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Colección de Estadística y Estudios del Observatorio Vasco de la Cultura

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an analytical reading of the data of the statistics for the Creative Industries

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contents

1. Methodological Introduction

This report contains a global vision of the Statistics of *Creative Industries 2019* results. It is a biennial operation which shares objectives and methodology with the *Statistics of the Arts and Cultural Industries*. 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 2019 edition, the second in the series, data provided by 354 agents from the fashion, design, architecture, language industries, advertising and video game sectors have been analysed. The field work took place in 2020, during the pandemic, but the results presented are prior to the COVID-19 crisis. Because the operation takes place every two years, in odd-numbered years, it should be noted that it will be a useful tool to analyse the impact of the pandemic on the creative sectors.

The first chapter is devoted to presenting the big hitters of these sectors: the map of agents that make up the Creative Industries of the CAE, the jobs they generate and where they are located. After this overview, analyses focused on its industrial dimension and its sustainability are carried out; on its internal asymmetries and its sectoral profiles; on its internationalisation and, finally, on the distribution of its jobs from the gender perspective.

1.1. Technical sheet

Naming of the operation

Statistics of the Creative Industry in the CAE

Operation status

Formalised by the Eustat

Periodicity

Two-yearly

Class of operation

Census operation

Year the information was gathered

2020

Reference year of the information

2019

Company in charge of the field work

Siadeco

Census and response level

354 agents (63 architecture agents, 55 design agents, 61 of the language industry, 33 of the fashion industry, 123 of advertising, 19 of video games). Total level of response of 74.6 %.

- Level of response of Architecture: 76.2 %.
- Level of response of Design: 74.5 %.
- Level of response of Language Industries: 85.2 %.
- Level of response of Fashion: 51.5 %.
- Level of response of Advertising: 72.4 %.
- Level of response of Video Games: 89.5 %.

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

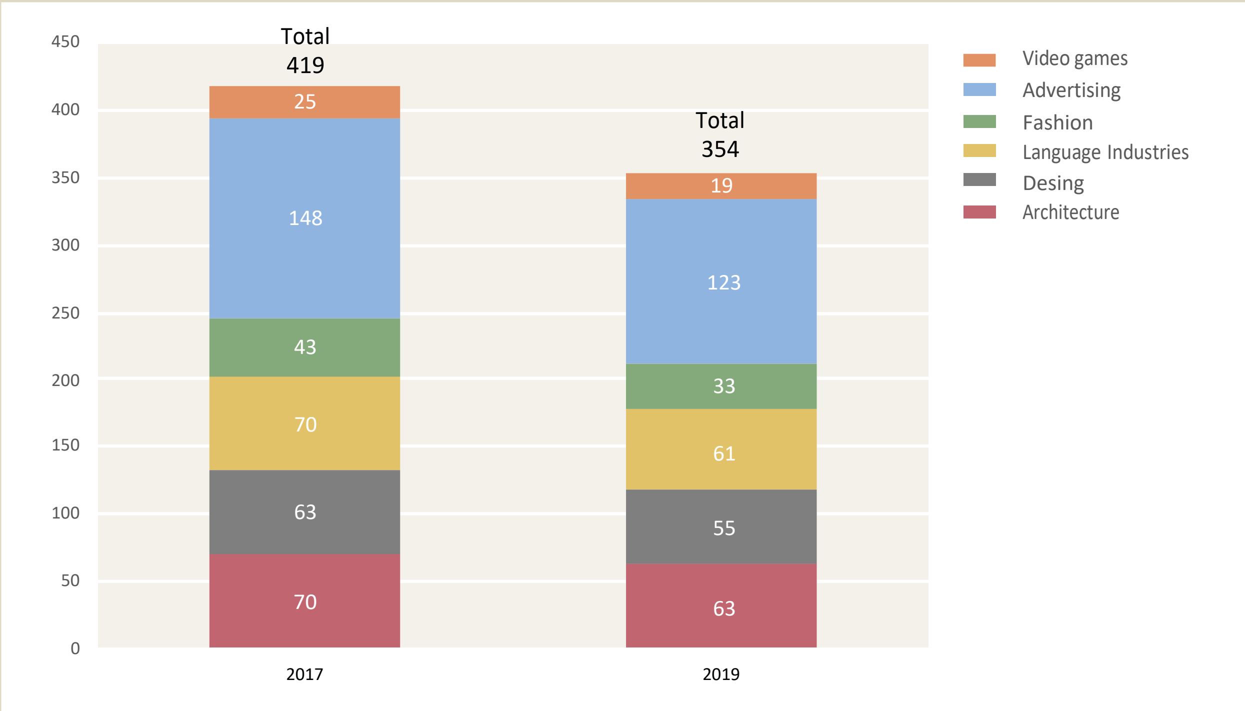
This second edition of the *Statistics of the Creative Industries* gathers information about 354 agents from the CAE which fulfil the requirements demanded to form part of the census. The map of agents forming part of the statistics is made up of:

- The architecture sector, comprising 63 companies.
- The design sector, comprising 55 agents.
- Language industries, comprising 61 agents.
- The fashion sector, comprising 33 companiess.
- The advertising sector, comprising 123 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 19 agents.

As can be observed in the following diagram, the advertising sector has the greatest weight of agents (34.8%), followed by the architecture (17.8%) and language industries (17.2%), design (15.5%), the fashion sector (9.3%) and finally, the video games sector (5.4%).

In relation to 2017, there is a 15.5% decrease in the number of agents who have participated in the statistics, a dynamic present in all sectors, with impacts ranging around 23-24% in video games or fashion, and 10% in architecture. It should be emphasised that this decrease in agents is mainly due to issues inherent to the first editions of the operation, not so much to a dynamic of sectoral contraction. Therefore, it should be noted that the results of this edition give a better reflection of the reality of the Creative Industries than those of the previous edition, always taking into account the requirements that arise from the outset, with a cut-off value of at least three jobs as the main condition to take part in the study.

Figure 1. Agents by sector Absolutes · 2017-2019



In absolute terms, the balance of revenue and expenses of the Creative Industries is positive, with 32 million euros, which is 9.5% of revenue. Analysing them, it can be observed that 40.4% of the total is accrued by the advertising sector. Another sector which stands out for its volume of revenue is the language industries, representing 18.8% of the total of Creative Industries. With regard to expenditure, distribution by sector is similar to revenue.

Figure 2. Total revenue of agents by sector

Millions of euros · 2017-2019

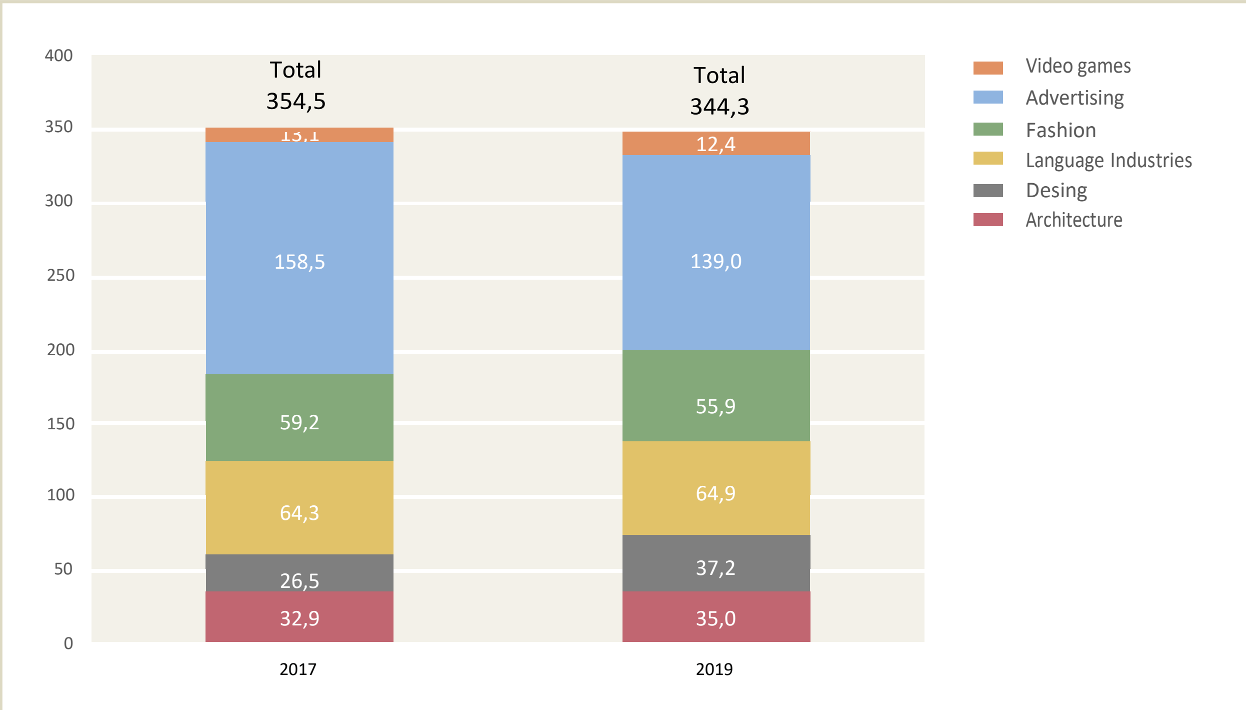


Figure 3. Total expenditure of agents by sector

Millions of euros · 2017-2019

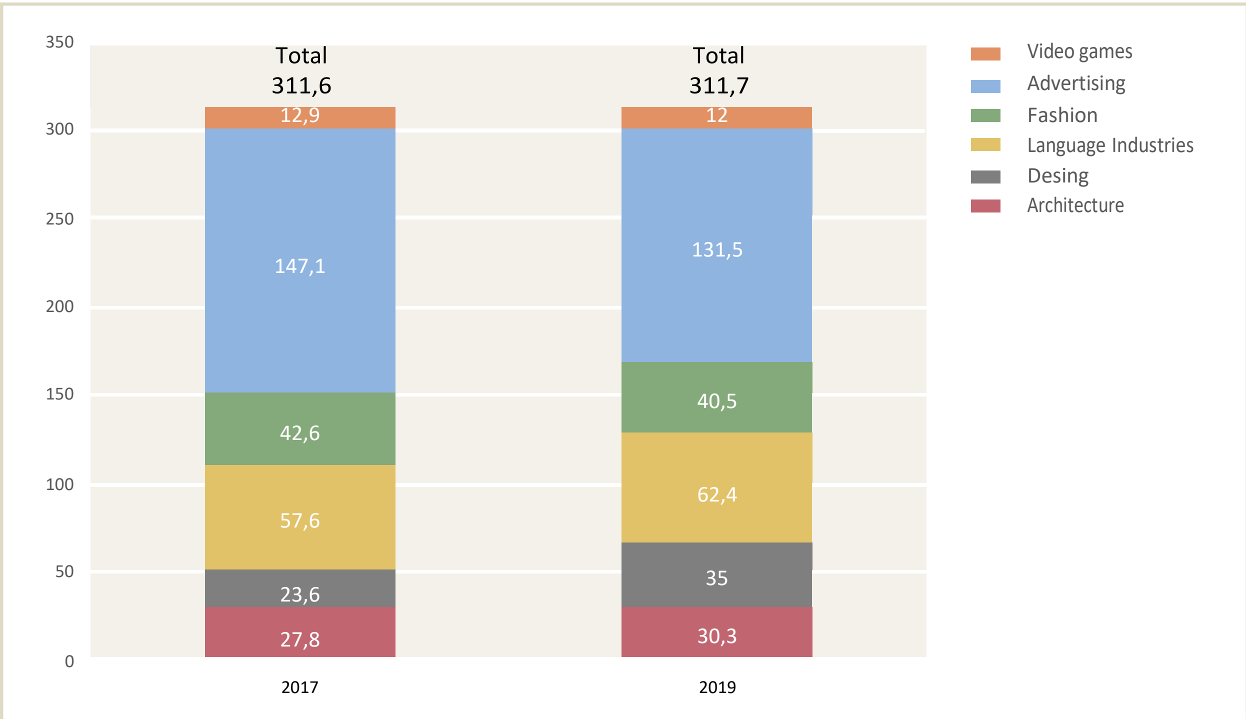


Figure 4. Revenue, expenditure and balance by sector and agent typology 2017-2019

Year	Sector	Revenue	Expenditure	Balance	Percentage of the total revenue
		Thousand euro	Thousand euro	Thousand euro	%
2017	Video games	13.128,5	12.900,2	228,3	1,7 %
	Advertising	158.506,7	147.063,5	11.443,2	7,2 %
	Fashion	59.220,2	42.589,9	16.630,3	28,1 %
	Language Industries	64.262,7	57.576,9	6.685,8	10,4 %
	Design	26.474,6	23.617,3	2.857,3	10,8 %
	Architecture	32.946,2	27.835,7	5.110,5	15,5 %
Total		354.538,9	311.583,5	42.955,3	12,1 %
2019	Video games	12.411,5	12.000,5	411,0	3,3 %
	Advertising	138.961,8	131.468,2	7.493,6	5,4 %
	Fashion	55.932,5	40.478,3	15.454,2	27,6 %
	Language Industries	64.872,5	62.444,7	2.427,9	3,7 %
	Design	37.178,6	35.036,2	2.142,4	5,8 %
	Architecture	34.963,0	30.324,6	4.638,4	13,3 %
Total		344.320,0	311.752,5	32.567,4	9,5 %

The Creative Industries of the CAE employ 3,678.6 people. 64.7% of the weight of employment is distributed in the advertising sector (35.2%) and the language industries (29.5%). The sector accruing least employment in absolute terms is that of video games (7.5%). In any case, the analysis of jobs by company helps to complete the look at the employment dimension of the different sectors: a first level, formed by the language and video game industries that reach around 14-17 jobs per company; a second level formed by advertising and fashion, with 10 jobs per company; and a third level, which includes design and architecture, with companies of around 5-6 workers on average.

Figure 5. Total workers of agents by sector. Workers equivalent to full-time annualised Absolutes · 2017-2019

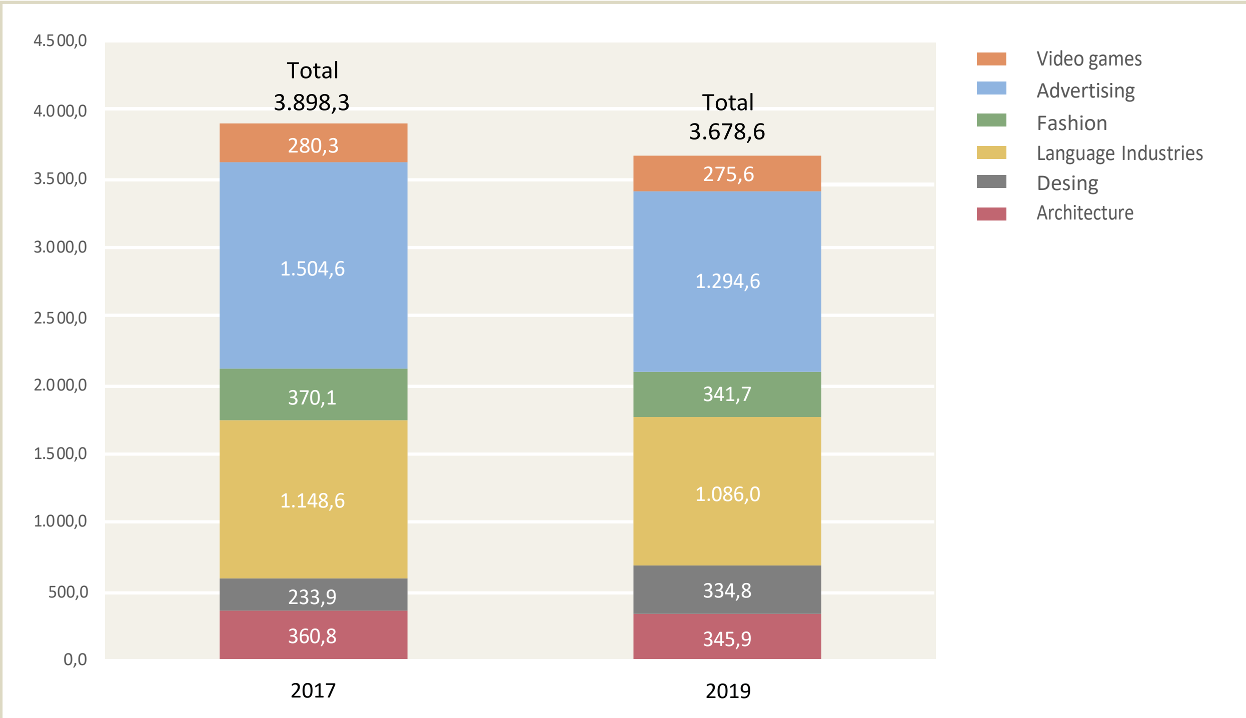


Figure 6. Total people employed of agents by sector and agent typology. Workers equivalent to full-time annualised

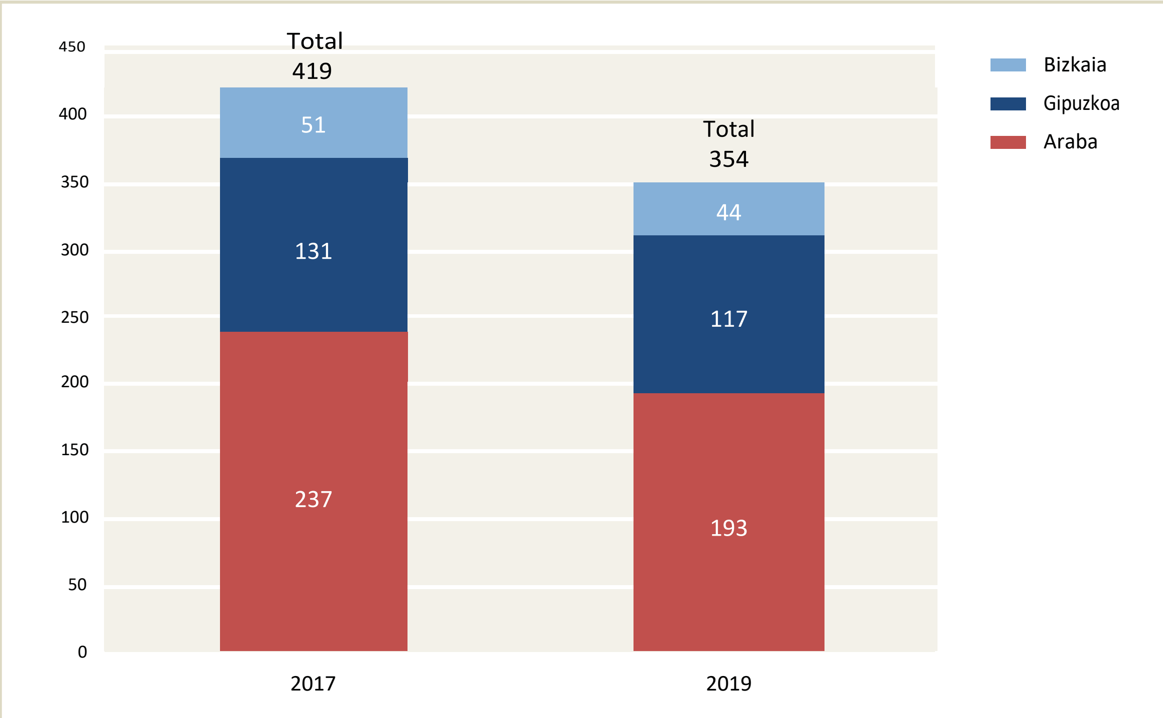
2017-2019

Year	Sector	People employed	Percentage of the total of people employed
2017	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 %
2019	Architecture	345,9	9,4 %
	Design	334,8	9,1%
	Language Industries	1.086,0	29,5 %
	Fashion	341,7	9,3 %
	Advertising	1.294,6	35,2 %
	Video games	275,6	7,5 %
Total		3.678,6	100,0 %

2.2. Territory

The territorial distribution of the Creative Industries of the CAE makes up a map in which Bizkaia concentrates 54.5% of the agents, Gipuzkoa, 33.1% and Araba, 12.4%.

Figure 7. Agents by Historical Territory Absolutes · 2017-2019



If we examine the data in greater detail, we can see the distribution by territory of each sector. This analysis 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 8. Agents by Historical Territory Percentages · 2017-2019

Year	Sector	Araba	Gipuzkoa	Bizkaia
2017	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
2019	Architecture	19,0	23,8	57,1
	Design	9,1	32,7	58,2
	Language Industries	11,5	47,5	41,0
	Fashion	3,0	27,3	69,7
	Advertising	14,6	34,1	51,2
	Video games	5,3	21,1	73,7
Total		12,4	33,1	54,5

In the case of revenue, more than 50% is concentrated in Bizkaia, 34.9% in Gipuzkoa, and 8.2% in Araba. Regarding employment, 57.2% is concentrated in Bizkaia, 33.2% in Gipuzkoa, and 9.6% in Araba.

Figure 9. Revenue of agents by Historical Territory

Millions of euros · 2017-2019

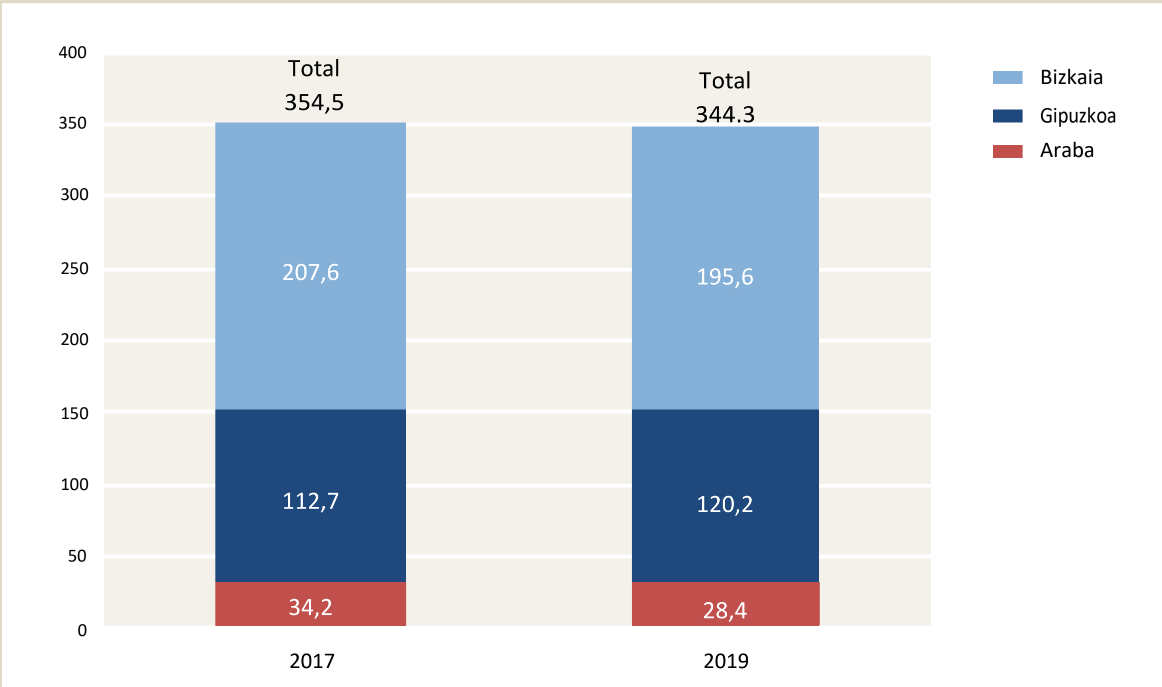


Figure 10. Revenue by Historical Territory

Absolutes (in thousands of euro) · 2017-2019

Year	Sector	Araba		Gipuzkoa		Bizkaia		Total	
		Freq.	%	Freq.	%	Freq.	%	Freq.	%
2017	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
2019	Architecture	2.949,6	8,4	6.107,5	17,5	25.906,0	74,1	34.963,0	100,0
	Design	1.489,9	4,0	19.004,8	51,1	16.683,9	44,9	37.178,6	100,0
	Language Industries	5.621,6	8,7	26.583,9	41,0	32.667,0	50,4	64.872,5	100,0
	Fashion	3.468,6	6,2	27.079,4	48,4	25.384,6	45,4	55.932,5	100,0
	Advertising	14.766,4	10,6	38.844,3	28,0	85.351,0	61,4	138.961,8	100,0
	Video games	139,9	1,1	2.628,0	21,2	9.643,6	77,7	12.411,5	100,0
Total		28.436,0	8,3	120.247,9	34,9	195.636,1	56,8	344.320,0	100,0

The sectors occupying a greater volume of people employed are that of advertising (35.2% of people employed with regard to the total, 1,294.6 in absolute terms) and the language industries (29.5%; 1,086.0 in absolute terms); both occupy more than half of people employed in Bizkaia (38.8% and 26.8%, respectively).

Figure 11. Workers (equivalent to full time annualised) by Historic Territory Absolutes · 2017-2019

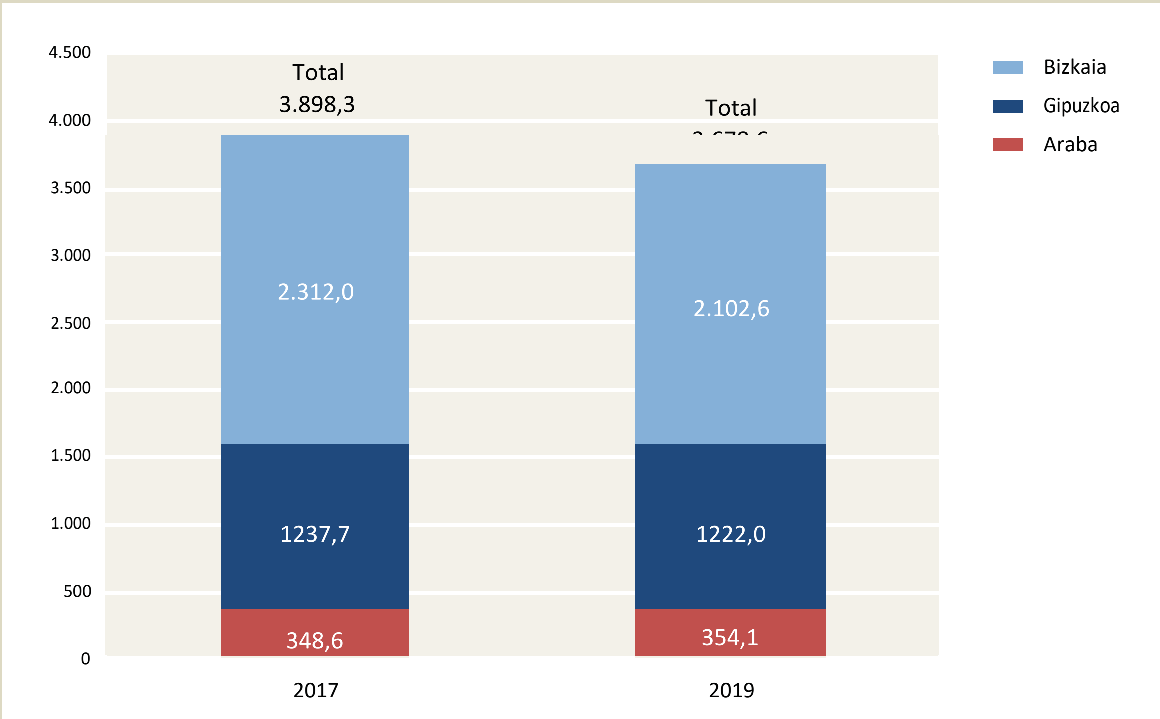


Figure 12. Employment by Historical Territory Percentages · 2017-2019

Year	Sector	Araba		Gipuzkoa		Bizkaia		Total	
		Freq.	%	Freq.	%	Freq.	%	Freq.	%
2017	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
2019	Architecture	56,0	16,2	85,0	24,6	204,9	59,2	345,9	100,0
	Design	18,3	5,5	189,0	56,5	127,5	38,1	334,8	100,0
	Language Industries	99,0	9,1	424,1	39,1	562,8	51,8	1.086,0	100,0
	Fashion	20,2	5,9	131,0	38,3	190,6	55,8	341,7	100,0
	Advertising	157,6	12,2	321,2	24,8	815,8	63,0	1.294,6	100,0
	Video games	3,0	1,1	71,6	26,0	201,0	72,9	275,6	100,0
Total		354,1	9,6	1.222,0	33,2	2.102,6	57,2	3.678,6	100,0

3. Dimension and Sustainability

The following figures allow the analysis of the Creative Industries from different points of view: firstly, the industrial dimension of the sector with regard to its volume of business and the employment it generates; and secondly, its economic sustainability, 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 by calculating the total number of workers equivalent to full-time annualised and the expenditure of staff carried out by agents.

Observing the resulting data, the fashion and advertising sectors and the language industries stand out for the average of revenue obtained: fashion with 1.7 million euros on average, advertising with 1.1 million and the language industries with 1 million. The average of the total of the Creative Industries is lower than one million euro.

Figure 13. Industrial dimension 2017-2019

Year	Typology	Nº. of agents	Revenue	
			Freq. (thousands of euros)	Average (thousands of euros)
2017	Architecture	70,0	32.946,2 €	470,7 €
	Design	63,0	26.474,6 €	420,2 €
	Language Industries	70,0	64.262,7 €	918,0 €
	Fashion	43,0	59.220,2 €	1.377,2 €
	Advertising	148,0	158.506,7 €	1.071,0 €
	Video games	25,0	13.128,5 €	525,1 €
Total		419,0	354.538,9 €	846,2 €
2019	Architecture	63,0	34.963,0 €	555,0 €
	Design	55,0	37.178,6 €	676,0 €
	Language Industries	61,0	64.872,5 €	1.063,5 €
	Fashion	33,0	55.932,5 €	1.694,9 €
	Advertising	123,0	138.961,8 €	1.129,8 €
	Video games	19,0	12.411,5 €	653,2 €
Total		354,0	344.319,9 €	972,7 €

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 fashion, video games and architecture.

Figure 14. Employment cost 2017-2019

Year	Typology	No. of people employed	Staff expenditure	
			Freq. (thousands of euros)	Expenditure/ people employed (thousands of euros)
2017	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 €
2019	Architecture	345,9	11.044,8 €	31,9 €
	Design	334,8	11.934,4 €	35,6 €
	Language Industries	1.086,0	39.727,0 €	36,6 €
	Fashion	341,7	9.725,9 €	28,5 €
	Advertising	1.294,6	51.712,5 €	39,9 €
	Video games	267,6	8.016,3 €	30,0 €
Total		3.670,6	132.160,8 €	36,0 €

3.2. Sustainability

The sustainability of the Creative Industries is obtained 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 greater profitability are fashion (27.6%) and architecture (13.3%).

Figure 15. Business sustainability 2017-2019

Year	Typology	Benefits	Revenue	
			Freq. (thousands of euros)	% profits over revenue
2017	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 %
2019	Architecture	4.638,4	34.963,0 €	13,3 %
	Design	2.142,4	37.178,6 €	5,8 %
	Language Industries	2.427,9	64.872,5 €	3,7 %
	Fashion	15.454,2	55.932,5 €	27,6 %
	Advertising	7.493,6	138.961,8 €	5,4 %
	Video games	411,0	12.411,5 €	3,3 %
Total		32.567,4	344.320,0 €	9,5 %

4. Asymmetries and Profiles of the Sectors

4.1. Asymmetries

Beyond the global data of the sectors, this chapter seeks to touch on different nuances in order to obtain a more refined look at the reality of the sectors. In this regard, a purposeful application of the 80-20 rule has been maintained in the Statistics of Creative Industries, allowing existing asymmetries to arise in the fields under study.

Thus, this section analyses the effect of the 20% of the agents with the highest income in each sector as a whole. 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 8 out of each 10 euros of the whole revenue (except Architecture, which accrues 61.9% and video games, with 66.3%).

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, 81.9%; advertising 63.1%; and design, 61.1%). The video games sector and the architecture sector, between 3 and 4 of every 10 people employed (41.9% and 37.1%, respectively). And finally, the fashion sector presents lesser asymmetry, because 20% of the agents with greater revenue occupy 58.9% of people employed; in this case, more income does not mean more employment.

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 16. League table of agent typology by degree of concentration of revenue of the 20% of agents with the greatest revenue Pourcentage · 2017-2019

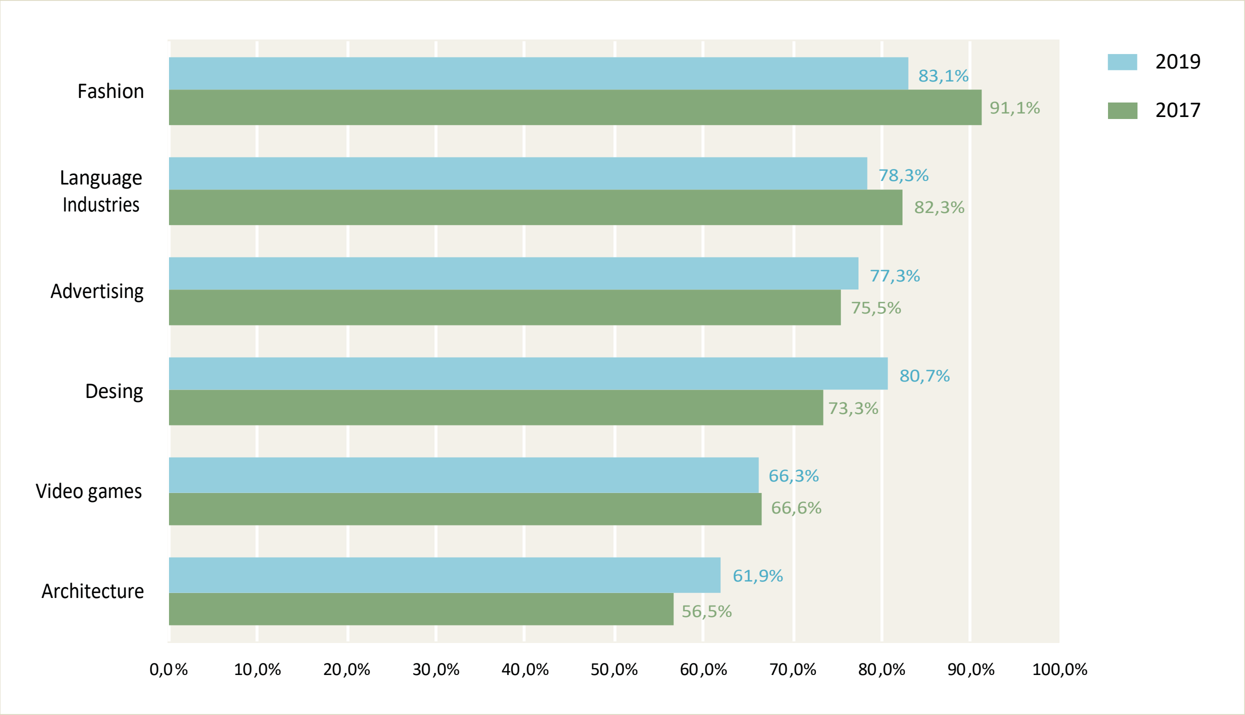
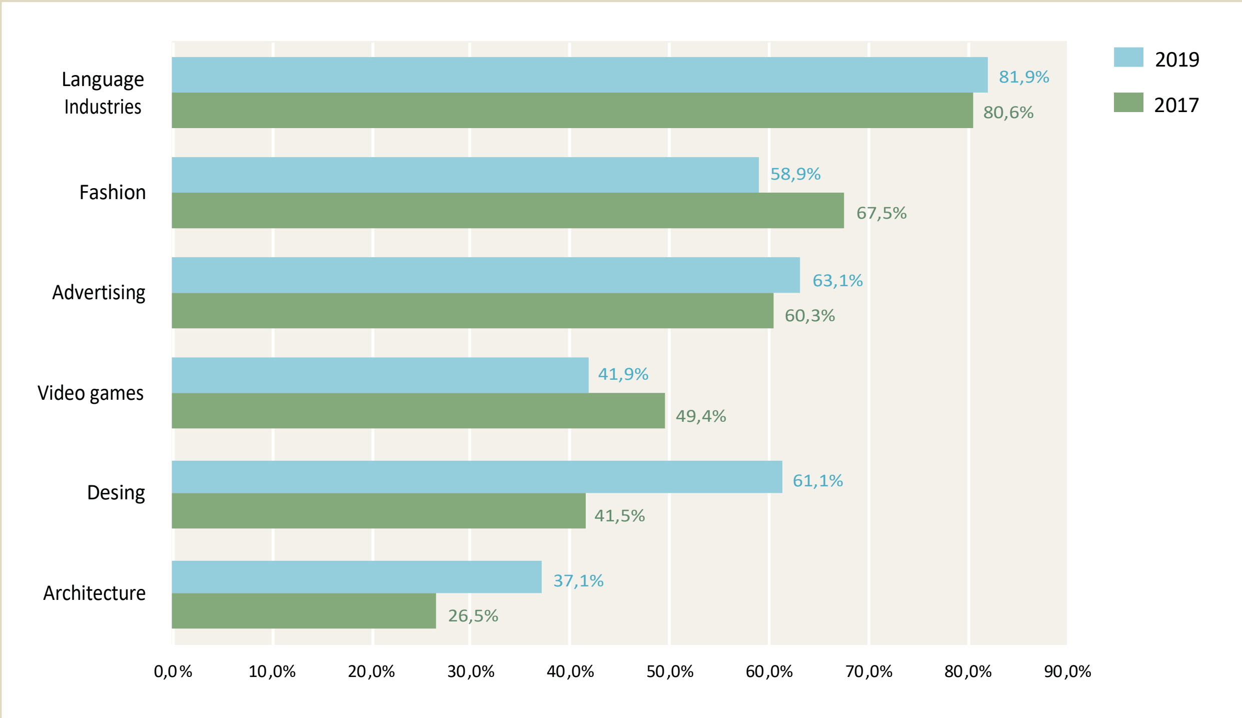


Figure 17. League table of agent typology by degree of concentration of employment of the 20% of agents with the greatest revenue Pourcentage · 2017-2019



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 63 companies. Observing the territorial distribution of the sector, we can see that Bizkaia is the historical territory where it is mostly concentrated (57.1%). However, if we analyse the ratio of agents of the sector per 100,000 inhabitants, although Bizkaia is above the average in the CAE (4.3), Araba stands out with a higher ratio (6.2). Gipuzkoa, however, has a lower-than-average ratio (2.8).

Architecture companies' activity remains in harmony with its territorial distribution; Bizkaia accrues a greater volume of projects (55.0%). If the average number of projects per agent in each territory is analysed, instead of the agent ratio, Gipuzkoa is above the average, and in this case Araba presents the lowest ratio.

Figure 18. Architecture companies by Historical Territory

2017-2019

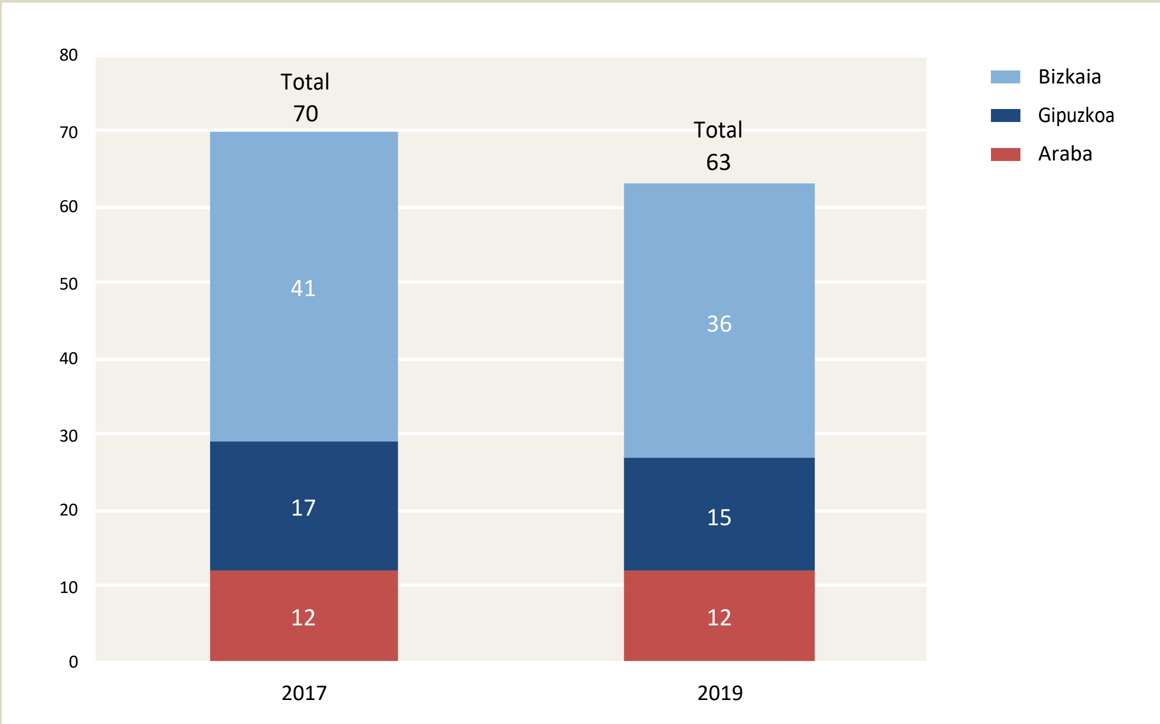
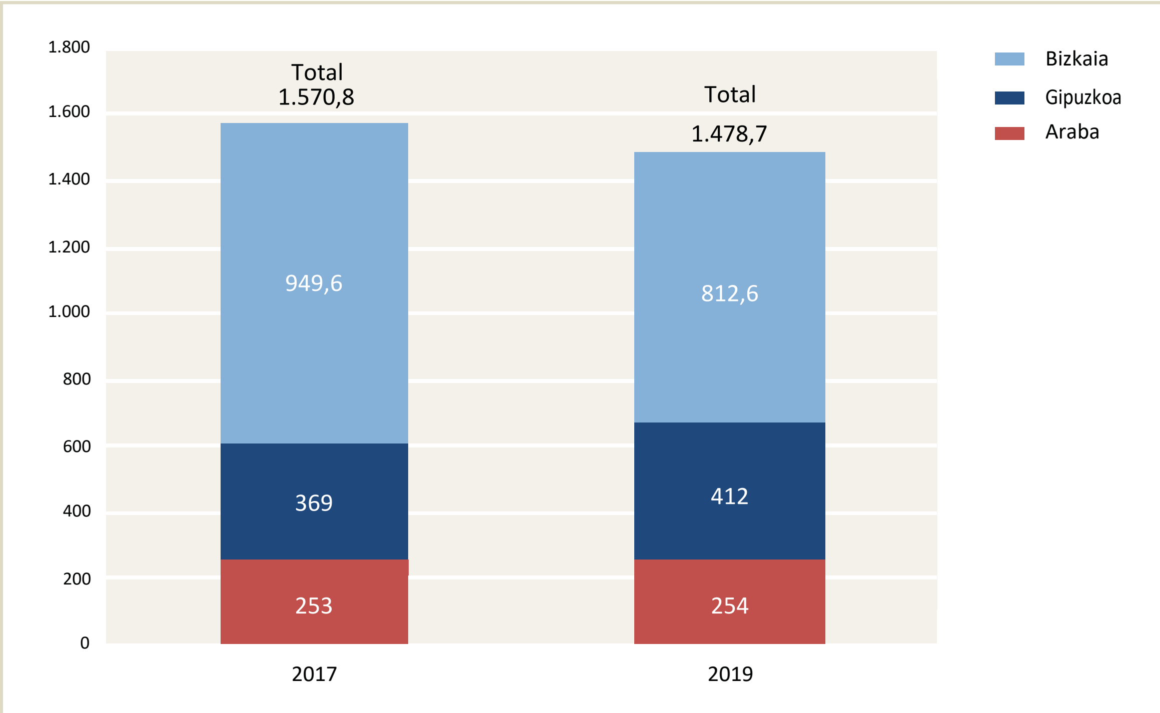


Figure 19. Activity of architecture companies by Historical Territory

2017-2019



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 65.1% 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 (27.0%) generate 68.6% of the sector's overall revenue.

Figure 20. Architecture companies according to revenue 2017-2019

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	More than €1,000,000	5,0	7,1	31,3	16,1	11,6
	From €500,001 to €1,000,000	14,0	20,0	33,9	16,8	4,3
	From €100,000 to €500,000	42,0	60,0	33,3	59,4	5,1
	Less than 100,000	9,0	12,9	1,5	7,7	3,1
Total		70,0	100,0	100,0	100,0	5,2
2019	More than €1,000,000	7,0	11,1	50,1	24,2	12,0
	From €500,001 to €1,000,000	10,0	15,9	18,5	19,7	6,8
	From €100,000 to €500,000	41,0	65,1	30,3	52,8	4,5
	Less than 100,000	5,0	7,9	1,0	3,3	2,3
Total		63,0	100,0	100,0	100,0	5,5

Finally, it is worthy of mention that the architecture companies analysed are basically micro-enterprises, agents with fewer than 10 people on the payroll (87.0% of the sector).

Figure 21. Architecture companies according to the number of workers equivalent to full-time annualised 2017-2019

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	63,0	90,0
	Small business: 10 -49 employees	7,0	10,0
	Medium/large company: more than 50 employees	-	-
Total		70,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	55,0	87,0
	Small business: 10 -49 employees	8,0	13,0
	Medium/large company: more than 50 employees	-	-
Total		63,0	100,0

4.2.2. Design

If we focus on the design sector territorial distribution, comprising 55 agents, it can be seen that they concentrate mainly in Bizkaia (58.2%), whose ratio per 100,000 inhabitants (3.8) exceeds the average of the CAE (3.5).

In relation to the activity, there is an important change with regard to the previous analysis. In Gipuzkoa, 87.0% of the total of projects are carried out, 11.2% and in Bizkaia and 1.8% in Araba.

Figure 22. Design companies by Historical Territory 2017-2019

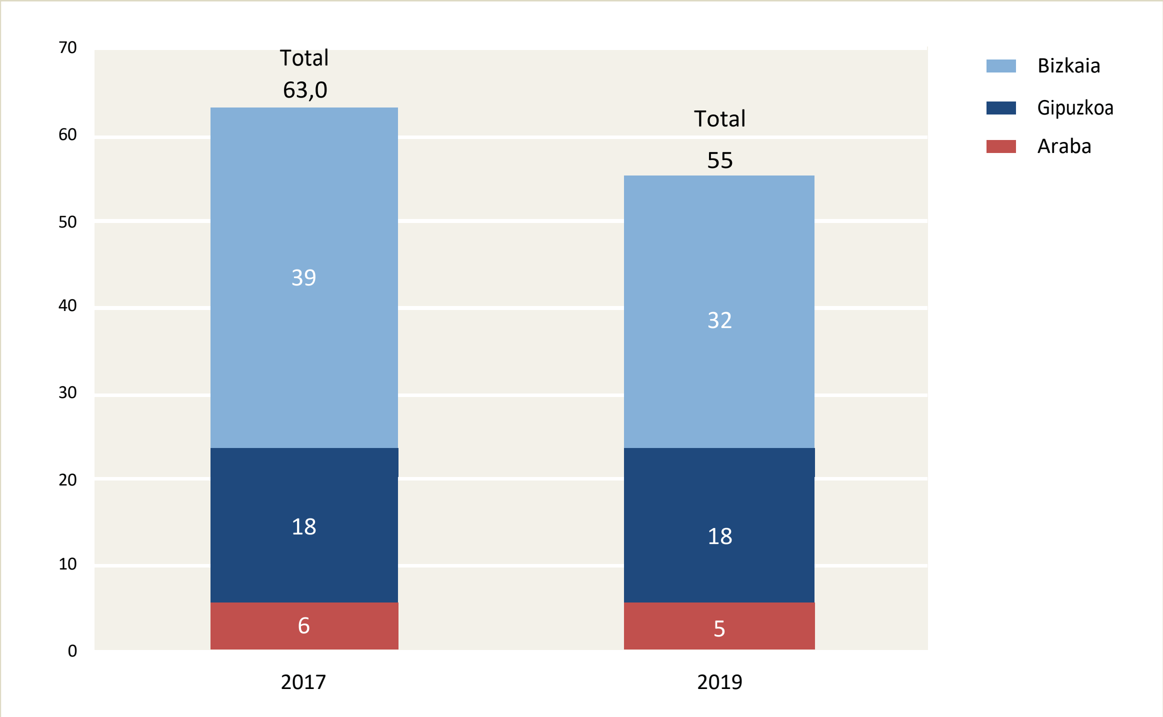
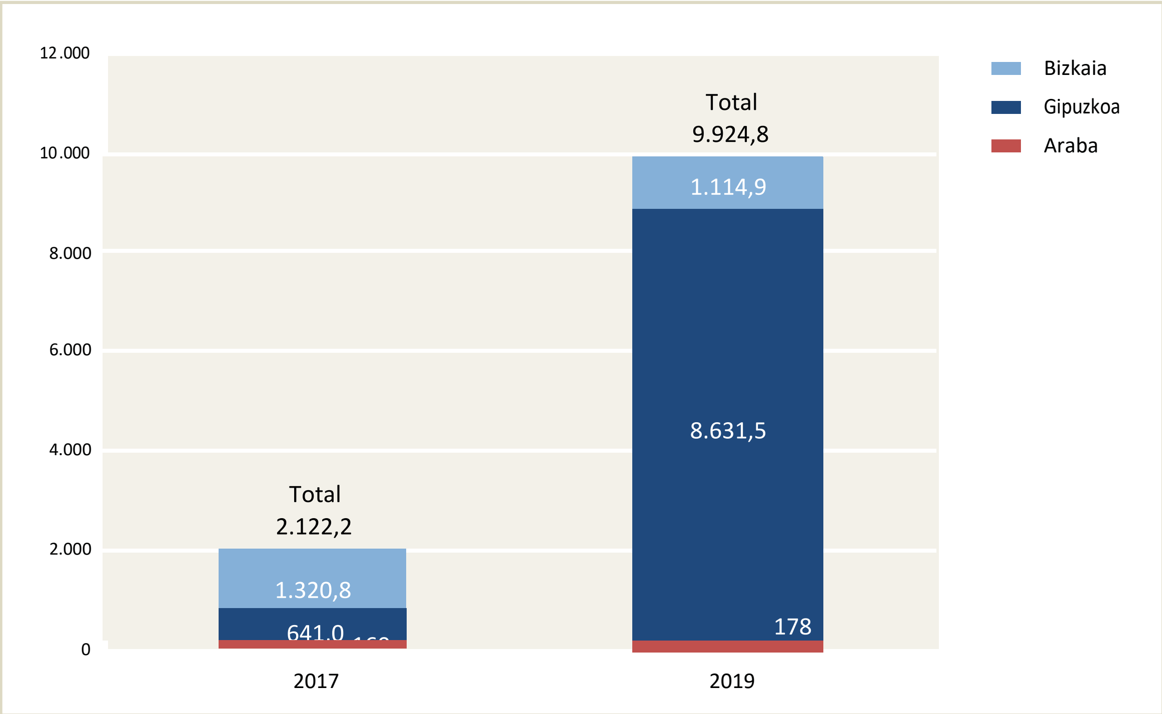


Figure 23. Activity of design companies by Historical Territory

2017-2019



The segmentation of the design sector according to revenue makes it obvious that companies whose revenue is greater than 1 million euros represent 12.7% of the sector and accrue more than 70.0% of the total revenue. With regard to employment, they concentrate 49.0% of people employed in design. It is also worth pointing out that 76.3% of agents are companies whose revenue is less than 500,000 euros and occupy 36.1% of the design sector.

Figure 24. Design companies according to revenue 2017-2019

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	More than €1,000,000	10,0	15,9	65,8	33,1	7,8
	From €500,001 to €1,000,000	4,0	6,3	9,5	10,5	6,1
	From €100,000 to €500,000	24,0	38,1	20,3	41,2	4,0
	Less than 100,000	25,0	39,7	4,4	15,2	1,4
Total		63,0	100,0	100,0	100,0	3,7
2019	More than €1,000,000	7,0	12,7	71,7	49,0	23,4
	From €500,001 to €1,000,000	6,0	10,9	12,2	15,0	8,4
	From €100,000 to €500,000	24,0	43,6	13,6	26,6	3,7
	Less than 100,000	18,0	32,7	2,5	9,5	1,8
Total		55,0	100,0	100,0	100,0	6,1

Regarding their size, it is observed that micro-enterprises (90.9%) are the dominant trend in the sector.

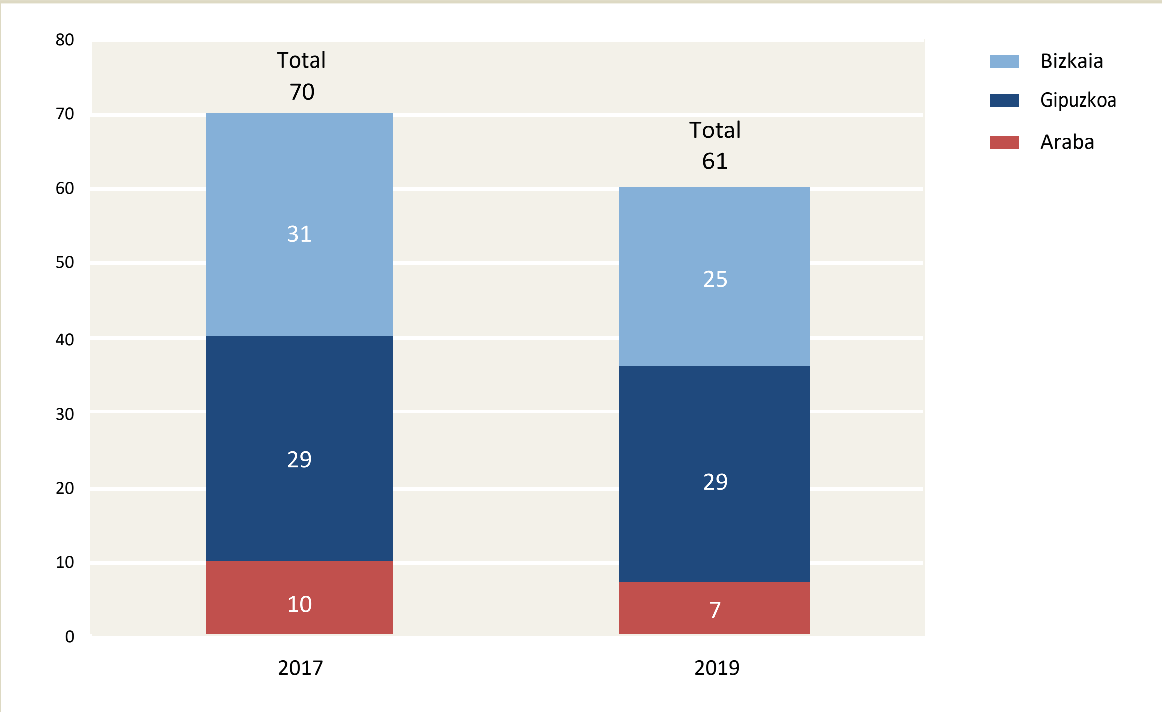
Figure 25. Design companies according to the number of workers equivalent to full-time annualised 2017-2019

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	59,0	93,7
	Small business: 10 -49 employees	4,0	6,3
	Medium/large company: more than 50 employees	-	-
Total		63,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	50,0	90,9
	Small business: 10 -49 employees	4,0	7,3
	Medium/large company: more than 50 employees	1,0	1,8
Total		55,0	100,0

4.2.3. Language Industries

Language industries comprise 61 agents distributed mainly in Gipuzkoa (47.5%) and Bizkaia (40.9%). 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 (3.9).

Figure 26. Language industries by Historical Territory 2017-2019



If we focus our gaze on the financial profile of language industries we observe that 67.2% of the sector's agents have revenue lower than 500,000 euro, accruing 11.8% 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 (75.4%). But it is worth highlighting that those companies whose revenue is more than 1 million euros are the ones that concentrate 81.7% of sector revenue and at the same time 85,3% of the volume of employment.

Figure 27. Language industries according to revenue 2017-2019

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	More than €1,000,000	13,0	18,6	80,8	80,1	70,7
	From €500,001 to €1,000,000	7,0	10,0	7,6	8,6	14,1
	From €100,000 to €500,000	24,0	34,3	9,5	7,5	3,6
	Less than 100,000	26,0	37,1	2,1	3,9	1,7
Total		70,0	100,0	100,0	100,0	16,4
2019	More than €1,000,000	14,0	23,0	81,7	85,3	66,1
	From €500,001 to €1,000,000	6,0	9,8	6,5	4,4	8,0
	From €100,000 to €500,000	26,0	42,6	10,5	8,1	3,4
	Less than 100,000	15,0	24,6	1,3	2,2	1,6
Total		61,0	100,0	100,0	100,0	17,8

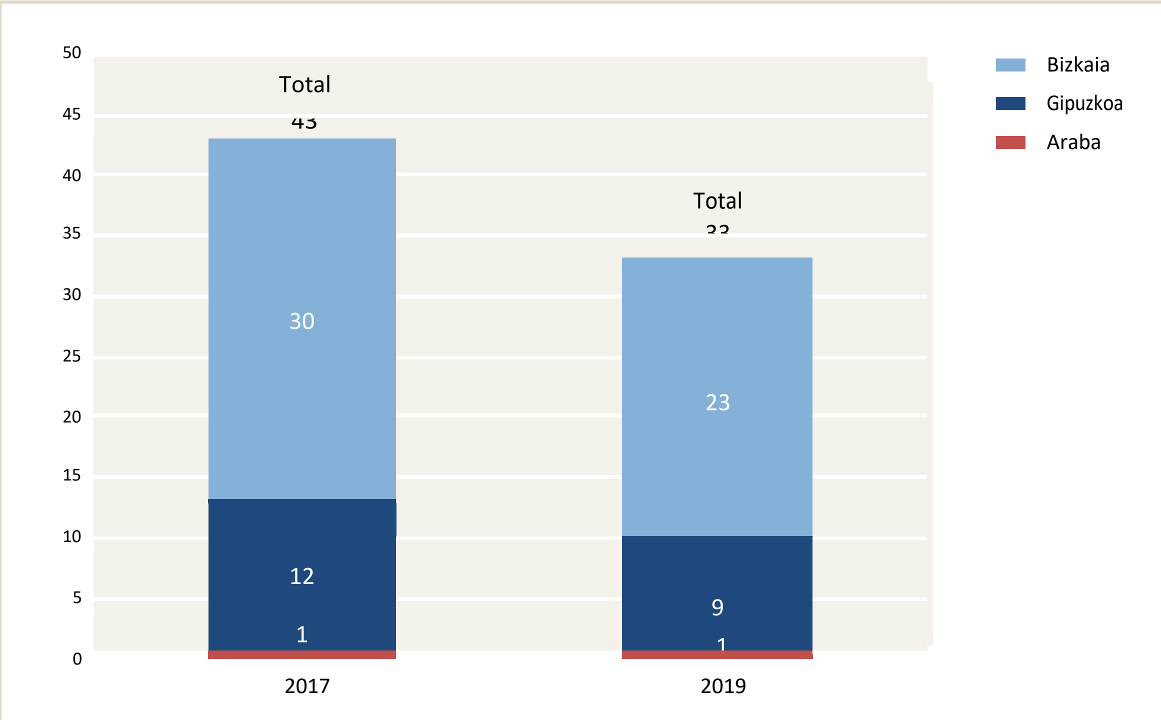
Figure 28. Language industries according to the number of workers equivalent to full-time annualised 2017-2019

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	53,0	75,7
	Small business: 10 -49 employees	12,0	17,1
	Medium/large company: more than 50 employees	5,0	7,1
Total		70,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	46,0	75,4
	Small business: 10 -49 employees	10,0	16,4
	Medium/large company: more than 50 employees	5,0	8,2
Total		61,0	100,0

4.2.4. Fashion

The fashion sector comprises 33 agents concentrated mainly in Bizkaia (69.7%). 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 (1.7 companies per inhabitant in Gipuzkoa and 2.1 in the CAE).

Figure 29. Fashion companies by Historical Territory 2017-2019



With regard to their economic profile, those with revenues of between 100,000 and 1,000,000 euro stand out, representing more than half of the sector. Although they only accrue 8.2% of the total revenue, they occupy 19.4% of the people employed. Practically the totality of revenue (91.3%) and more than half of employment (78.0%) are concentrated in 10 companies whose revenue is more than 1 million euro and who make up 30.3% 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 66.7% of the agents.

Figure 30. Fashion companies according to revenue 2017-2019

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	More than €1,000,000	9,0	20,9	91,1	67,5	27,8
	De 100.000 a 1.000.000 €	10,0	23,3	6,6	18,1	6,7
	Less than 100,000	24,0	55,8	2,2	14,4	2,2
Total		43,0	100,0	100,0	100,0	16,4
2019	More than €1,000,000	10,0	30,3	91,3	78,0	26,6
	De 100.000 a 1.000.000 €	18,0	54,5	8,2	19,4	3,7
	Less than 100,000	5,0	15,2	0,5	2,6	1,8
Total		33,0	100,0	100,0	100,0	10,3

Figure 31. Fashion companies according to the number of workers equivalent to full-time annualised 2017-2019

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	31,0	72,1
	Small business: 10 -49 employees	12,0	28,9
Total		43,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	22,0	66,7
	Small business: 10 -49 employees	10,0	30,3
	Medium/large company: more than 50 employees	1,0	3,0
Total		33,0	100,0

4.2.5. Advertising

The Creative Industries sector with the greatest volume of agents is advertising, with 123 companies distributed in the three territories.

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 (52.3%). However, the number of campaigns carried out per company is much higher in Araba and falls with regard to the average in Gipuzkoa. The services present very different results, given that the majority are carried out in Gipuzkoa (65.8%) and Araba is the territory below the CAE average of services carried out per company.

Figure 32. **Advertising companies by Historical Territory** 2017-2019

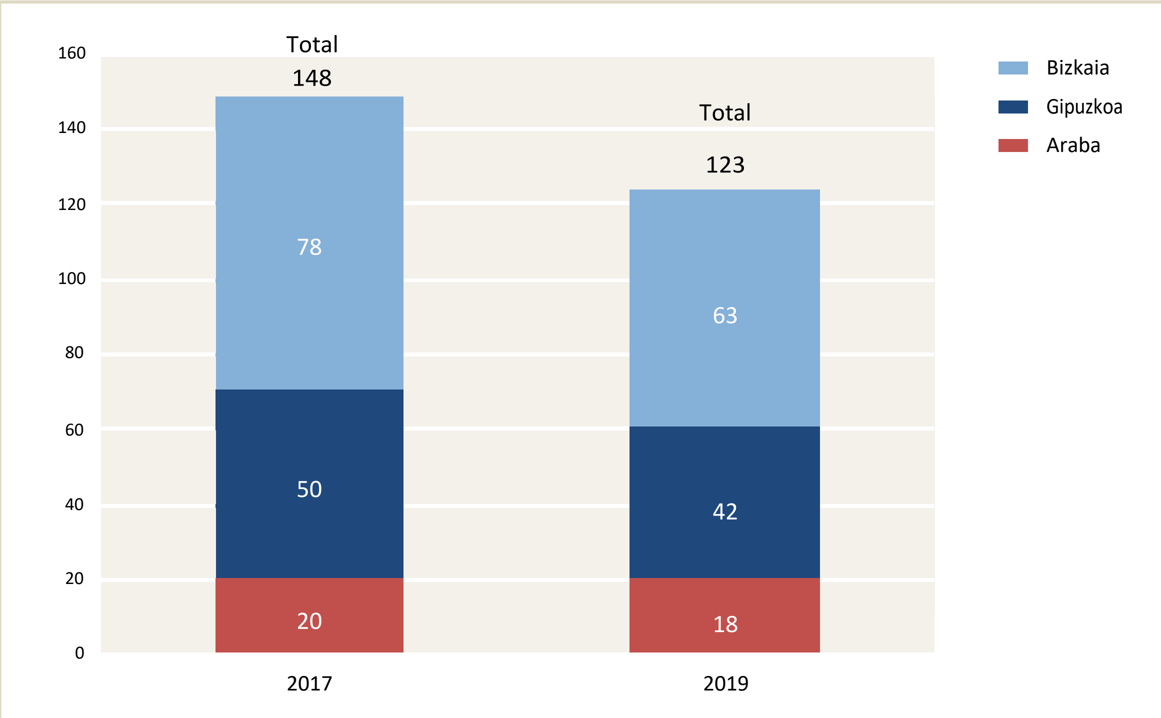


Figure 33. Own campaigns per Historical Territory 2017-2019

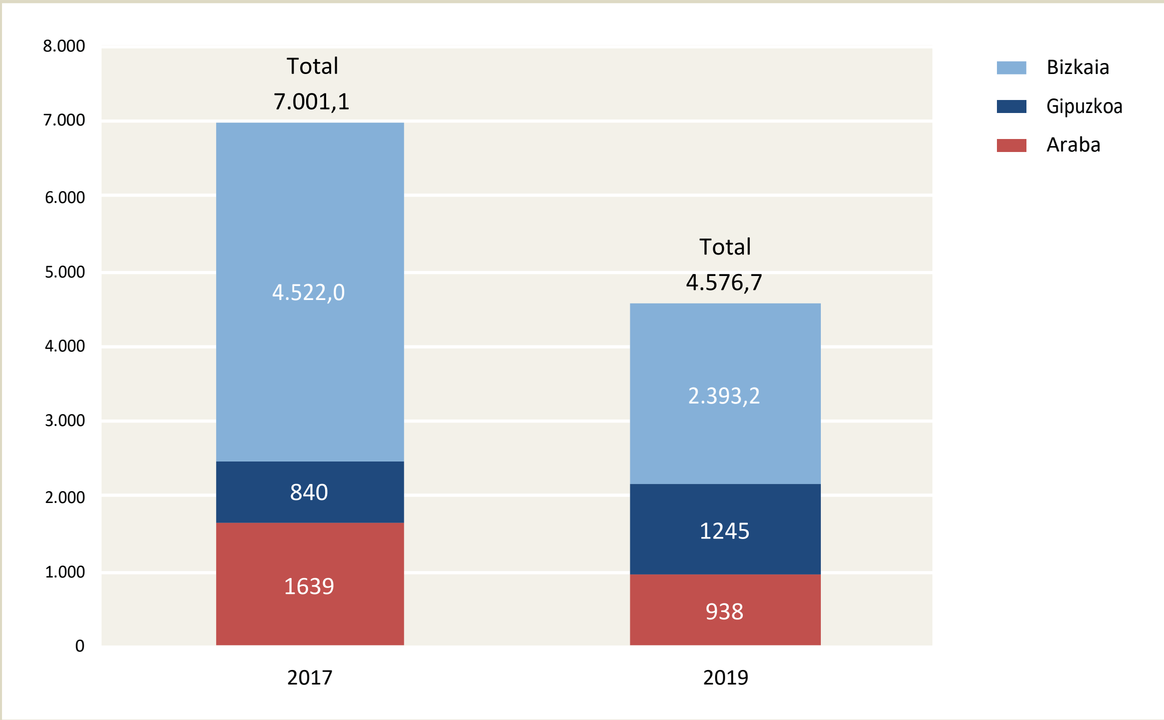
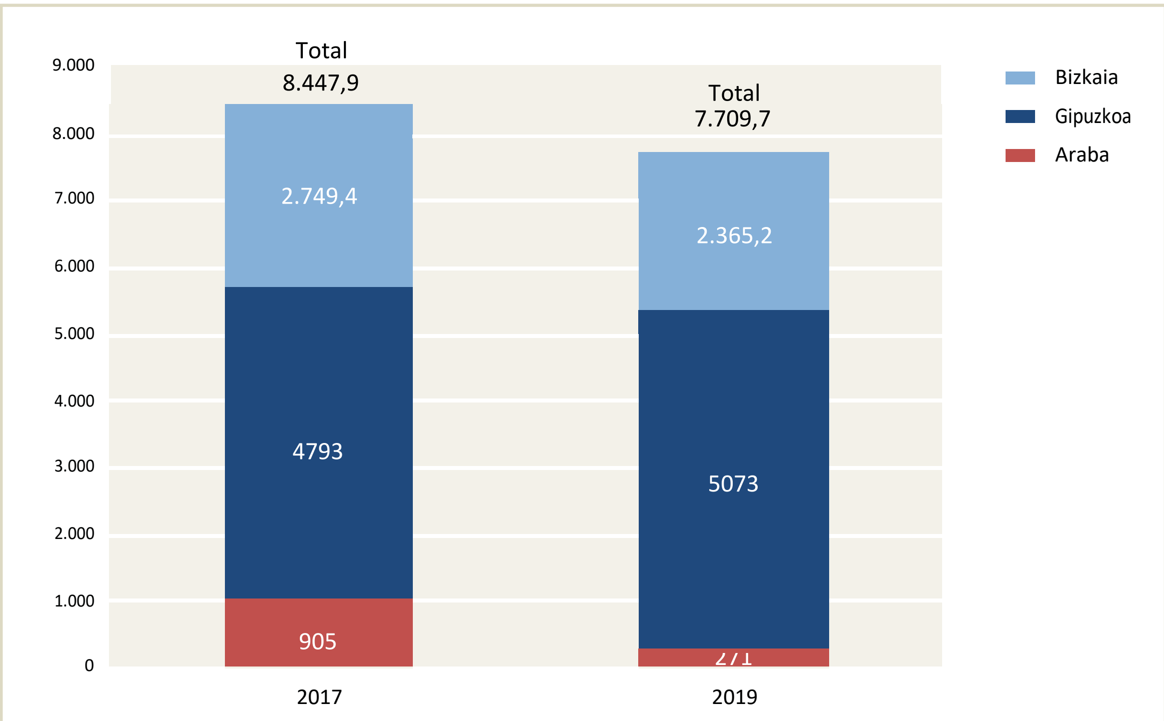


Figure 34. Services by Historical Territory 2017-2019



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 workers 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 30.8 people employed, while the sector average in 10.5 people employed per company.

Figure 35. Advertising companies according to revenue 2017-2019

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	More than €1,000,000	28,0	18,9	74,2	58,8	31,4
	From €500,001 to €1,000,000	28,0	18,9	12,8	17,6	9,5
	From €100,000 to €500,000	71,0	48,0	12,2	20,7	4,4
	Less than 100,000	21,0	14,2	0,8	3,2	2,3
Total		148,0	100,0	100,0	100,0	10,2
2019	More than €1,000,000	27,0	22,0	78,8	64,1	30,8
	From €500,001 to €1,000,000	15,0	12,2	7,5	9,9	8,5
	From €100,000 to €500,000	62,0	50,4	12,8	22,2	4,6
	Less than 100,000	19,0	15,4	0,9	3,8	2,6
Total		123,0	100,0	100,0	100,0	10,5

When 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 (78.0%).

Figure 36. Advertising companies according to the number of workers equivalent to full-time annualised 2017-2019

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	112,0	75,7
	Small business: 10 -49 employees	36,0	24,4
Total		148,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	96,0	78,0
	Small business: 10 -49 employees	25,0	20,3
	Medium/large company: more than 50 employees	2,0	1,6
Total		123,0	100,0

4.2.6. Video games

The video games sector is made up of 19 agents, of whom 73.7% are located in Bizkaia, 21.1% in Gipuzkoa, and 5.3% in Araba. In the territories of Araba and Gipuzkoa, the ratios per 100,000 inhabitants are below average (0.5 and 0.7, respectively) and in the case of Bizkaia, above average (1.7).

The sector's volume of activity is distributed slightly differently to the territorial distribution. In Gipuzkoa, 44.6% 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 (53.6%), but the ratio of projects per agent is lower than the average of the CAE.

Figure 37. Video games companies by Historical Territory
2017-2019

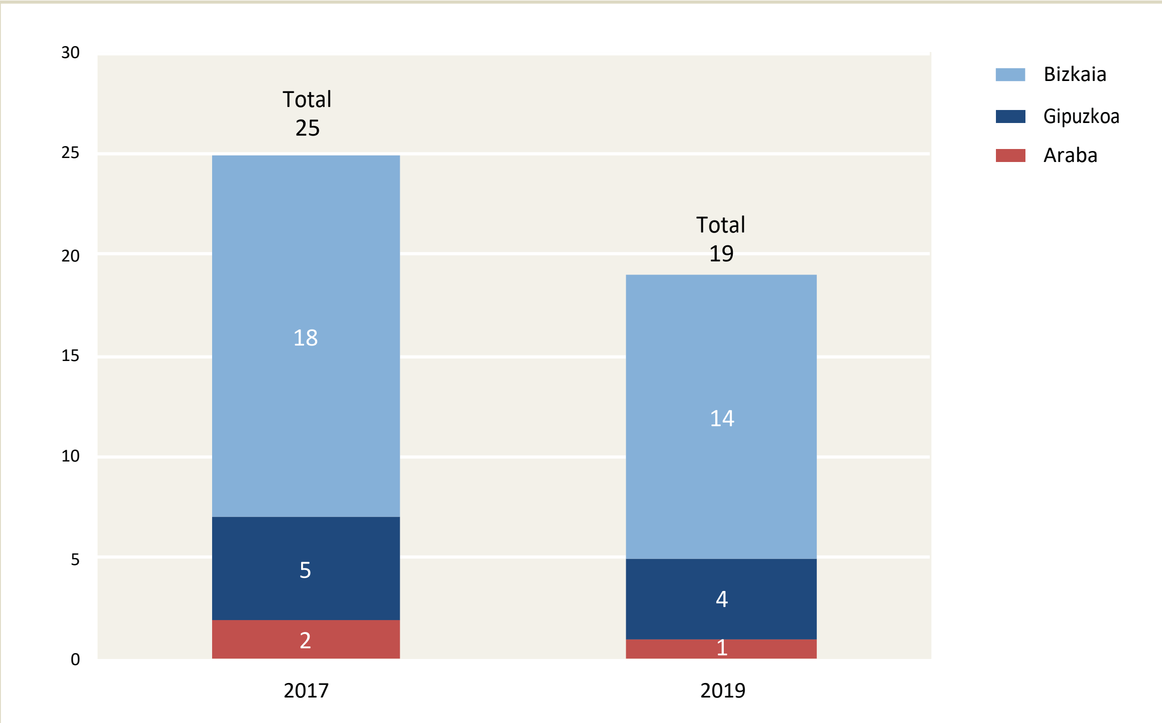
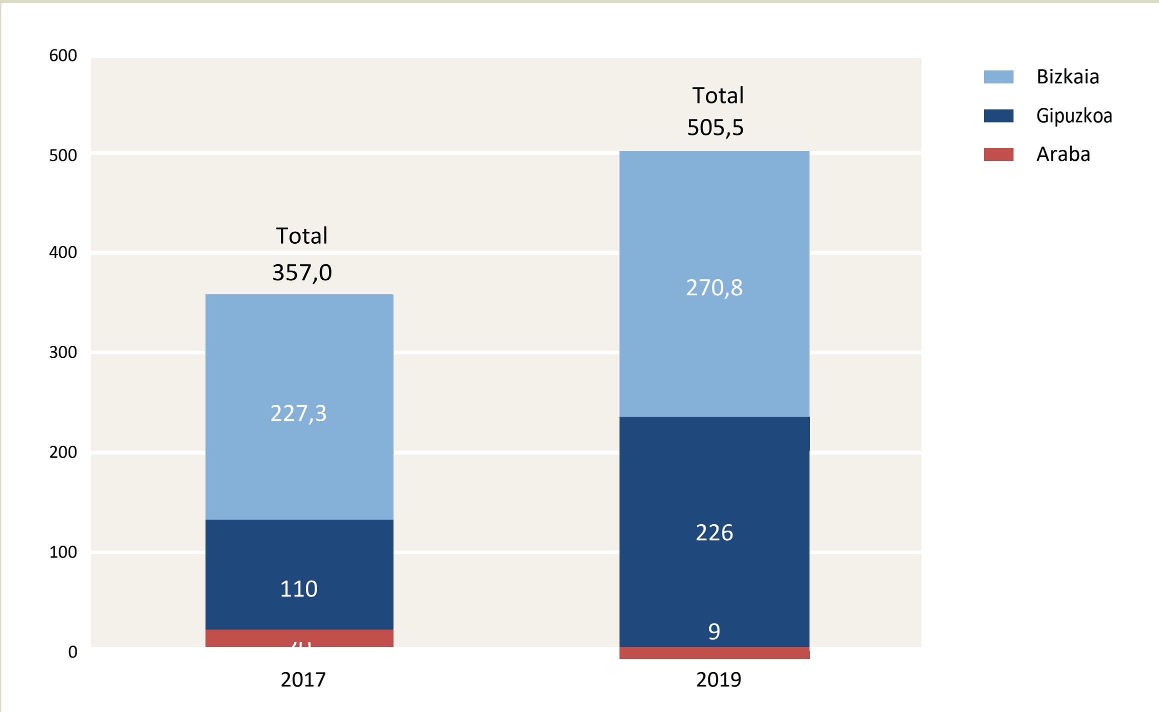


Figure 38. Activity of video game companies by Historical Territory 2017-2019



57.9% of video game agents obtain revenue lower than 500,000 euro. However, 87.1% of the revenue is concentrated in those companies which accrue revenue higher than 500,000 euro (and account for 42.1% of agents). These agents also accrue the greatest percentage of employment, 77.4%; the average of people employed per company is 25.9, much higher than the sector average (14.1).

Figure 39. Video game companies according to revenue 2017

Year		Agents		Revenue	Workers equivalent to full-time annualised	
		Freq.	%	%	%	Average
2017	Plus de 500.000 €	7,0	28,0	75,0	57,6	20,8
	From €100,000 to €500,000	10,0	40,0	22,6	33,7	8,5
	Less than 100,000	8,0	32,0	2,3	8,7	2,7
Total		25,0	100,0	100,0	100,0	10,1
2019	Plus de 500.000 €	8,0	42,1	87,1	77,4	25,9
	From €100,000 to €500,000	5,0	26,3	11,0	17,2	9,2
	Less than 100,000	6,0	31,6	1,9	5,5	2,4
Total		19,0	100,0	100,0	100,0	14,1

Regarding the size of the companies according to employment, the distribution is fairly equitable between micro-companies (47.4%) and small companies (52.6%).

Figure 40. Video game companies according to the number of workers equivalent to full-time annualised 2017

Year		Freq.	%
2017	Micro-enterprises: fewer than 10 jobs	16,0	64,0
	Small business: 10 -49 employees	9,0	36,0
	Medium/large company: more than 50 employees	-	-
Total		25,0	100,0
2019	Micro-enterprises: fewer than 10 jobs	9,0	47,4
	Small business: 10 -49 employees	10,0	52,6
	Medium/large company: more than 50 employees	-	-
Total		19,0	100,0

5. Internationalisation

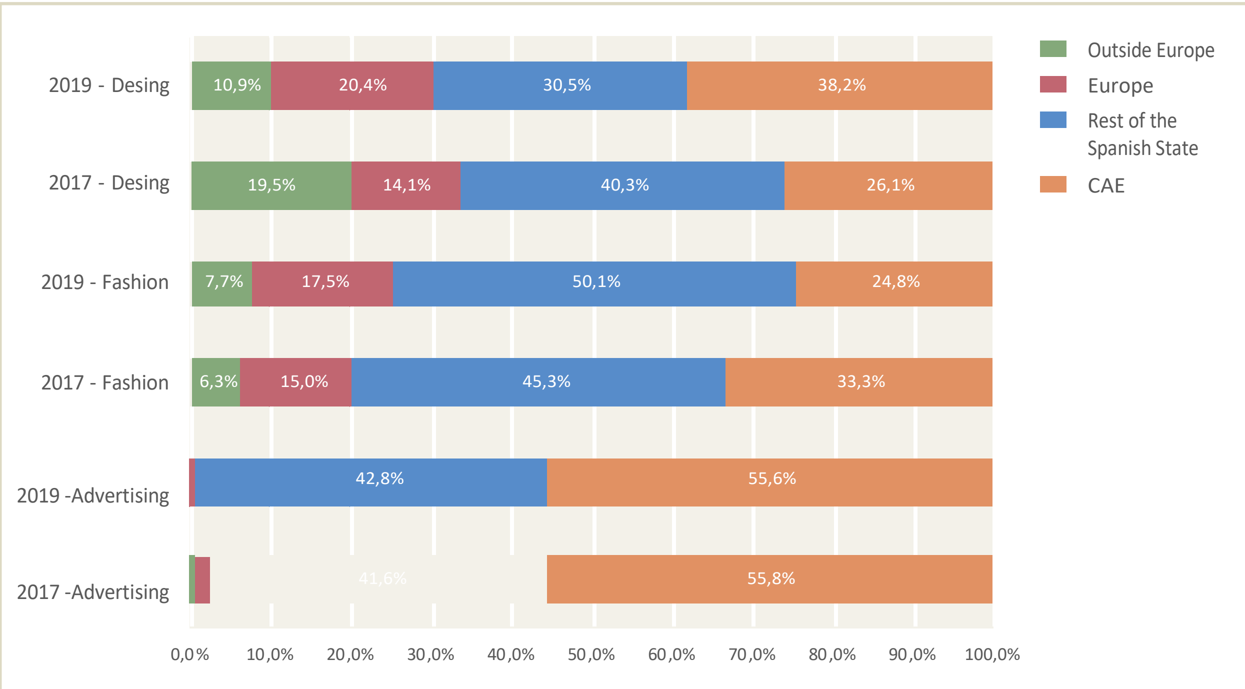
This chapter aims to analyse the capacity for internationalisation of the Creative Industries. The data show trends in internationalisation of design, fashion and advertising. The main market in the three cases ¡s the rest of the Spanish state (around 30-50% of their invoicing).

The design sector is that with the greatest weight in its invoicing of foreign markets. Of the total of its invoicing, 10.9% is concentrated in countries outside Europe and 20.4% in European markets. Its invoicing in the Autonomous Community of the Basque Country amounts to 38% of the total.

In the case of fashion, the percentage of the European and rest of the world markets is less, around 25.0%, and in the advertising sector, the main market is domestic (55.6% of invoicing pertains to the market of the Autonomous Community of the Basque Country).

Figure 41. Advertising companies' invoicing according to market

2017-2019

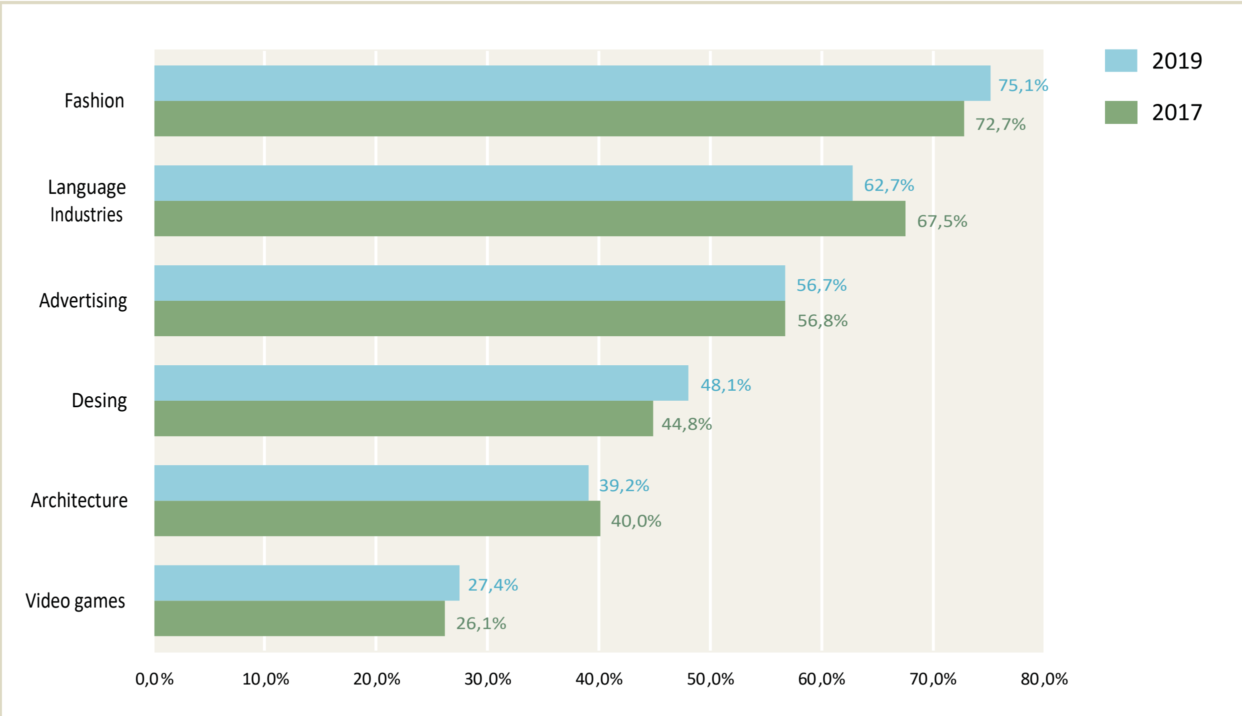


6. Gender

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 and 6, respectively, 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 42. Women workers by sector in the Creative Industries

Percentage · 2017-2019



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 8 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 2 women out of every 10 people employed occupy directorship posts. In the case of fashion and language industries, 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 77.0% and 63.5%, respectively).

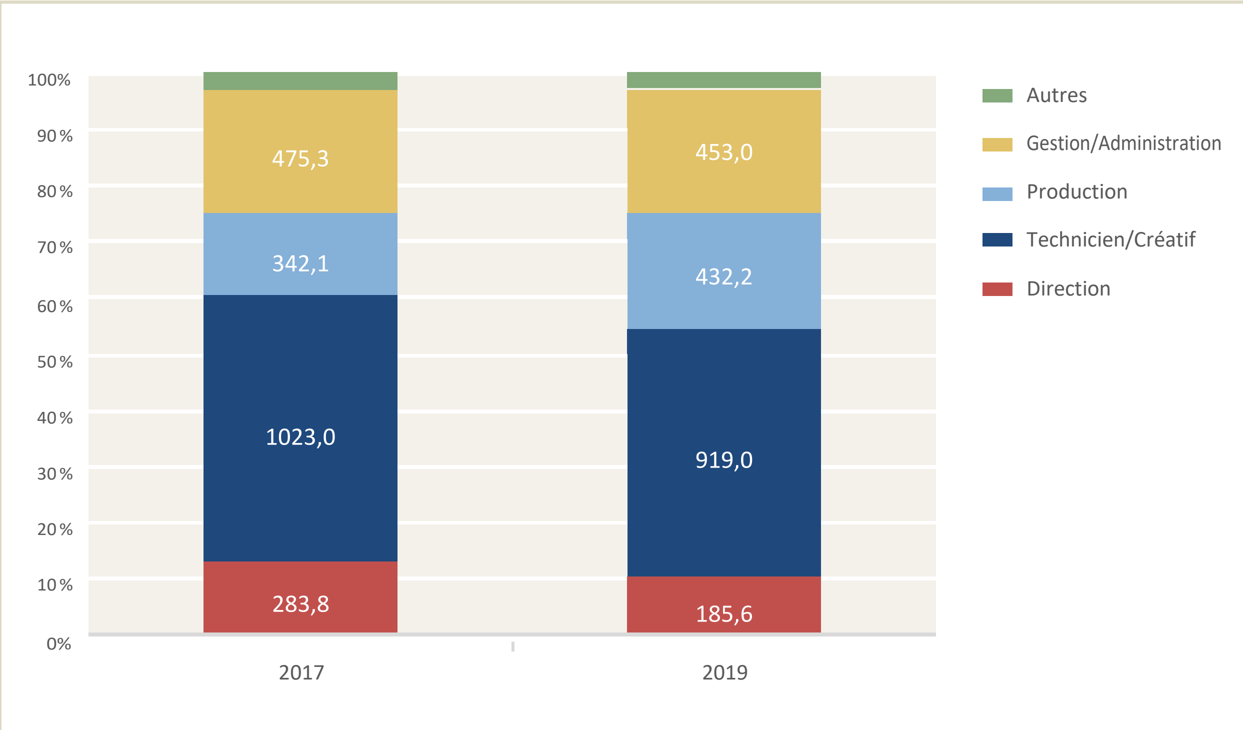
From a global perspective, the sector with least female presence in the video games sector.

Figure 43. Women workers by sector in the Creative Industries and professional function Percentagee · 2017-2019

Year		Director-ship	Techni-cal/Crea-tive	Produc-tion	Mana-gement/ Adminis-tration	Others	Total
2017	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
2019	Architecture	20,4	39,3		74,0	15,2	39,2
	Design	40,7	42,8	22,1	87,2	60,7	48,1
	Language Industries	52,1	63,5		69,2	65,8	62,7
	Fashion	54,1	77,0	80,9	76,2	51,1	75,1
	Advertising	32,7	49,9	64,9	79,8	40,8	56,7
	Video games	22,2	23,6		58,4	42,3	27,4

Finally, looking at the distribution of total female workers in the Creative Industries as a whole (2,041.5 jobs in 2019) by professional role, technical and creative profiles are close to half of all jobs, followed by those linked to management/administration (453 jobs), production (432.2), managerial profiles (185.6) and others not specified (51.7).

Figure 44. Distribution of women workers by professional function Absolutes · 2017-2019



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