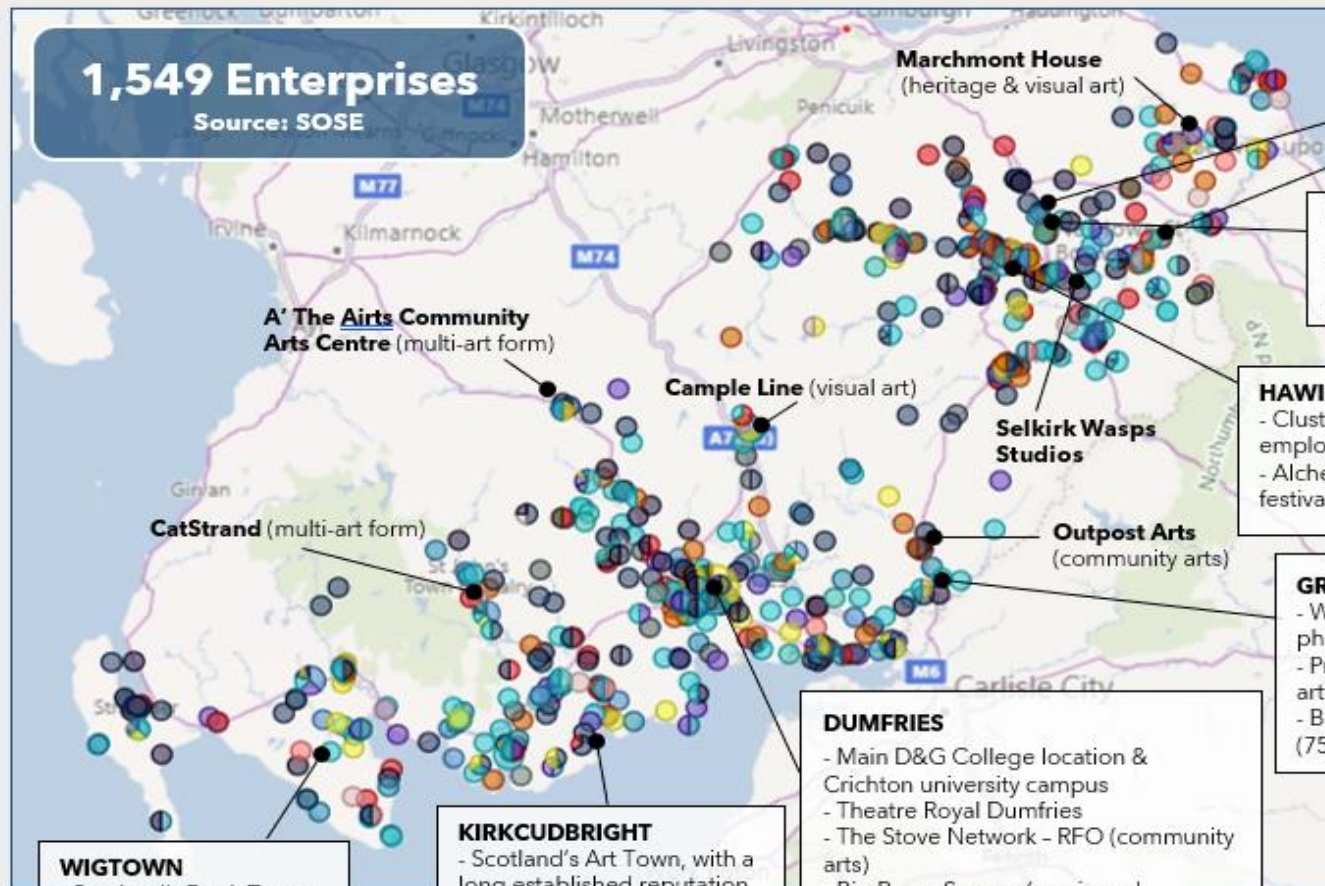


The map overleaf introduces some of the key locations and clusters of creative activity in the South of Scotland, as well as the location of all creative enterprises that have been mapped by SOSE.

The Creative Industries in the South of Scotland

1,549 Enterprises

Source: SOSE



GALASHIELS

- Main Borders College campus & Heriot Watt University's School of Textile & Design
- Great Tapestry of Scotland, opened 2021 (Live Borders)
- MacArts performance venue

Borders Art Fair (visual art)

MELROSE

- Abbotsford House (heritage)
- Borders Book Festival, November (literature)

HAWICK

- Cluster of textile businesses employing 600+ people
- Alchemy Film & Arts (RFO) & film festival, each spring

GRETNA GREEN

- Wedding industry cluster - photographers
- Proposed Star of Caledonia artwork
- Blacksmith's Shop attraction (750k visits/year)

DUMFRIES

- Main D&G College location & Crichton university campus
- Theatre Royal Dumfries
- The Stove Network - RFO (community arts)
- Big Burns Supper (music and community arts)
- Hollywood Trust (funder)
- Upland Arts CIC (visual arts and craft)
- Gracefield Arts Centre (DGC)

KIRKCUDBRIGHT

- Scotland's Art Town, with a long established reputation for visual arts and many small galleries and shops
- Kirkcudbright Gallery (DGC)
- Wasps Studios

WIGTOWN

- Scotland's Book Town, designated in 1998
- Wigtown Book Festival, each autumn - RFO (literature)

A' The Airts Community Arts Centre (multi-art form)

Cample Line (visual art)

Marchmont House (heritage & visual art)

Outpost Arts (community arts)

Selkirk Wasps Studios

CatStrand (multi-art form)

Location of all mapped organisations - by sub-sector

- Advertising
- Architecture
- Computer Games
- Crafts
- Cultural Education
- Design
- Fashion and Textiles
- Film and Video
- Heritage
- Music
- Performing Arts
- Photography
- Radio and TV
- Software/electronic publishing
- Visual Art
- Writing and Publishing

DUMFRIES & GALLOWAY WIDE:

- DG Unlimited - creative sector membership and support network
- Dumfries & Galloway Arts Festival, held each May (performing arts & music)
- Spring Fling Open Studios festival (visual arts and craft)
- Dumfries & Galloway Council libraries, galleries and museums

SCOTTISH BORDERS WIDE:

- Creative Arts Business Network - creative sector membership network
- Creative Informatics data-focused programme (Edinburgh and South East Scotland City Region Deal project)
- Scottish Borders Council libraries, galleries and museums, operated by Live Borders

Primary Research

Two surveys were distributed in early 2022, aimed at freelancers and sole traders (with 84 responses) and creative businesses and organisations (with 78 responses). These were promoted through various regional and local networks and organisations, with a mix of telephone interviews and online survey responses.

Profile

Around two-thirds of respondents identified that they work in more than one subsector of the creative industries, reflecting the diverse, portfolio careers that creative practitioners frequently pursue, particularly in rural areas. Over half of freelancers (58%) said that creative work is their primary source of income. 30% said they had started working as a freelancer in the sector in the last four years, while the remainder (70%) had five or more years' experience.

The majority of businesses/organisations (82%) said that they work in more than one subsector of the creative industries. Most were long established, with two-thirds (66%) being formed at least ten years ago and just 5% within the last year – an interesting finding in itself. More than half of responding businesses reported that their annual turnover is below £50,000 (59%), reflecting that the sector is comprised of a large number of small enterprises. Almost three-quarters of freelance and sole trader respondents (70%) earned below £10,000 per year on average from their creative work.

Opportunities and Challenges

Survey respondents were asked, through a series of different questions, for their views on the main opportunities for the creative sector in the region, and the challenges facing them directly as well as the wider sector. There was a strong crossover between the issues raised by freelancers and businesses/organisations.

	Freelancers and sole traders	Businesses and organisations
Opportunities and strengths	<ul style="list-style-type: none"> - Culture and the creative industries are an important part of the region's visitor economy offer - The SoS has a strong reputation for the creative industries, particularly certain sub-sectors (e.g. textiles) - Festival and events - Supports a sense of community 	<ul style="list-style-type: none"> - Important part of the visitor economy offer - Generates economic benefits and creates jobs - Supports community cohesion and quality of life - Emphasis on local products/services in response to climate emergency
Challenges and weaknesses	<ul style="list-style-type: none"> - Low incomes and insecure work - Access to funding opportunities - Access to opportunities to sell and promote their creative work - Transport and access issues in rural areas - Feeling of isolation 	<ul style="list-style-type: none"> - Lost income and work from COVID-19 - Rising costs - Lower consumer spending - Access to customers/market - Access to finance

Despite the challenges of COVID-19, most businesses and organisations felt that the next few years will see them either grow (47%) or return to a normal level of activity/turnover (36%), while a smaller proportion felt they may have to scale back activity (12%) or struggle to stay afloat (6%).

Future Opportunities and Priorities

The research has highlighted a number of areas where the South of Scotland has a distinct opportunity to grow and support activity within its creative sector.

Creative placemaking & supporting a regional identity

A growing area of expertise
in D&G

Net Zero: decarbonising the creative industries

Net Zero: community engagement and empowerment

Attracting funding and investment

by making the most of
regional strengths

Cultural tourism and events

Building on an existing
regional strength

Growing collaboration across the South

Sharing learning and best
practice

Attracting film and TV productions

Making the most of the
South's locations and recent
growth in the sector

The arts in health and wellbeing

Diversifying arts funding and
supporting positive health
outcome

Prioritising Fair Work