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Creative Economy and Policy

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Abstract

The challenges currently facing systems of media provision across Europe require critical, multi-disciplinary research informed by creative economy and policy perspectives. Creative economy themes of relevance to media include the exceptional economic characteristics of cultural and creative content, production activities and markets. The use and efficacy of copyright and alternative policy interventions to support creativity represent important emerging areas for media-related research. The effects of changing technology are another priority. More research is needed that builds our critical understanding of the implications of contemporary changes in audience behaviour, of converged multi-platform strategies for supplying content and of globalised distribution for creative outputs.

Key words:

Creative economy; convergence; cultural policy; internet; copyright; concentration.

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Introduction

In recent years, interest among media researchers in creativity, the creative economy and related policy questions has increased substantially. However creativity is a slippery concept. The term ‘creative economy’ is in common usage but what it actually means and which sectors it actually includes are matters for divided opinion. Howkins (2001) describes the creative economy as comprising those sectors which rely on individual creativity and where the outcome involves intellectual property. Others take the view that this definition is too broad and overlooks quintessentially cultural dimensions of creative provision (Galloway and Dunlop, 2007). Whatever definition is used, most commentators agree that media content creation falls centrally within the ambit of the creative economy. Even so, research and scholarship in this area is bedevilled by a lack of consensus about the meaning of the core terminology and by a widespread tendency to use ‘creative industries’ and ‘cultural industries’ interchangeably.

The notion of the ‘cultural’ economy long predates the ascent, largely only since the 1990s, of creative industries. Throsby (2001: 4) defines the cultural economy as comprising sectors of activity that involve ‘some form of creativity in their production’ and where symbolic meanings are important and outputs embody intellectual property. Understood in this way, most if not all suppliers of media are involved in cultural industries. But the domain of ‘culture’ extends beyond media and includes, for example, the arts – literature, drama, dance, visual arts, etc – and heritage. Hesmondhalgh (2002: 12) describes cultural industries as comprising those sectors which are engaged directly in producing socio-cultural texts including ‘television, radio, the cinema, newspapers, magazine and book publishing, music recording and publishing industries, advertising, and the performing arts’. Albeit that media are part and parcel of the cultural economy, the themes and priorities which traditionally have guided academic research in cultural economics, such as copyright, artists labour markets and public subsidies for the arts, are different from the historic concerns of media

economics and they reflect the distinctive history of these two differing but partially overlapping subject areas.

In the UK, an initiative embarked on in 1998 by the Department of Culture, Media and Sport (DCMS) to define and map the UK's 'creative industries' is generally seen as the trigger for an upsurge in interest in this particular area. Throsby (2008) notes that whereas the DCMS (2001) definition of creative industries fails to mention culture and merely describes these as involving creativity, talent and potential for exploitation of intellectual property, the French definition emanating from the Département des Études, de la Prospective et Statistiques (DEPS, 2006) describes creative industries as involving creativity plus production of cultural content. Even though 'creativity' and 'culture' are clearly very different concepts, it appears that separating the notion of the creative economy from culture is not easy. Creativity, intellectual property and symbolic meaning are widely seen as key ingredients in respect of both creative industries and cultural ones. Definitions vary however. As Markusen et al note, '[f]rom the outset, concepts and measures of what constitutes a creative economy, creative city, creative class, cultural industry, and cultural workforce have been contested' (Markusen, Wassall, DeNatale and Cohen, 2008: 26). Some understanding of the extent to which definitions and understandings vary may be garnered from the fact that, in examining a number of studies of the so-called 'creative economy' in the Boston metropolitan area, this appears to vary in size from 1% to 49% of the total economy, depending which industries, firms and occupations are included (ibid).

As early as 1980s and 1990s, a body of research from European writers and thinkers had drawn attention to the potential for cultural industries to provide a basis for urban regeneration (Landry and Bianchini, 1995; Leadbetter and Oakley, 1999; Myerscough, 1988). But the main catalyst for popularisation of the idea that creative industries can act as a propeller for the wider economy was Richard Florida's influential work on the role of creativity in regional and urban economic development (Florida, 2002). The views, propagated by Florida and others, that creative sectors of the economy are growing rapidly

and that creativity acts as a driver to economic growth have achieved growing recognition and have been widely embraced by public policy-makers across Europe and around the globe in recent years (Cunningham, 2001). The ascent of creative industries as a focus within politics and within cultural policy-making has naturally impressed itself onto evolving agendas for media research across Europe with, for example, many critically investigating the rise of creative industries ‘as doctrine’ (Schlesinger, 2007) and the emphasis placed on ‘creativity’ at the expense of other priorities which, it may be argued, ought to guide cultural policy-making (Hesmondhough and Pratt, 2005; Galloway and Dunlop, 2007; Hesmondhough, 2008).

As media research re-orientates to integrate the study of the creative economy, a range of disciplinary approaches will be called for. Given the distinctive economic contingencies of creative industries and how these necessitate specific strategic responses, it follows that multi-disciplinary research drawing at least partly on the theories and analytical tools provided by economics, management and policy analysis may be of particular relevance and value.

Cultural, creative and media industries

Cultural and creative industries, including media, are engaged in producing and supplying outputs which are imbued with symbolic value. Media organisations are involved in creatively producing and then conveying stories, messages and ideas, typically to large audiences. These activities involve significant socio-cultural ramifications for citizens and society. On account of the public welfare implications involved, research that falls within the ambit of the media or cultural economy, stems not only from traditional economics but also from the perspective called critical political economy. Gomery (1993: 198) made the case lucidly for adopting a more normative approach when he argued that ‘studying the

economics of mass communications as though one were trying to make toaster companies run leaner and meaner is far too narrow a perspective’.

The welfare impacts associated with producing symbolic goods or that stem from conveying stories, ideas and other forms of creative content to mass audiences are not easily incorporated within the framework of standard quantitative economic analysis, as economists working on media have long highlighted (Peacock, 1989). Researching media and cultural industries is beset by other challenges, including those that stem from the unusual ‘public good’ aspects of media content, or from grappling with the uncertainties and irrationalities that characterise production of creative output, or from the problem of trying to analyse an industry that is prone to constant technological change.

So-called public good characteristics attach to many media and cultural goods because the act of consumption does not reduce their supply to others (Withers, 2006:5). This unusual economic attribute has a strong influence on industry strategies and also a potentially complicating influence when it comes to policy. To the extent that the value in media content is tied up with properties that are non-physical and therefore scarcity is not a problem, this calls into question the need for rationing. But scarcity, rationing and choice are fundamental tenets of economics and of economic policy analysis. Media, cultural and creative production activities often sit uncomfortably with conventional economic theory. Yet economists have offered insights into the peculiarities of creative activity that can usefully inform emerging agendas in media research.

Creating professionally-crafted media content is typically an expensive business. Novelty is an essential ingredient in all media and creative output and the ever-present need for creative input – for newness and innovation - makes content production a labour-intensive process. Consequently, the production of commodities in the cultural industries as a whole (i.e. in arts as well as film, television etc) is said to suffer from ‘Baumol’s disease’ – named after US economist William Baumol. Baumol and Bowen (1966) first demonstrated how, in sectors

that rely on creativity, costs will tend to rise at a faster rate than inflation because creativity is a labour-intensive business.

The media industry has long been characterised by high initial or ‘first run’ production costs and, on account of the public good characteristics of content, relatively low marginal distribution costs, which is why economies of scale are such a prevalent feature of the sector (Doyle, 2013). Sometimes, a higher level of initial investment in the processes and elements involved in creating, say, a film or magazine or radio programme will positively enhance the attractiveness of the finished product and increase the likely overall size of the audience that will want to consume it. But this is by no means guaranteed. Richard Caves (2000) has highlighted how uncertainty about likely demand for an as yet unproduced item of content is a fact of life in all industries devoted to making creative products. Because a creative product is an ‘experience good’, the extent to which it will please and satisfy is a subjective matter and, quite simply, ‘nobody knows’ how consumers will respond or what will work (Caves: 2000: 3). Uncertainty about demand is inescapable and, as a result, a strong imperative guiding production in creative industries is the need to deploy strategies aimed at reducing risks. In other words, a key objective for content creation businesses is to establish operating conditions that are conducive to production of regular hits and that enable effective management of failure (Picard, 2005: 63).

The spread of digital technology has made it possible to produce and distribute media content at lower expense than in the past and the rise of the ‘prosumer’ and of user-generated digital content, often created at extremely low cost, has been an important theme in media research in recent years. Internet distribution has provided audiences with access to a much wider diversity of content offerings and has enabled far more widespread publication and enjoyment of low cost and less popular content items (Aris and Bughin, 2009). Another issue for research is to what extent, in an era of low cost and low risk production, the conventional model of publishing whereby decisions must be made about which content is worth investing in and which is rejected still makes sense (Shirky, 2010)?

However, since ‘micro-publishing’ and UGC have not yet seriously dented the general popularity of professionally-constructed media properties, the conventional model of publishing based on high initial investment and hopes of wide distribution to yield economies of scale is still widely evident and still predominates.

Effects of technological change

Digital convergence and growth of the internet have altered the landscape of media and cultural provision irrevocably in recent years, blurring sectoral and geographic boundaries, changing audience consumption behaviours, altering and overturning conventional conceptions of the supply chain, and transforming levels of revenue and resourcing across the media industry. These developments continue to impress themselves on research agendas for media. Many organizations have responded by migrating towards a multi-platform approach to production and distribution of content (Bennett and Strange, 2014; Doyle, 2015). This means that new ideas for content are considered in the context of a wide range of distribution possibilities such as online, mobile, interactive games and so on and not just a single delivery platform. In the television industry for example, adoption of a multi-platform outlook has been accompanied by the introduction of multi-platform commissioning processes whereby broadcasters will consider any ideas for new content not purely in terms of a channel but rather an array of potential digital outlets (Sørensen, 2013). In newspaper and magazine industries, a similar transition has occurred with production increasingly taking place in newsrooms that are converged or ‘fully integrated’ with staff creating products intended, from inception, for distribution on print, online and mobile platforms (Candy, 2014).

An important theme for ongoing research is how digitisation is affecting the conditions under which content is being produced (Deuze, 2007; Schlesinger and Doyle, 2014). Many studies have examined the way that, across Europe, newsrooms and news production practices have changed on account of digital convergence (Achtenhagen and Raviola, 2009;

Domingo, 2008; García Avilés and Carvajal, 2008; Spyridou et al, 2013) and, related to this, the challenges for newspapers of embedding a fully integrated approach to content production (Bressers, 2009; Erdal, 2011) and of facilitating innovation (Boczkowski and Ferris, 2005; Mico, Masip and Domingo, 2013). Such questions continue to dominate in journalism and media management research. A growing emphasis on innovation is reflected in a greater numbers of research centres, conferences and journals that explicitly refer to this in their titles.

Other key themes concern how content is affected by convergence (Roscoe, 2004; Ytreberg, 2009) and how diversity of content are being affected by the transition to a digital multi-platform environment. A number of recent studies have found that, contrary to what may be expected, digital expansion strategies are not necessarily conducive to greater diversity of content nor pluralism (Fenton, 2010; Lund, Willig and Blach-Ørsten, 2009; Doyle, 2015). Prevalent trends in the media towards expansion and concentration when combined with greater ease, thanks to digitization, of recycling content across platforms clearly suggests particular challenges for regulators in ensuring choice, access and diversity (Golding, 2000: 23) and this is a theme which will continue to dominate media research over many years to come.

Changes in audience behaviour, greater empowerment of audiences and greater opportunities for participation have been key themes in media research over recent years (Jenkins, 2006; Lundby 2008). Some studies have traced the rise of prosumer (Berman et al 2007) and the emergence of practices of remixing content (Drotner and Schrøder, 2010; Lessig, 2008). Lessig has famously flagged up the disjuncture between the rigidity of copyright law and the ready availability of remix technologies, arguing that copyright is out of step with the digital era. Others have sought to theorise the implications of greater audience involvement in content production (Dwyer, 2010) and the ways that digitization has given rise more shared and networked media experiences (Meikle and Young, 2011).

More such research is needed given remaining gaps in our understanding of the affects of shifting consumption behaviour and increasing audience participation.

One unmistakable trend is decline in levels of readership and advertising for print in developed media economies which, in turn, has brought great pressure to bear on incumbent newspaper groups to find ways to adapt and secure their future in a digital environment (Mitchelstein and Boczkowski, 2009; Picard, 2011). Much work has been carried out and more is needed that examines changing business models and opportunities surrounding the use of interactivity of digital platforms. In newspaper and magazine publishing, a vast amount of digital data is now flowing back into newsrooms about reader preferences and naturally this serves, to some extent at least, to influence content decisions (Turow, 2012; Schlesinger and Doyle, 2014). Similarly television planners whose output is distributed on digital platforms can now draw on a vastly increased reservoir of audience data. Yet across the media industry as a whole, the issue of how best to interrogate and utilise tidal waves of 'big data' currently being collected via the digital return path still remains largely unanswered (Doyle, 2015). Likewise, citizens and policy-makers lack a full understanding of the implications for individuals and society of persistent surveillance in the form of data-gathering via the digital return path by media service providers. Clearly this is an area where more research is needed.

Recent changes in markets and technology have encouraged strategies of expansion, including multi-platform and transnational expansion, by broadcasters and other major media companies (Küng, 2008; Murray, 2005). At the same time, EU Commission (2012: 4) has argued that: '[t]he cultural and creative sectors are faced with a rapidly changing environment driven by the digital shift and globalisation, leading to the emergence of new players, the coexistence of very big structures with micro-entities, a progressive transformation of value chains and evolving consumer behaviour and expectations.' The tensions set up between conflicting sociocultural concerns, on the one hand, and economic and industrial policy priorities, on the other, have presented regulators with difficult and

complex challenges (Valcke, Picard and Sükösd, 2015). Future critical research on these pressing issues is likely to benefit from multi-disciplinary approaches incorporating the perspectives of production, content and cultural studies, as well as economic and policy analysis.

Research that explores the implications of technological changes for media is of value to European firms and policy-makers as well as to academic scholarship as is reflected in the abundance of recent studies that, in one form or another, seek to shed light on how organizations have adapted their strategies to deal with digital developments. Even so, in a climate of ongoing upheaval, the task of building a full understanding of the transformative impacts of convergence and of the development of digital distribution infrastructures will remain a key challenge for many years to come.

Policy: interventions and purposes

Policy has long been at the centre of the agenda for media research. An important concern is what role the state can or should play in media provision? What forms of state intervention in the media industry are desirable? Is the regulatory environment suitably attuned to changing technological and market conditions? In recent years, the notion that creative industries (of which for example television producers and publishers are a part) are instrumental in propelling growth in the wider economy has extended the sort of policy-related concerns staking a claim for the attention of media researchers. In addition, growth of the internet, the development of more multi-platform, transnational conglomerates and the emergence of online bottlenecks raise new questions for media research about how to ensure the development of a healthy media industry in the digital era.

Questions about policies for media and creative industries entail both socio-political and economic dimensions. To the extent that industrial and economic considerations appear to wield an ever-growing influence over policy decision-making at national and EU level, it

follows that future critically analytical research about media and creative industries and policies will benefit from drawing on the tools and insights offered by economic theory and analysis.

Generally speaking, economics favours free markets as the best mechanism for allocating resources but intervention may be required in certain circumstances such as to address market failures, to deal with the problem of ‘externalities’ and to curb monopoly power. Such circumstances are a regular occurrence in media, cultural and creative industries. A market failure might occur because the normal or standard methods for collecting payments (such as charging consumers a price in return for a good) are simply not open to suppliers of media or other creative outputs. Instances of market failure can occur in broadcasting if, for example, stemming from the fact that consumption of informational goods is non-rivalrous, no means exists for a supplier of broadcast services to derive payments from viewers or listeners. Another similar sort of market failure is, in a world where copying is easy, the absence of any means for the producer of an original creative output to sustain this activity by monopolising the economic returns from it (Towse, 2004; Handke, 2010). Market failures provide a justification for intervention and, in the case of the latter, copyright is the internationally agreed if increasingly contested solution to a key source of market failure in the creative economy.

The system of rewards that copyright law enshrines addresses the perceived problem that, in a free and unregulated market, fewer creative works would be produced than is socially desirable (Lilley, 2006: 3). Without copyright, fewer creative outputs – including television programmes, films and other media outputs - would be produced and, so the argument goes, all would lose out. The development of copyright has traditionally been underpinned by the view that public interventions to foster and encourage creativity are economically desirable. This idea has been spurred on strongly in recent years by the argument advanced by Florida (2002) and others, and widely embraced by policy-makers across Europe, that creativity acts as a vital stimulant to economic growth (Andari et al, 2007). Hence the role of measures to

support the creative industries - copyright being a case in point - has become an increasingly important subject for research.

But the extent to which a rights regime is essential in incentivising creativity is a controversial matter since, arguably, few artists or creators would cite copyright as the decisive factor in their choice of career (Schlesinger and Waelde, 2012). As others have noted, although returns to artists (despite being highly skewed) are typically low, this does not necessarily appear to impede the general willingness of artists to work (Towse, 2004). On the contrary, some artists' labour markets are characterised by a persistent over-supply of creative workers (WIPO, 2003: 24). Strengthening copyright or extending its term will not automatically translate into higher levels of creative output if the motivations to engage in production of creative outputs are, for the most part, intrinsic (Withers, 2006: 15). Are the motives that guide journalists and television producers intrinsic? To the extent that media are part of what is seen as 'creative' industries this introduces a host of interesting research questions about conditions surrounding creative media production, incentives for content producers, the functioning of markets for creative labour or 'talent' and related policies issues.

Externalities represent another persistent source of market failure in the media and how these should be addressed is an ongoing issue for media research. Externalities occur when there is a misalignment between the private costs to a firm of engaging in an activity (e.g. supplying content of a certain sort – say, violent content - to audiences) and the wider social costs of doing so. Externalities constitute the effects, either costs or benefits, which are imposed third parties when, for example, a broadcaster supplies content which affects audience behavior to the betterment or detriment of societal welfare. External effects provide an economic justification for public subsidies for creation of content insofar as it is assumed that there are some forms of content which confer benefits on society but in a free market situation would be under-supplied and therefore in order to encourage production of

such material subsidies are needed. Across Europe, special subsidies and other interventions in support of local audiovisual content production are widespread and their use and effectiveness is another area for research (Guerrieri, Iapadre and Koopman, 2004; Voon, 2007).

Despite limitations in the available data, it is very clear from a variety of statistical sources that the US is by far and away the largest exporter of television and also film content (USITC, 2014). A number of factors account for this, including advantages of scale, wealth and language. It is widely although not universally accepted that, where audiovisual is concerned, interventions are still needed to counteract market failures and problematic externalities as well as to restrict the exercise of monopoly power. In addition, governments often intervene on socio-cultural grounds because encouraging and sustaining indigenous content production is seen as necessary in ensuring diversity and pluralism. Preservation of access to diverse audiovisual outputs, including indigenously-made content, is regarded as essential in promoting social cohesion and integration, in maintaining plurality and democracy and in sustaining regional and national identities and in some cases languages (UNESCO, 2002: 5-6). Moreover, ‘diversity’ is not a natural outcome in industries characterised by widespread economies of scale. This is very true of the audiovisual sector where advantages of scale are highly prevalent and influential in terms of industry structures and patterns of trade.

The imperative of exploiting the public good characteristics within media content and the need to spread per-consumer production costs across an extended audience base are reflected in a natural and persistent gravitation in media industries towards oligopoly and monopolisation. As numerous empirical studies have shown, the tendency towards highly concentrated levels of ownership is a widespread and common feature of media industries across Europe and internationally (Noam, 2013). A critical question for research is what effect digital technologies may have on tendencies towards monopolization? Will the era of

the open internet and of digital abundance help eradicate problems of excessive dominance? Or will digitization merely accentuate the economic logic of corporate expansion and of vertically integrated transnational media conglomerates?

Judging by how media organisations have responded to date to the on-going globalization of media markets and to the effects of convergence in blurring the boundaries between media and other industries – i.e. through continued expansion and conglomeration - it is fair to assume that concerns about concentrated ownership will continue to feature on the agenda of media policy-makers across Europe. As market structures become more competitive and international in outlook on account of digitisation, opportunities to exploit economies of scale and scope, which are naturally present in the media, have become all the more alluring (Aris and Bughin, 2009; Küng, 2008). The growing use of digital technology and of online distribution have generally made it more feasible on a cost-efficient basis to extend consumption of media products and services across sectoral and geographic frontiers, thereby yielding enhanced economic benefits to large-scale and diversified media organisations (Doyle, 2013). Therefore critical questions about the effects on diversity and pluralism and also on competition and efficiency of corporate expansion in a globalised digital media economy are important subjects for research.

In recent years, the internet has spawned many new media-related functions and forms of service provision (including search engines, aggregators and SNSs) and, in turn, new dominant players with extensive power to control and shape how individuals interface with media content on digital platforms (ibid). Search engines, for example, have become indispensable in finding content online (Van Eijk, 2009). Looking ahead, a priority for media research and policy in Europe will be to identify the emergence of dominant online players who may be contributing to new bottlenecks or may constitute gateway monopolists that, in turn, pose a risk to pluralism. At the same time, policy-makers will want to avoid introducing interventions that risk choking off rates of investment and innovation in new media-related and online services (Richards, 2010). Ongoing research will need to build

public understanding both of the commercial and creative opportunities presented by the spread of digital technology as well as the critical issues for policy at national and European level.

Conclusions

Agendas for research on media in Europe need to reflect the role of media as part of the creative economy. Creative economy themes of clear relevance to media and that call out for further investigation include the exceptional economic characteristics of cultural and creative content, production activities and markets. The challenges facing systems of media provision across Europe require critical, multi-disciplinary research informed by creative economy and policy perspectives. For example, the use and efficacy of copyright and alternative sorts of policy interventions to support creativity represents a vibrant emerging area for media-related research. The effects of changing technology are another priority. More research is needed that builds our critical understanding of the implications of contemporary changes in audience behaviour, of converged multi-platform strategies for supplying content and of globalised distribution for creative outputs.

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