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Colección de Estadística y Estudios del Observatorio Vasco de la Cultura
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GAZES

an analytical reading of the data of the Statistics for the **Creative Industries**

2017

EUSKO JAURLARITZA
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1. Methodological Introduction

This Gazes report is the first devoted to the Creative Industries, with information from 2017. Starting out from the data obtained in each of the creative sectors analysed, the report contains a global vision of intentional gazes which allow us to delve deeper into the characterisation of the creative sectors as a whole.

It will be a biennial operation, like the Statistics of the Arts and Cultural Industries. Both have shared objectives and methodology. They are two tools which allow us to discover the fundamental characteristics of the Cultural and Creative Industries in the Autonomous Community of the Basque Country (CAE). In this case, it limits itself to agents who galvanise the so-called creative industries of the CAE from the private sector: 419 agents from the fashion, design, architecture, language industries, advertising and video game sectors. We insist that it is the first edition of the statistics, thus completing the study that the Basque Observatory of Culture has been carrying out since 2007 in the field of the Arts and the Cultural Industries.

The first chapter is devoted to presenting the big hitters of these sectors: how many agents make up the map, the jobs they generate and their territorial location. It is an overall panorama. Later on, an analysis of its industrial dimension and its sustainability is carried out; of its internal asymmetries and its sectoral profiles; of its internationalisation and, finally, of the distribution of its jobs from the gender perspective.

The preliminary work to take on this study of preparation and refinement of the starting censuses has allowed us to devote 2018 to field work to collect information. In 2019, analysis, refinement and exploitation of the results were carried out, and are presented here.

1.1. Data sheet

Naming of the operation	Statistics of the Creative Industry in the CAE
Operation status	Formalised by the Eustat
Periodicidad	Two-yearly
Class of operation	Census operation
Year the information was gathered	2018
Reference year of the information	2017
Company in charge of the field work	Siadeco
Census and response level	419 agents (70 architecture agents, 63 design agents, 70 of the language industry, 43 of the fashion industry, 148 of advertising, 25 of video games). Total level of response of 80.4%. Level of response of Architecture 81.4%. Level of response of Design 88.9%. Level of response of Language Industries 87.1%. Level of response of Fashion 58.1%. Level of response of Advertising 79.1%. Level of response of Video games 84.0%.

1.2. Conceptual definitions

Common requirements for all creative sectors:

- Only private companies in the creative industries are included; the self-employed and natural persons, in principle, do not form part of the statistics.
- Minimum employment for inclusion in the statistics: 3 workers (agents with fewer than 3 workers have not been included).
- The exception are companies in partnership with associations working as clusters, which are included, despite the number of workers being below 3.

Architecture	Construction companies are excluded.
Design	The design sub-sector of the creative industries are considered to be all those companies that provide design services to third parties (design studios) and those in which design is the main activity of the company (not manufacturing or marketing, for which design activities are also required in the company, even if this is one of their competitive advantages), have manufacturing and/or marketing activities associated with the self-publishing of their own designs.
Language Industries	Translation and interpreting companies, language technologies, linguistic consultancy and language teaching. List of companies validated by Langune in its totality, so it therefore includes companies of fewer than 3 workers.
Fashion	Includes only companies carrying out their own designs. Excludes companies whose activity is totally linked to manufacture.
Advertising	Creation, design and carrying out of advertising communication strategies and actions.
Video games	Does not include video game shops.

2. The Figures of the Creative Industries

2.1. Sectoral dimension

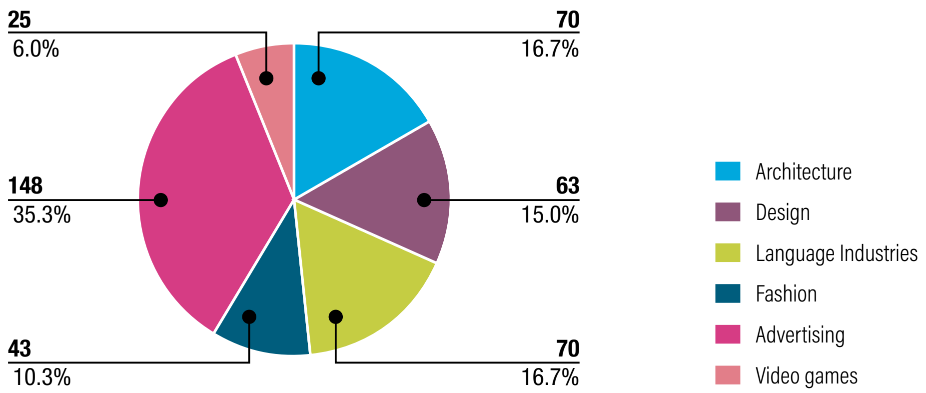
This first edition of the *Statistics of the Creative Industries* gathers information about 419 agents from the CAE which fulfil the requirements demanded to form part of the census. The map of agents forming part of the statistics is made up of:

- The **architecture** sector, comprising 70 companies.
- The **design** sector, comprising 63 agents.
- **Language industries**, comprising 70 agents.
- The **fashion** sector, comprising 43 companies.
- The **advertising** sector, comprising 148 agents among whom we find: creative agencies, media agencies, marketing service agencies, and communication consultants and public relations agencies.
- And the **video games** sector comprising 25 agents.

As can be observed in the following figure, the advertising sector has the greatest weight of agents (35.3%), followed by the architecture and language industries (16.7%), design (15.0%), the fashion sector (10.3%) and finally, the video games sector with the least weight in the creative sectors as a whole (6.0%).

Figure 1.

Agents by sector. Absolutes and percentage · 2017



In absolute terms, the balance of revenue and expenses of the creative industries is positive, with 43 million euros, which is 12.1% of revenue. Analysing them, it can be observed that 44.7% of the total is accrued by the advertising sector. Another sector which stands out for its volume of revenue is that comprising the language industries, representing 18.1% of the total of creative industries. With regard to expenditure, distribution by sector is similar to revenue.

Figure 2.

Total revenue and expenditure of agents by sector. Millions of euros and percentage · 2017

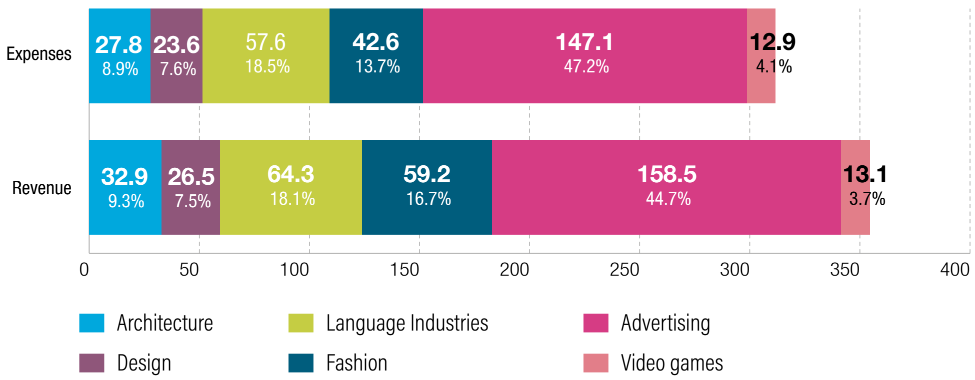


Figure 3.

Revenue, expenditure and balance by sector and agent typology. 2017

Sector	Revenue	Expenses	Balance	Percentage of the total income
	Thousand euro	Thousand euro	Thousand euro	%
Architecture	32,946.2	27,835.7	5,110.5	15.5%
Design	26,474.6	23,617.3	2,857.3	10.8%
Language Industries	64,262.7	57,576.9	6,685.8	10.4%
Fashion	59,220.2	42,589.9	16,630.3	28.1%
Advertising	158,506.7	147,063.5	11,443.2	7.2%
Video games	13,128.5	12,900.2	228,3	1.7%
Total	**354,538.9**	**311,583.4**	**42,955.4**	**12.1%**

The creative industries of the CAE employ 3,898.3 people. 68.1% of the weight of employment is distributed in the advertising sector (38.6%) and the language industries (29.5%). The sector accruing least employment is that of design (6.0%).

Figure 4.

Total people employed of agents by sector.
Working people equivalent to full-time annualised.

Absolutes and percentages · 2017

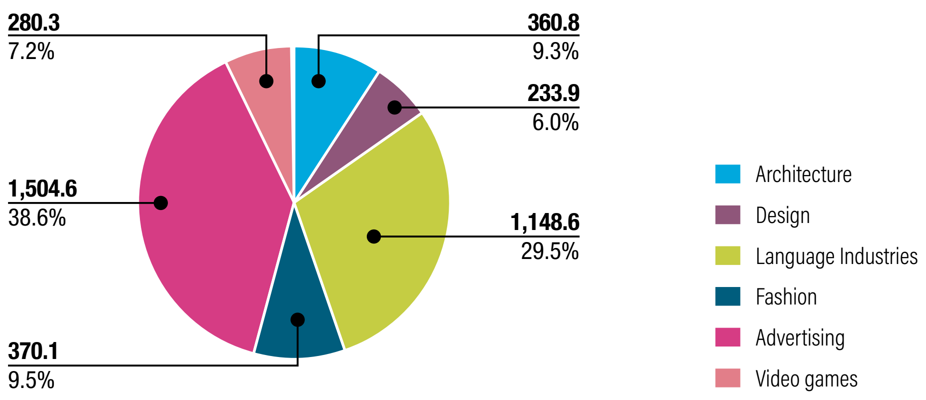


Figure 5.

Total people employed of agents by sector and agent typology.
Working people equivalent to full-time annualised.

2017

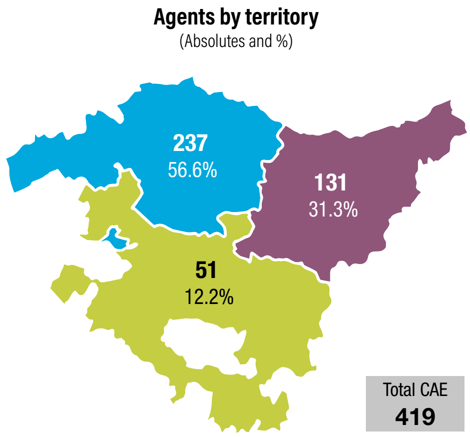
Sector	People employed	Percentage of the total of people employed
Architecture	360.8	9.3%
Design	233.9	6.0%
Language Industries	1,148.6	29.5%
Fashion	370.1	9.5%
Advertising	1,504.6	38.6%
Video games	280.3	7.2%
Total	**3,898.3**	**100.0%**

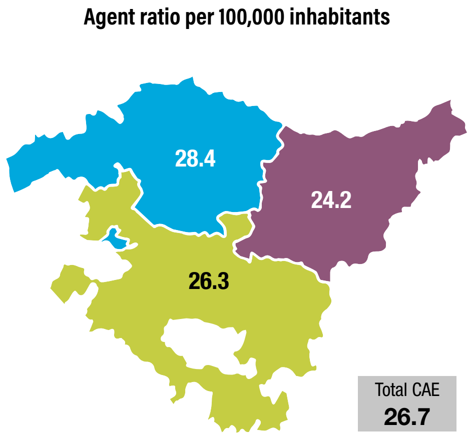
2.2. Territory

The territorial distribution of the creative industries of the CAE makes up a map in which Bizkaia concentrates half the agents, Gipuzkoa, 31.3% and Álava, 12.2%. In order to compare the territorial distribution taking into account the inhabitants of each territory, the ratio of agents per 100,000 inhabitants has been calculated. The data obtained are as follows: the ratio in Bizkaia is 28.4, in Álava, 26.3, and Gipuzkoa, 24.2.

Figure 6.

Agents by Historical Territory. Absolutes, percentages and ratio of agents per 100,000 inhabitants · 2017





If we analyse the data in greater detail, we can see the distribution by territory of each sector. This allows us to see that, although the majority of sectors are dominant in Bizkaia, the language industries are distributed similarly in Bizkaia and Gipuzkoa.

Figure 7.

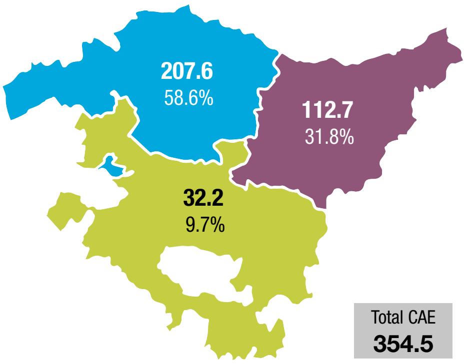
Agents by Historical Territory. Percentages · 2017

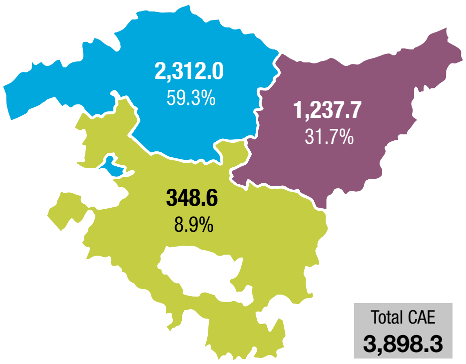
Sector	Álava	Gipuzkoa	Bizkaia
Architecture	17.1	24.3	58.6
Design	9.5	28.6	61.9
Language Industries	14.3	41.4	44.3
Fashion	2.3	27.9	69.8
Advertising	13.5	33.8	52.7
Video games	8.0	20.0	72.0
Total	**12.2**	**31.3**	**56.6**

In the case of revenue, more than 50% is concentrated in Bizkaia, 31.8% in Gipuzkoa, and 9.7% in Álava. In the case of employment, 59.3% is concentrated in Bizkaia and 31.7% in Gipuzkoa, and Álava maintains the weight observed before (8.9%).

Figure 8.

Revenue and employment of agents by Historical Territory. Millions of euros and percentages · 2017





The sectors occupying a greater volume of people employed are that of advertising (38.6% of people employed with regard to the total, 1,504.6 in absolute terms) and the language industries (29.5%; 1,148.6 in absolute terms); both occupy more than half of people employed in Bizkaia (66.5% and 50.1%, respectively).

Figure 9.

Revenue by Historical Territory. Absolutes (in thousands of euro) · 2017

Sector	Álava		Gipuzkoa		Bizkaia		Total	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Architecture	2,477.1	7.5	8,173.6	24.8	22,295.4	67.7	**32,946.2**	**100.0**
Design	3,028.4	11.4	6,850.9	25.9	16,595.4	62.7	**26,474.6**	**100.0**
Language Industries	5,713.8	8.9	26,263.8	40.9	32,285.0	50.2	**64,262.7**	**100.0**
Fashion	4,053.7	6.8	32,444.0	54.8	22,722.5	38.4	**59,220.2**	**100.0**
Advertising	18,598.1	11.7	36,328.1	22.9	103,580.4	65.3	**158,506.7**	**100.0**
Video games	376.4	2.9	2,605.3	19.8	10,146.9	77.3	**13,128.5**	**100.0**
Total	**34,247.6**	**9.7**	**112,665.6**	**31.8**	**207,625.7**	**58.6**	**354,538.9**	**100.0**

Figure 10.

Employment by Historical Territory.

Percentages · 2017.

Sector	Álava		Gipuzkoa		Bizkaia		Total	
	Freq.	%	Freq.	%	Freq.	%	Freq.	%
Architecture	57.2	15.9	74.5	20.7	229.1	63.5	**360.8**	**100.0**
Design	19.2	8.2	75.9	32.5	138.8	59.3	**233.9**	**100.0**
Language Industries	106.0	9.2	466.9	40.6	575.7	50.1	**1,148.6**	**100.0**
Fashion	17.0	4.6	178.1	48.1	175.0	47.3	**370.1**	**100.0**
Advertising	138.2	9.2	365.6	24.3	1,000.8	66.5	**1,504.6**	**100.0**
Video games	11.0	3.9	76.6	27.3	192.7	68.7	**280.3**	**100.0**
Total	**348.6**	**8.9**	**1,237.7**	**31.7**	**2,312.0**	**59.3**	**3,898.3**	**100.0**

3. Dimension and Sustainability

The following figures allow the analysis of the creative industries from another point of view: the industrial dimension of the sector with regard to its volume of business and the employment it generates, analysing its profits.

3.1. Industrial dimension

Below, we show the dimension of the sectors from the point of view of business, taking into account the volume of invoicing of the agents that make up the industrial network of each economic sector. We also measure the volume of employment of each sector calculating the total number of working people equivalent to full-time annualised and the expenditure of staff carried out by agents.

Observing the resulting data, the fashion and advertising sectors stand out for the average of revenue obtained: fashion with 1.3 million euros on average and advertising with 1 million. The average of the total of the creative industries is lower than one million euro.

Figure 11.

Industrial dimension. 2017

Typology	No. of agents	Revenue	
		Freq. (thousands of euros)	Average (thousands of euros)
Architecture	70	32,946.2 €	470.7 €
Design	63	26,474.6 €	420.2 €
Language Industries	70	64,262.7 €	918.0 €
Fashion	43	59,220.2 €	1,377.2 €
Advertising	148	158,506.7 €	1,071.0 €
Video games	25	13,128.5 €	525.1 €
Total	**419**	**354,538.9 €**	**846.2 €**

With regard to employment, although the same sectors still stand out, the differences are not as sharp. When measuring the volume of employment in each sector (through the total number of full-time equivalent annualised people employed and staff expenditure), it can be observed that the sectors that are furthest from the average of the total creative industries are declining. They are those of architecture, design and video games.

Figure 12.

Employment cost. 2017

Typology	No. of people employed	Personnel expenses	
		Freq. (thousands of euros)	Expenditure/people employed (thousands of euros)
Architecture	360,8	10.243,6 €	28,4 €
Design	233,9	6.940,2 €	29,7 €
Language Industries	1.148,6	36.093,8 €	31,4 €
Fashion	370,1	12.504,5 €	33,8 €
Advertising	1.504,6	63.444,6 €	42,2 €
Video games	253,1	7.578,7 €	29,9 €
Total	**3.871,1**	**136.805,4 €**	**35,3 €**

3.2. Sustainability

The sustainability of the creative industries is analysed from the starting point of the financial results obtained by agents. The financial balance of the sectors allows the calculation of the percentage of profits in relation to the total revenue of each sector. In this regard, the sectors with a greater percentage of profits are fashion (28.1%) and architecture (15.5%).

Figure 13.

Business sustainability. 2017

Typology	Benefit	Revenue	
		Freq. (thousands of euros)	% profits over revenue
Architecture	5.110,5	32.946,2	15,5%
Design	2.857,3	26.474,6	10,8%
Language Industries	6.685,8	64.262,7	10,4%
Fashion	16.630,3	59.220,2	28,1%
Advertising	11.443,2	158.506,7	7,2%
Video games	228,3	13.128,5	1,7%
Total	**42.955,3**	**354.538,9**	**12,1%**

4. Asymmetries and Profiles of the Sectors

4.1. Asymmetries

As carried out in the Statistics of Arts and Cultural Industries, beyond the overall data of the sectors and their different typologies of agents which allow an approach to the cultural reality, an attempt is made to look at different nuances to obtain a wider gaze at the reality of sectors. In this regard, a purposeful application of the 80-20 rule has been maintained in the Statistics of Creative Industries, causing existing asymmetries to arise in the fields under study.

Thus, in this section, the effect on the whole of each sector of the 20% of agents with the greatest revenues is analysed. By doing this, two aspects are covered: the portrait of the agents with greater revenues, and, at the same time, the volume of business and employment corresponding to the majority of agents of each sector.

A global look at asymmetries and the degrees of revenue concentration of the different sectors allows us to see that, in practically all of them, the 20% of agents with the greatest revenues accrue between 7 and 9 out of each 10 euros of the whole revenue (except Architecture, which accrues 56.5% and video games, with 66.6%).

With regard to employment, the differences between sectors are more noticeable: in three of the sectors, 20% of the agents with greatest volume of revenue occupy between 6 and 8 of every 10 workers (language industries, 80.6%; fashion 67.5%; and advertising, 60.3%). The video games sector and the design sector, between 4 and 5 of every 10 people employed (49.4% and 41.5%, respectively). And finally, the architecture sector presents lesser asymmetry, because 20% of the agents with greater revenue occupy 26.5% of people employed. As can be seen, more revenue does not mean more jobs in this last case.

In this regard, stand-out asymmetries are observed in all sectors among agents who accrue the greatest volume of revenue and the rest, especially when it comes to sharing out economic activity.

Figure 14.

League table of agent typology by degree of concentration of revenue of the 20% of agents with the greatest revenue.

Percentage · 2017

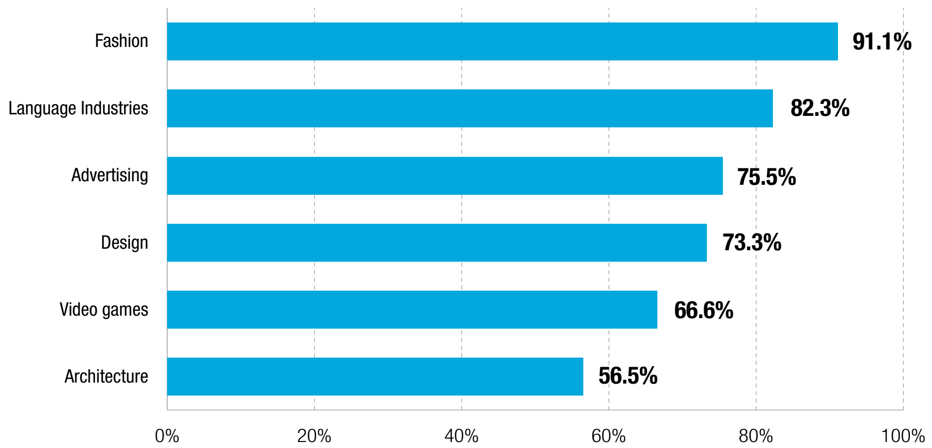
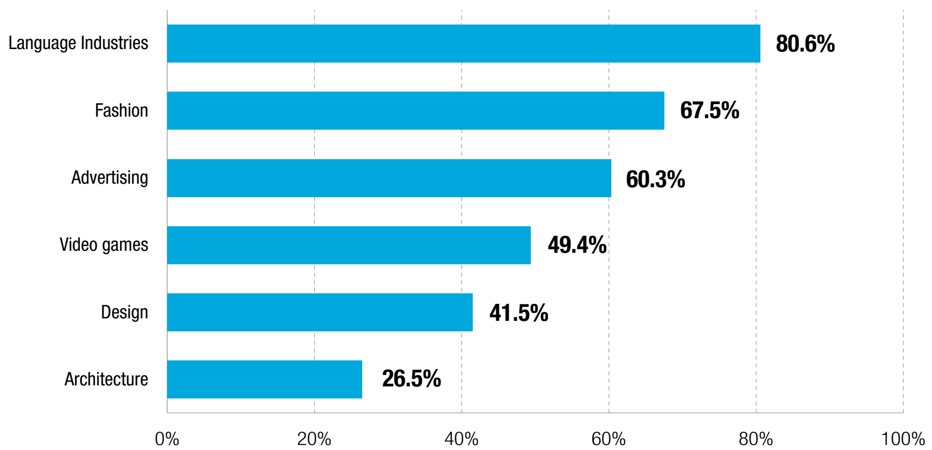


Figure 15.

League table of agent typology by degree of concentration of employment of the 20% of agents with the greatest revenue.

Percentage · 2017



4.2. Agent profiles

The chapters of this report open the possibility of carrying out different levels of analysis of the creative industries. The aim of this section is to show the different profiles of agents, sorting them into segments according to their level of revenue. The analysis of each creative sector includes a first part focussing on territorial distribution, a second part including a gaze at the financial segmentation mentioned above, and a third part focussing on the analysis of sectors according to the size of the companies measured in people employed.

4.2.1. Architecture

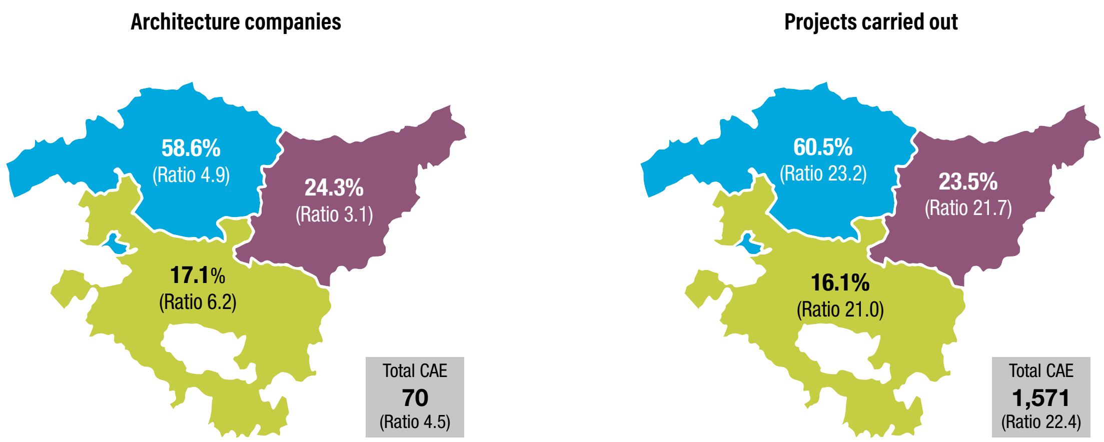
The architecture sector comprises 70 companies. Observing the territorial distribution of the sector, we can see that Bizkaia is the historical territory where it is mostly concentrated (58.6%). However, if we analyse the ratio of agents of the sector per 100,000 inhabitants, although Bizkaia is above the average in the CAE (4.5), Álava stands out with a higher ratio (6.2). Gipuzkoa, however, has a lower-than-average ratio (3.1).

Architecture companies' activity remains in harmony with its territorial distribution; Bizkaia accrues a greater volume of projects (60.5%). If we analyse the average of projects per agent in each territory, we can see that Bizkaia is above the average of the CAE, and unlike the ratio of agents, Álava stays below, as does Gipuzkoa.

Figure 16.

Architecture companies and activity by Historical Territory.

Percentage over total, ratio of agents per 100,000 inhabitants and ratio of activity by company 2017



If we analyse the data according to the financial profile of the companies, those whose revenue is between 100,000 and 500,000 euro dominate, representing 60.0% of the sector agents. The volume of employment is kept fairly balanced with regard to the distribution of agents. Difference appear in the volume of revenue: companies with revenue greater than 500,000 euros (27.1%) generate 65.2% of the sector's overall revenue.

Figure 17.

Architecture companies according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than €1,000,000	5	7.1	31.3	16.1	11.6
From €500,001 to €1,000,000	14	20.0	33.9	16.8	4.3
From €100,000 to €500,000	42	60.0	33.3	59.4	5.1
Below 100,000	9	12.9	1.5	7.7	3.1
Total	**70**	**100.0**	**100.0**	**100.0**	**5.2**

Finally, it is worthy of mention that the architecture companies analysed are basically micro-enterprises, agents with fewer than 10 people on the payroll (90.0% of the sector).

Figure 18.

Architecture companies according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	63	90.0
Small business: 10-49 employees	7	10.0
Medium/large company: more than 50 employees	0	0.0
Total	**70**	**100.0**

4.2.2. Design

If we focus our gaze in the design sector, comprising 63 agents, its unequal territorial distribution is visible; the majority is concentrated in Bizkaia (61.9%), whose ratio per 100,000 inhabitant (4.7) exceeds the average of the CAE (4.0).

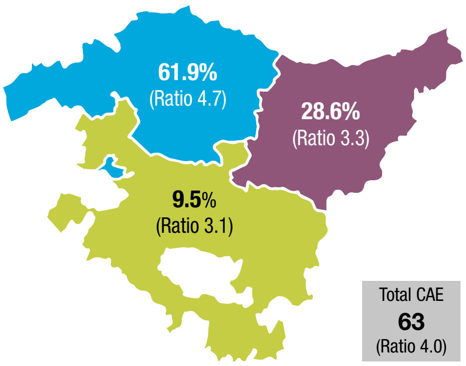
With regard to activity, distribution follows the same dynamic. In Bizkaia, 62.2% of the total of projects are carried out, in Gipuzkoa, 30.2% and in Álava, 7.6%.

Figure 19.

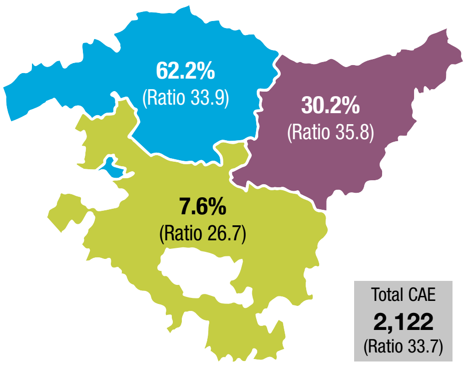
Design companies, design and manufacture and activity by Historical Territory.

Percentage over total, ratio of agents per 100,000 inhabitants and ratio of activity by company. 2017

Design companies



Projects



The segmentation of the design sector according to revenue makes it obvious that companies whose revenue is greater than 1 million euros represent 15.9% of the sector and accrue more than 60.0% of the total revenue of the same. With regard to employment, they concentrate 33.1% of people employed in design. It is also worth pointing out that 77.8% of agents are companies whose revenue is less than 500,000 euros and occupy 56.4% of the design sector.

Figure 20.

Design companies according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than € 1,000,000	10	15.9	65.8	33.1	7.8
From € 500,001 to € 1,000,000	4	6.3	9.5	10.5	6.1
From € 100,000 to € 500,000	24	38.1	20.3	41.2	4.0
Below 100,000	25	39.7	4.4	15.2	1.4
Total	**63**	**100.0**	**100.0**	**100.0**	**3.7**

As for the size of companies devoted to design, the dominance of micro-enterprises (93.7%) is the rule in the sector.

Figure 22.

Design companies according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	59	93.7
Small business: 10-49 employees	4	6.3
Medium/large company: more than 50 employees	0	0.0
Total	**63**	**100.0**

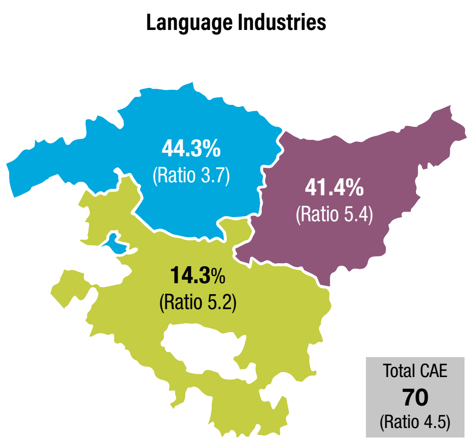
4.2.3. Language Industries

Language industries comprise 70 agents distributed mainly in Bizkaia (44.3%) and Gipuzkoa (41.4%). However, the ratio of companies per 100,000 inhabitants is much greater in Gipuzkoa, 5.4 companies for every 100,000 inhabitants, which places it above the CAE average (4.5).

Figure 24.

Language industries and activity by Historical Territory.

Percentage over total and ratio of agents per 100,000 inhabitants. 2017



If we focus our gaze on the financial profile of language industries we observe that 71.4% of the sector's agents have revenue lower than 500,000 euro, accruing 11.6% of the total revenue. This fact ties in with the data if we analyse the agents by size of company, where micro-enterprises dominate, those which occupy fewer than 10 people employed (75.7%). But it is worth highlighting that they are those companies whose revenue is more than 1 million euros that concentrate 80.8% of sector revenue and at the same time 80,1% of the volume of employment.

Figure 25.

Language industries according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than € 1,000,000	13	18.6	80.8	80.1	70.7
From € 500,001 to € 1,000,000	7	10.0	7.6	8.6	14.1
From € 100,000 to € 500,000	24	34.3	9.5	7.5	3.6
Below 100,000	26	37.1	2.1	3.9	1.7
Total	**70**	**100.0**	**100.0**	**100.0**	**16.4**

Figure 26.

Language industries according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	53	75,7
Small business: 10-49 employees	12	17,1
Medium/large company: more than 50 employees	5	7,1
Total	**70**	**100,0**

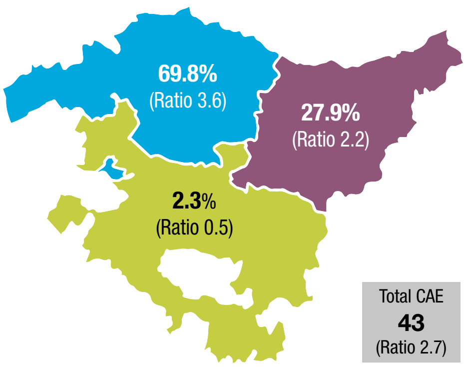
4.2.4. Fashion

The fashion sector comprises 43 agents concentrated mainly in Bizkaia (69.8%). Although Gipuzkoa presents a lesser weight of agents, the ratio of companies per 100,000 inhabitants is just a few tenths below the CAE average (2.2 companies per inhabitant in Gipuzkoa and 2.7 in the CAE).

Figure 27.

Fashion companies and activity by Historical Territory.
Percentage over total and ratio of agents per 100,000 inhabitants 2017

Fashion companies



With regard to the profile of these companies, those with revenues of less than 100,000 euro stand out, representing more than half of the sector. Although they only accrue 2.2% of the total revenue, they occupy 14.4% of the people employed. Practically the totality of revenue (91.1%) and more than half of employment (67.5%) are concentrated in 9 companies whose revenue is more than 1 million euro and who make up 20.9% of the sector.

And finally, if the analysis is carried out by size of company according to the employment they generate, micro-enterprises stand out, with 72.1% of the agents.

Figure 28.

Fashion companies according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than €1,000,000	9	20.9	91.1	67.5	27.8
From €100,000 to €1,000,000	10	23.3	6.6	18.1	6.7
Below 100,000	24	55.8	2.2	14.4	2.2
Total	**43**	**100.0**	**100.0**	**100.0**	**8.6**

Figure 29.

Fashion companies according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	31	72.1
Small and medium-sized business: 10 or more jobs	12	28.9
Total	**43**	**100.0**

4.2.5. Advertising

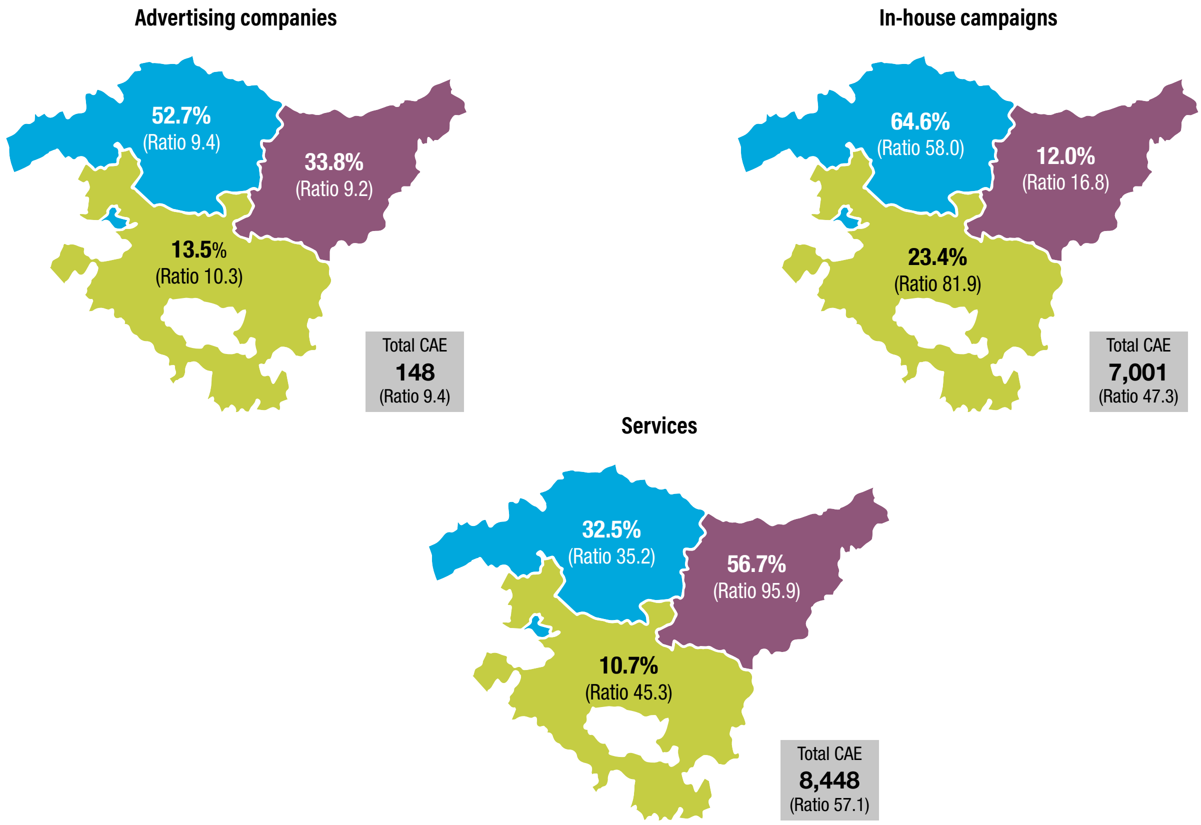
The Creative Industries sector with the greatest volume of agents is advertising. 148 advertising companies with the greatest presence in Bizkaia, 52.7%, but which maintain a fairly balanced ratio per 100,000 inhabitants.

With regard to activity, nuances can be observed. In this regard, the campaigns themselves present different trends to the services carried out by the companies. The campaign themselves present a greater weight in Bizkaia (64.6%). However, the number of campaigns carried out per company is much higher in Álava and falls with regard to the average in Gipuzkoa. The services present very different results, given that the majority are carried out in Gipuzkoa (56.7%) and Bizkaia is the territory below the CAE average of services carried out per company.

Figure 30.

Advertising companies and activity by Historical Territory.

Percentage over total, ratio of agents per 100,000 inhabitants and ratio of activity by company 2017



With regard to the profile of companies, it can be observed that more that 60.0% of companies have a revenue of less that 500,000 euro, but those with more than 1 million euro accrue more than 70.0% of revenue and 60.0% of employment. In this regard, the average of working people in this area stands out, which is well above the sector average. The companies whose revenue is more than 1 million euro have on average 31.4 people employed, while the sector average in 10.2 people employed per company.

Figure 31.

Advertising companies according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than € 1,000,000	28	18.9	74.2	58.8	31.4
From € 500,001 to € 1,000,000	28	18.9	12.8	17.6	9.5
From € 100,000 to € 500,000	71	48.0	12.2	20.7	4.4
Below 100,000	21	14.2	0.8	3.2	2.3
Total	**148**	**100.0**	**100.0**	**100.0**	**10.2**

By analysing the advertising sector taking into account the size of the company, we can see that micro-enterprises stand out, those which do not occupy more than 10 people employed (75.7%).

Figure 32.

Advertising companies according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	112	75.7
Small and medium-sized business: 10 or more jobs	36	24.4
Total	**148**	**100.0**

4.2.6. Video games

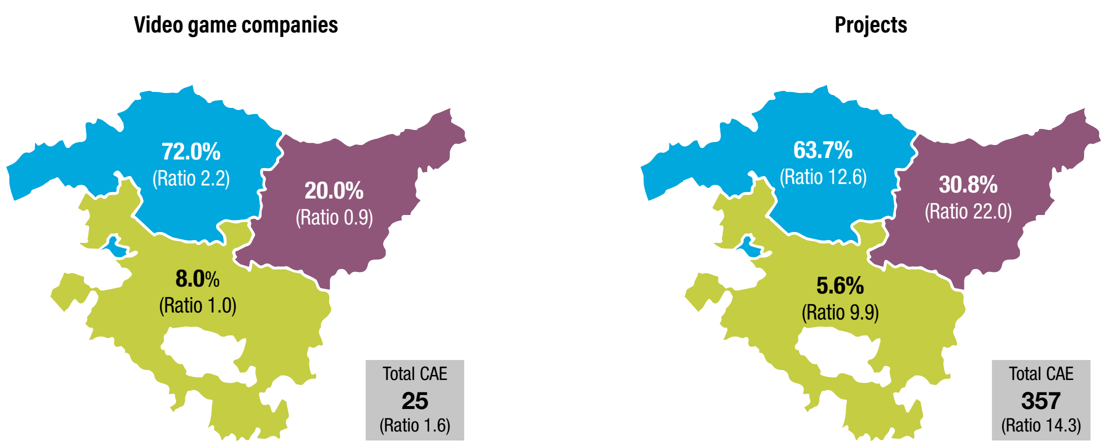
The video games sector is made up of 25 agents, of whom 72.0% are located in Bizkaia, 20.0% in Gipuzkoa, and 8.0% in Álava. Upon analysing the distribution of agents in the territory, we can see that for each 100,000 inhabitants of the CAE, there are 1.6 agents; in the territories of Álava and Gipuzkoa, the ratios per 100,000 inhabitants is below average (1.0 and 0.9, respectively) and in the case of Bizkaia, above average (2.2).

The sector's volume of activity is distributed slightly differently to the territorial distribution. In Gipuzkoa, 30.8% of the sector's activity is concentrated and the average of projects carried out per company is above the total average of the CAE. In Bizkaia, as in the case of agent volume, the greater percentage of activity is concentrated (63.7%), but the ratio of projects per agent is lower than the average of the CAE.

Figure 33.

Video game companies and activity by Historical Territory.

Percentage over total, ratio of agents per 100,000 inhabitants and ratio of activity by company. 2017



72.0% of video game agents obtain revenue lower than 500,000 euro. However, 75.0% of the revenue is concentrated in those companies which accrue revenue higher than 500,000 euro (and account for 28.0% of agents). These agents also accrue the greatest percentage of employment, 57.6%; the average of people employed per company is 20.8, much higher than the sector average (10.1).

Figure 34.

Video game companies according to revenue. 2017

	Agents		Revenue	Working people equivalent to full-time annualised	
	Freq.	%	%	%	Average
More than € 500,000	7	28.0	75.0	57.6	20.8
From € 100,000 to € 500,000	10	40.0	22.6	33.7	8.5
Below 100,000	8	32.0	2.3	8.7	2.7
Total	**25**	**100.0**	**100.0**	**100.0**	**10.1**

In relation to the size of the companies according to employment, it is the smallest which stand out. 64.0% are micro-enterprises and the remaining 36.0% are small companies, of between 10 and 49 jobs.

Figure 35.

Video game companies according to the number of working people equivalent to full-time annualised. 2017

	Freq.	%
Micro-enterprises: fewer than 10 jobs	16	64.0
Small business: 10 -49 employees	9	36.0
Medium/large company: more than 50 employees	0	0.0
Total	**25**	**100.0**

5. Internationalisation

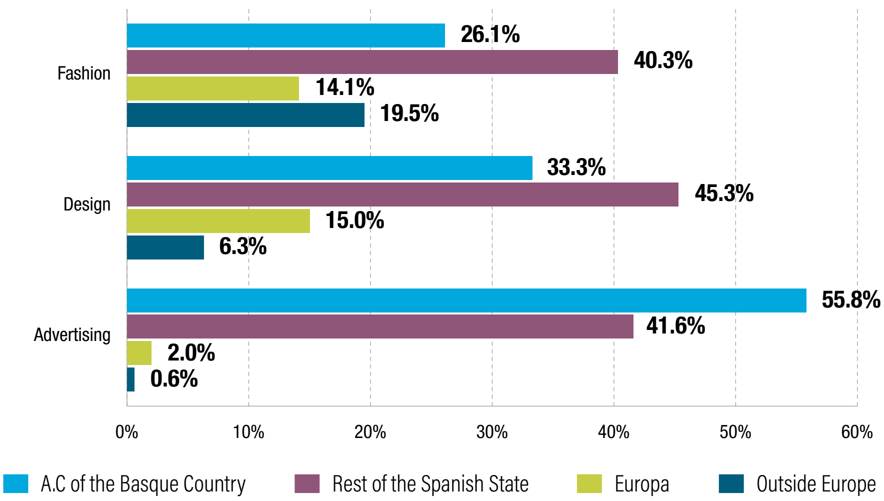
This chapter aims to analyse the capacity for internationalisation of the creative industries. The data show trends in internationalisation of design, fashion and advertising. The main market in the three cases is the rest of the Spanish state (around 40-45% of their invoicing).

The design sector is that with the greatest weight in its invoicing of foreign markets. Of the total of its invoicing, 19.5% is concentrated in countries outside Europe and 14.1% in European markets. Its invoicing in the Autonomous Community of the Basque Country amounts to 26% of the total.

In the case of fashion, the percentage of the European and rest of the world markets is less, around 20.0%, and in the advertising sector, the main market is domestic (55.8% of invoicing pertains to the market of the Autonomous Community of the Basque Country).

Figure 37.

Advertising companies' invoicing according to market. 2017

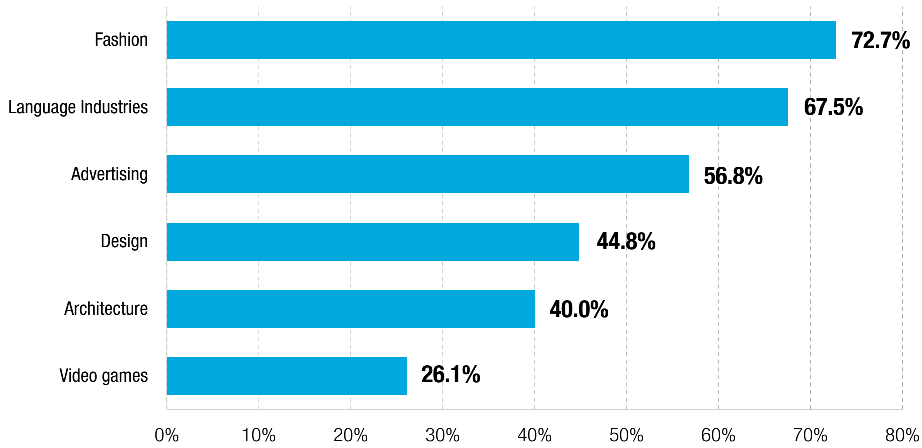


6. Gender

The presence of women in the overall employment of the creative industries is inconsistent depending on the sector. Fashion, language industries and advertising are the sectors accruing a presence higher than 50%. Fashion and the language industries stand out, sectors in which around 7 out of each 10 people employed are women. In the remaining sectors, there is a female presence of less than 50%, with video games being the lowest, in which less that 3 out of every 10 posts are occupied by women.

Figure 38.

Women workers by sector in the creative industries. Percentage · 2017



If we analyse the data of workers by sector according to the professional function they fulfil, management and administration posts stand out (women account for between 6 and 7 out of every 10 people employed in all sectors). However, in directorship posts, in the great majority of sectors, men dominate, with the architecture sector standing out, in which only 1.5 women out of every 10 people employed occupy directorship posts. In the case of fashion, language industries or advertising, women have a greater presence in these posts (more than 50% are occupied by women). And in technical and creative posts, more than half in practically all sectors ate occupied by men, except fashion and the language industries (where the presence of women is 77.8% and 69.0%, respectively).

From a global perspective, the sector with least female presence is the video games sector.

Figure 39.

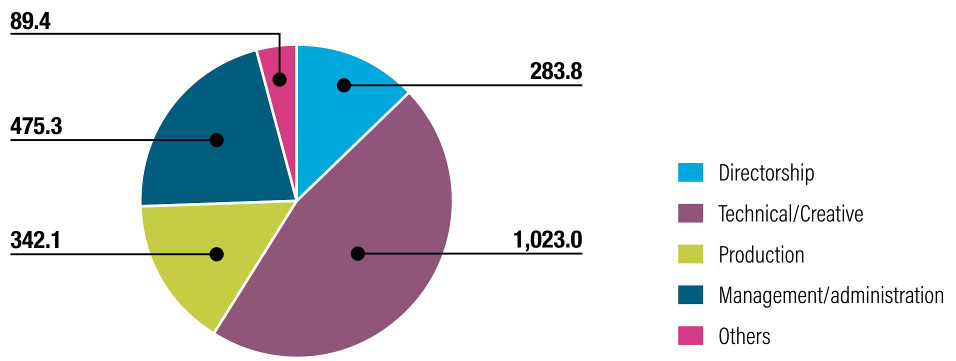
Women workers by sector in the creative industries and professional function. Percentage · 2017

	Directorship	Technical/ Creative	Production	Management/ Admin.	Others	Total
Architecture	15.0	41.0		74.9	25.0	40.0
Design	38.8	44.2	42.7	69.1	39.2	44.8
Language Industries	58.7	69.0		69.0	55.5	67.5
Fashion	65.8	77.8	75.8	68.8	77.0	72.7
Advertising	51.3	48.9	60.9	67.2	45.3	56.8
Video games	27.8	17.8		68.3	28.2	26.1

Finally, observing the distribution of the total number of women workers by professional function, the technical and creative profiles stand out, and those related with management and administration.

Figure 40.

Distribution of women workers by professional function. Absolutes · 2017



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