

LOCATION PATTERNS AND LOCATION FACTORS IN CULTURAL AND CREATIVE INDUSTRIES¹

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ABSTRACT: The paper analyses spatial and locational aspects of cultural and creative industries (CCI) taking into consideration the internal heterogeneity of this group of activities. Emphasis is put on similarities and differences in those aspects found for the sector as a whole and for its individual branches. On the basis of the proposed criteria the paper tries to exemplify a set of CCI characteristics, on the one hand to highlight their diversity, and on the other, to select the best criteria for analysing spatial and locational aspects of CCIs. A detailed analysis of CCI location patterns and location factors is also carried out, and on this basis two groups of models of the spatial aspects of CCIs are proposed: those of CCI location and those of the range of CCI markets.

KEY WORDS: creative industries, cultural industries, location patterns, location factors

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Introduction

Over the last 20 years, cultural and creative industries (CCI) have become an object of interest to both, academic research and public policy connected with local and regional development. What we term CCI today is in fact a highly diversified group of activities sometimes differing widely in character. Those activities have long existed, but it was only in the late 20th century that they were collected under the umbrella of a single category. This follows, among other things, from the transformation taking place in

the capitalism of that time and the emergence of its new form that Scott (2007, 2008) calls cultural-cognitive capitalism. One of its chief features is that an increasing number of goods produced and consumed in a society have not only a utility value, but also a so-called cultural value (Throsby 2001: 26–36), and it is the latter that often decides about the exchange value of such goods. Thus, value added has increasingly been derived from elements of a non-material nature, like signs, symbols, the aesthetics of an object, etc., used by activities called creative industries.

One of the first to attempt defining creative industries was the British Department for Culture, Media and Sport in its *Creative Industries Mapping Document*, which described them as “those activities which have their origin in individual

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creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS 1998: 3). On its basis a classification of creative industries was made, criticised for the artificial distinction of creative branches, although each new product appears as a result of human creativity, and for the inadequacy of the branches listed, e.g. the inclusion of trade in antiques. The classification also combined highly capital-intensive branches (e.g. film, radio and television) with highly labour-intensive ones (visual arts, crafts, fashion, music and performing arts), as well as activities driven by trade and the business cycle (like advertising and architecture) with less commercialised ones (Flew 2012b). This caused the DCMS to introduce amendments and publish another document in 2001, but the changes were only slight. The original definition from the year 1998 remained in use by the DCMS and other countries as a foundation for their own definitions. Significantly, the DCMS document of 1998 mapping creative branches has given rise to several programmes and measures undertaken by public institutions that influenced the entire British economy (BOP Consulting 2010). Besides, it has played a key role in international political discourse on the essence and definition of the creative sector (Flew 2012b). Because of the dis-

putable nature of the DCMS classification, the appearance of an alternative analytical framework for the research on the British creative sector has only been a question of time. Other classifications have been created by organisations operating at both, the national (Nesta 2006; Frontier Economics 2013) and the international level (KEA 2006; UNDP, UNCTAD 2008). It was only in 2013 that, after several years of discussion and consultation, the DCMS introduced a new 'creative economy' approach and proposed a modified classification by implementing a new methodology for determining which occupation and industry were classified as 'creative' (DCMS 2014). It included new creative activities such as museums, galleries and libraries, and archives. This change is quite notable, because these sectors did not figure in the British definition of creative industries. Other organisations, like the European Commission or the United Nations, have considered the cultural heritage an integral element of the creative economy for quite some time (KEA 2006; UNDP, UNCTAD 2008).

The dilemma of a proper delimitation of activities also appears when distinguishing between *creative industries* and *cultural industries*. The latter are sometimes listed as a special subset of creative industries largely based on culture, but its separation is still debatable. In the literature

Table 1. Selected criteria for the delimitation of creative and cultural industries.

Delimitation criterion	Creative industries	Cultural industries
Utility value	Utility value dominates over symbolic one (e.g. industrial design, fashion design, advertising, architecture, graphic design)	Predominance of non-material values, like some ideas or aesthetic impressions, over functionality (e.g. film, music, computer games, performing arts)
Commercialisation and sources of funding	High level of commercialisation, private sources of funding (e.g. advertising, architecture, computer games, film, music, publishing)	Low level of commercialisation, often subsidised from public funds (e.g. museums and galleries, theatres and opera houses, libraries)
Character of goods and services produced	Final product is an intermediate commodity used in further production processes (e.g. software and data processing systems, artistic education)	Final product is a cultural good the consumption of which is considered an aim in itself (e.g. film, music, computer games)
Location of creative activity	Mainly concentrated or clustered location, predominantly in urban areas, often following related industries (e.g. design following manufacturing)	Mainly dispersed location, both in urban and non-urban areas (e.g. photography, libraries)
Market range	Orientation towards global market, recipient's location does not matter (e.g. computer games, film, music, fashion, design, advertising)	Orientation towards local market, recipient's proximity is of key significance (e.g. museums and galleries, system of artistic education, libraries, theatres and opera houses)

Source: own compilation on the basis of Galloway, Dunlop (2007), Stryjakiewicz, Stachowiak (2010), and Lewandowski et al. (2010).

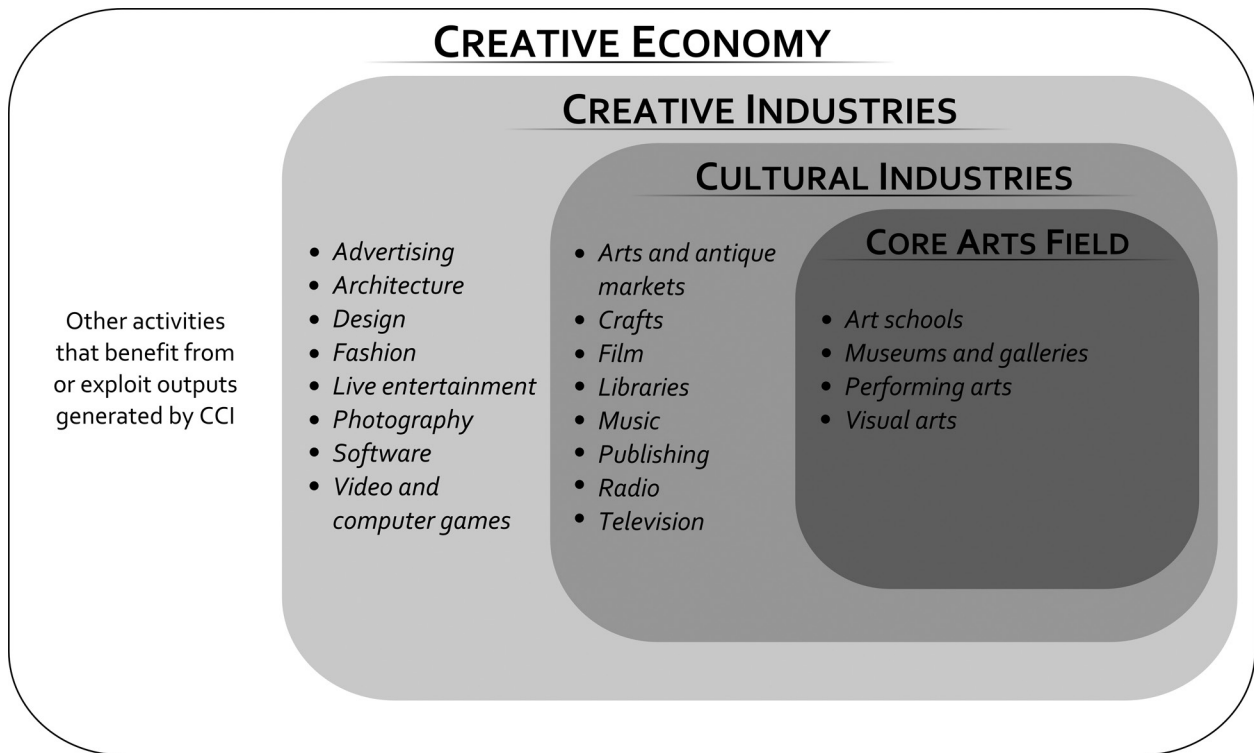


Fig. 1. Cultural and creative industries and their place in the economy.
Source: own compilation on the basis of KEA (2006).

on the subject, the first term to be used was that of *cultural industries*, then at the start of the 21st century *creative industries* gained in popularity among authors (Hesmondhalgh, Pratt 2005). The understanding of the notion of the creative sector, and in particular the division of activities into creative and cultural industries, differs in individual countries because of their historical development or differences in the direction of national cultural policies (Hölzl 2006), and within a single country, owing to various theoretical approaches adopted. The two terms are generally confused, and some authors also use them interchangeably (Galloway, Dunlop 2007). This is probably due to difficulties with giving the two notions sharp boundaries, and to the multitude of conceptions of their delimitation. The trouble with defining those notions derives from the various criteria adopted to separate the highly intertwined creative and cultural industries. To illustrate the complication of this issue, Table 1 presents the most popular criteria employed.

As Throsby (2008a) points out, the alternative definitions of creative and cultural industries lead to the construction of different models of the cultural production sector of the economy and hence to a different array of specific indus-

tries that the sector embraces. It is not our goal to make a survey of, or discuss, those definitions and classifications; they can be found in the literature (cf. Galloway, Dunlop 2007; Throsby 2008a). What we want to do in this paper is to have a look at spatial and locational aspects of those industries taking into consideration the internal heterogeneity of this group. The studies carried out so far have either dealt with individual CCI branches (e.g. Hracz 2012; De Vaan et al. 2013; Lange, Bürkner 2013; Plum, Hassink 2014), or the sector as a whole (e.g. Caves 2000; Throsby 2008b; Flew 2012a). We want to emphasise similarities and differences in the spatial and locational aspects found for the sector as a whole and for its individual branches. We adopt a broad definition of CCIs (Fig. 1), largely relying on the one proposed by KEA (2006). We treat them as a whole, not forgetting the highly diversified nature of activities in this category and a broader context of the creative economy. On the basis of the criteria presented in Table 1, we have worked out a set of CCI characteristics (Section 2) intended, on the one hand, to highlight their diversity, and on the other, to select the best criteria for analysing spatial and locational aspects of CCIs. Next, we analyse CCI location patterns

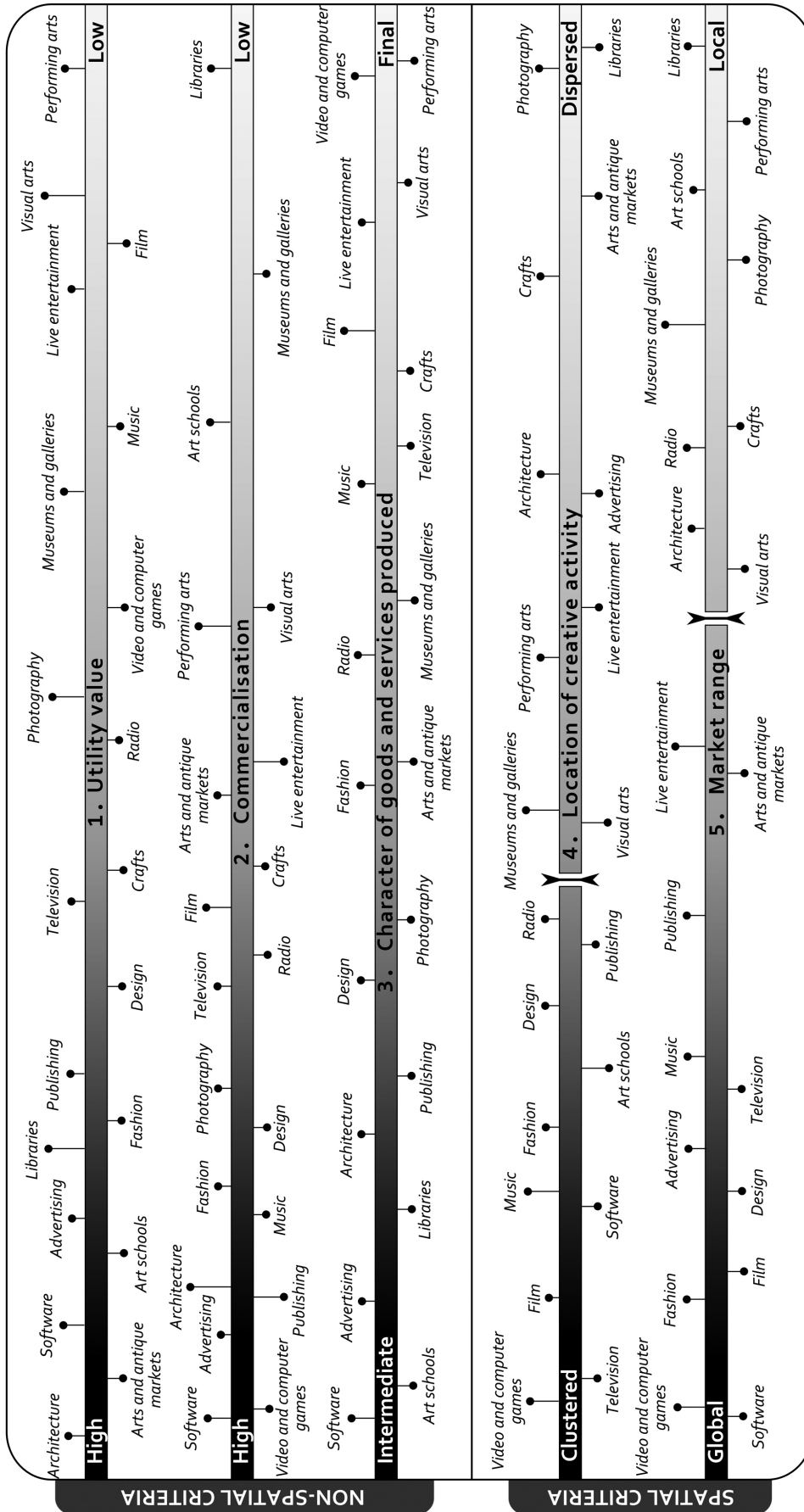


Fig. 2. Characteristics of the CCIs using five criteria (in the case of the last two criteria, we have also set on the axes demarcation lines to determine clustered and dispersed as well as global and local industries).

Source: own compilation on the basis of Lewandowski et al. (2010), UNCTAD (2010), Boix et al. (2011), and Power (2011).

and location factors (Sections 3 and 4), and on this basis we propose two groups of models of the spatial aspects of CCIs: those of CCI location and those of the range of CCI markets (Sections 5 and 6).

Cultural and creative industries and their spatial dimension

On the basis of particular criteria: (1) utility value; (2) commercialisation; (3) character of goods and services produced; (4) location of creative activity; and (5) market range, we developed characteristics of the CCIs. For this purpose axes were drawn (Fig. 2), the opposite ends of which symbolise extreme values, e.g. the highest and the lowest utility value, a global and a local range of the market, etc. On each of those axes the 20 creative branches listed above (Fig. 1) were placed. It should be emphasised that the points the branches occupy on the axes are approximate in nature. Two of the analysed five criteria (the range of the market and the character of the location of a creative activity) have a spatial and a locational nature, hence we subjected them to a deeper analysis.

With reference to the CCI characteristics presented above, two questions need an explanation. First, the terminology applied, or the use of the local-global continuum. Both scales are treated here "in a relational way as a spatial dimension of differences, a social measure that differentiates the space (...), and the transition from a local to a global scale is not a transition from one separate arena to another, but a process of developing a network of links that allow entities to move between various 'involvement spaces'" (Domański 2004: 179).

The other question is the understanding of the range of the market when creating the division. Let us explain it on the example of two branches qualified as local industries: performing arts as well as museums and galleries. It is obvious that those industries are not addressed to local residents only; sometimes they are one of the main attractions of a city, like London's West End or New York's Broadway. Thus, theoretically, museums, galleries, theatres and opera houses struggle for the customer also on the supra-local market, but a significant barrier one should not

forget here is the necessity of a direct contact with the recipient of culture. Most people in the developed world are consumers of such goods as films or music thanks to the intermediation of a variety of media, the Internet, and an extensive distribution network. But only a few people can go thousands of kilometres to experience an artistic product live. Hence also the division of the market range into global, where the recipient's location does not matter, and local, which does not mean that the offer is addressed to a customer living nearby, but to one who has to make an effort to appear in the given place in order to become a recipient of culture, irrespective of whether he has come 500 metres or 500 kilometres to get it.

After listing clustered and dispersed as well as global and local industries (the last two axes in Fig. 2), those axes were transected to see if there was any relation between the two classifications (Fig. 3). The points of transection are marked in Fig. 2 by arrows. Creative industries were found to occur in all four quarters of the diagram. This means that there are clustered-global, clustered-local, dispersed-global and dispersed-local industries. However, a slight tendency could be observed: the greatest number of global industries also belong to the set of clustered ones, and the greatest number of local industries, to dispersed ones.

Location patterns of cultural and creative industries

As to tendencies in the distribution of CCI enterprises, they are usually said to concentrate in urban areas and form specialised clusters (Rumpel et al. 2010). This generally high propensity for spatial concentration can be explained by urbanisation effects that follow from interactions among various sectors and activities, and that provide a counterbalance to the higher transport and operational costs here than if an enterprise is located in a peripheral area. Among significant urbanisation effects Rumpel et al. (2010) list the following:

- proximity of customers;
- proximity of suppliers;
- access to information;
- a creative milieu.

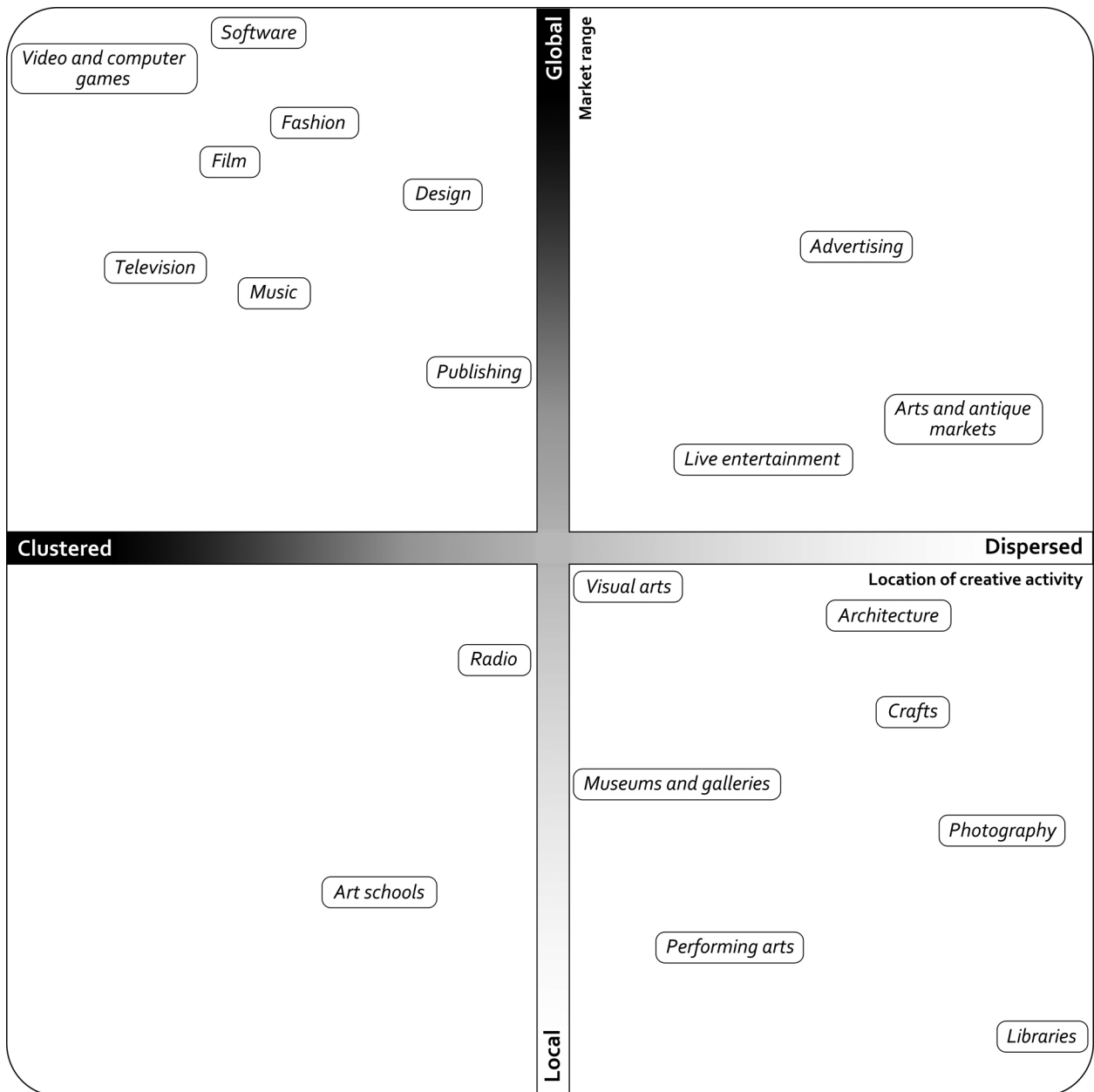


Fig. 3. Comparison of cultural and creative industries in terms of two criteria: their location and their market range. Source: own compilation.

Creative firms mostly produce one-off commodities or services, the final shape of which emerges in the course of close cooperation with customers. This interaction between firms and customers requires a relatively short geographical distance allowing frequent face-to-face contacts, in particular in the initial and final stages of the implementation of a project. The geographical proximity of a wider circle of recipients also reduces the high risk of customer loss characteristic of the creative sector. In turn, customers choose a supplier of creative goods and services from a larger pool than would be possible in peripher-

al areas. Spatial proximity can also have negative effects, as illustrated by Bathelt and Jentsch (2002, after Rumpel et al. 2010) on the example of Leipzig. The excessive orientation towards the local market can lead to stagnation caused by too strong links between suppliers and customers. However, one should remember that the proximity of customers is a key factor for operating in the given space only for a limited number of creative branches – local industries described more broadly in Section 6.

When speaking of the proximity of suppliers, it is worth emphasising that CCI commodities

and services are usually created by designing teams set up for a specified time. Some of them require specialised knowledge, often surpassing the competence of a single firm. The spatial proximity of other enterprises, also non-CCI ones, allows on the one hand a greater elasticity of response in the case of a dissolution of existing business relations, and on the other, it prevents the so-called paradox of embeddedness (Uzzi 1997), which can be explained by a simple mechanism. While ever new possibilities of profitable transactions with alternative partners keep turning up, enterprises will not want to be bound by long-term contracts with just one. However, when this type of opportunistic behaviour leads to a situation in which the uncertainty of exchange escalates and the risk in the transactions contracted is considerable, firms tend to think less of changing to more advantageous partners, which leads to their cooperation with a single one becoming too close. Rather than considering new transactions with strangers, more profitable but open to some risk, entrepreneurs prefer regular contacts with well-known actors (Lazzarini et al. 2008).

The success of firms largely depends on constant access to information and knowledge. In the literature on CCIs it is generally accepted that individual units gain information via the so-called 'local buzz'. It rests on both, a system of regular long-distance communication and on face-to-face meetings of persons from various firms within the same sector, area or region. Grabher (2002: 254) believes that a more adequate term to be used in this context is 'noise', since it best conveys "the concoction of rumours, impressions, recommendations, trade folklore, and strategic misinformation" on the basis of which enterprises not only make decisions, but also monitor competitors.

The last element of the effects listed by Rumpel et al. (2010) is a creative milieu. According to Florida (2002), a creative milieu is a habitat in which interconnected technological, entrepreneurial and artistic types of creativity stimulate one another. Such a specific social and cultural environment attracts new creative people and supports a dynamic transfer of knowledge and ideas. There are two chief aspects of a creative milieu: a concentration of creative capital and an accumulation of diversity. Here the term 'concentration' does not mean only a large number of people, but primarily the frequency and quality

of interactions taking place among them. Diversity, in turn, refers not only to a cultural variety, but also to people's activities and city functions (Meusburger 2009; Rumpel et al. 2010).

Empirical studies carried out in the Czech Republic corroborate that enterprises of selected creative branches have a strong tendency to locate in urban areas (Slach et al. 2013). In the case of the authors cited, those were the country's three largest urban agglomerations: Prague, Brno and Ostrava. Their research allowed them to conclude that the distribution of creative enterprises depended primarily on the hierarchy of settlements, because they found a positive correlation between population density and the location of creative branches. Still, they observed that Ostrava had fewer enterprises from the CCI sector than could be expected taking into consideration its population number. It turned out that there was a negative correlation between the location of CCIs on the one hand and employment in production and industrial specialisation on the other. Those findings can help understand the relatively small significance of creative branches in old industrial and peripheral regions (Slach et al. 2013).

Other kinds of information are supplied by a look at the location pattern of CCI enterprises in terms of individual branches. Using the example of the Italian creative sector, Bertacchini and Borrione (2013) carried out a research chiefly intended to give an insight into how the features of various creative industries affected their location patterns. Although it is generally believed that while service-oriented creative industries tend to locate in metropolitan areas owing to their customer orientation, those connected with design exhibit a more diversified location pattern. This differentiation, according to those authors, follows from the double nature of design. On the one hand, those branches have a strong productive character based on traditional craftsmanship or industrial techniques. And on the other, the designing process and innovativeness are significant factors in creating their non-material values and giving them a load of the local culture.

As a result, design may follow similar or different geographical location patterns as manufacturing, but the interrelations between those two types of activity are crucial for the emergence of creative systems of design-related industries

(Scott 1996). Although manufacturing often occurs in the same place as design, there are cases when both stages are totally disconnected in space. Design, whether a responsibility of specialised divisions in a firm or of contracted freelancers, increasingly becomes an independent activity geared towards preparing a project, irrespective of whether or not it is going to be put into production. This activity shows a tendency to locate in the creative milieu of metropolitan areas, unlike manufacturing, which tends to locate in specialised industrial zones (Bertacchini, Borrione 2013).

A good example of a creative industry the location pattern of which differs from those typical of other such branches is also the film industry. It is organised around the various stages in the production chain: a preparatory stage (pre-production), shooting (production) and post-production. Some researchers also add the stages of the distribution of a film and its exhibition. While traditionally almost the entire chain of film production used to be concentrated in a single place (e.g. in Hollywood), today a growing number of stages are implemented in a variety of locations (Walls, McKenzie 2012; Mirrlees 2013). In fact, film production has recently emerged as a global production network. The term 'global' does not necessarily imply that such a network actually spans the entire world; rather, it suggests that it is geographically extensive and functionally integrated across national boundaries. As such, globalisation of the film industry involves the expansion of production away from the traditional centres, whether to other countries or to other locations within the same country. This has been reinforced by recent trends in the film industry, like cross-border film production or the rise of production networks through international co-production initiatives, which affect established production locations (Dahlström, Hermlin 2007). Some groups, notably from the US film industry, refer to this development as a 'runaway production' (Johnson-Yale 2008). While it is now generally agreed that the film industry is turning into a global network, there is some dispute among scholars on whether the nodes of this network (film clusters) tend to become less important than the linkages (Wasko, Erickson 2008). Nevertheless, the majority of film production industries are concentrated in a relatively small number of places called film or media clusters

(Karlsson, Picard 2011). A new landscape of the global film production includes the global spread of film production infrastructure, such as film studios, the emergence of cost-cutting incentives, or policies intended to attract international film production, the rise of international collaboration in this field, the increased global interconnectedness of film production companies, and the emergence of satellite production centres. The example of the film industry shows that the location pattern of creative enterprises depends in particular on the kind of branch they represent, and on whether their activity divides into stages in the production chain.

Factors of the location of CCI enterprises

Before discussing the location of CCI enterprises, one should mention their three characteristics. First, they differ from other branches in that they focus on artistic goals to at least the same extent as on making a profit. Secondly, they are usually micro- and small businesses, and work in them is often organised around projects carried out by contractual workers (Kolenda, Liu 2012). Finally, a relatively permanent feature of creative industries is their geographical location. In contrast to manufacturing, which can be transferred from country to country wherever labour costs are the lowest, CCIs cannot be just cut off from one place and moved to another. Empirical analyses from all over the world confirm that access to cultural facilities, like museums, theatres and galleries and also to cafés, bars, restaurants, or clubs, is as important to ensuring the operation and development of CCI firms as reliable public transport and a low cost of office rental (Newbigin 2010). The accessibility of those facilities is significant because they operate as informal meeting places (Drake 2003). According to Currid (2007), this type of behaviour is not so much necessary to establish contact with contracting parties, but rather it is the lifestyle of CCI entrepreneurs.

Location decisions of owners of CCI enterprises depend on many factors. Putting it simply, Smit (2011) regards them as a function of the following four variables:

1. objective visual features of a neighbourhood or district,

2. creative entrepreneurs' subjective perception of the importance of these objective visual features of the district for their firms,
3. basic characteristics of creative firms, such as their size and growth stage,
4. the local context, e.g. the presence of CCI clusters or research centres within the city region.

The above list departs from that of location factors of enterprises traditionally described in the literature on the subject and may seem somewhat incomplete, hence it requires a few words of explanation. Worth noting is the intentional omission of certain factors often mentioned when discussing the location of enterprises, like institutional facilitation or skilled labour resources. True enough, the location of firms and the availability of skilled workers are still strongly connected (Takatsuka 2011), but this dependence loses in importance when location decisions are made by micro- and small businesses. Besides, in this case the location is considered decidedly more often only at the lowest level of detail, when an entrepreneur seeks a suitable lot or premises for the seat of his firm within his city. That is why factors like tax relief and the policy of local authorities are of marginal importance. Also, the locational behaviour of CCI entrepreneurs is usually based on opportunities offered (opportunity-driven locational behaviour), which means making location decisions on the basis of opportunities that entrepreneurs can see (e.g. the possibility of cooperation with other firms in a cluster), unlike locational behaviour based on problem solving, e.g. access to physical infrastructure (Stam 2007).

Besides, one should clearly distinguish between a perceived (behavioural) environment and an objective one. The perceived environment is part of the objective one, and it is created via information signals received and interpreted by one's perception mechanism. Only a limited part of information coming from the objective environment is actually received and provides a basis for intentional behaviour (Lloyd, Dicken 1972).

The specificity of work in CCI enterprises implies their fairly free location because the creative process largely involves thinking, drafting, designing and conducting talks, partly via digital media. This means that location choices are much less limited than in firms connected, e.g., with construction or industrial production. What is interesting, however, is that CCI entrepreneurs, not

bound by anything, seem to have reached a place paradox: they can locate 'everywhere', but at the same time the quality of a place is increasingly significant in their location decisions (Smit 2011).

The attributes of a place where a firm is seated provide suggestions, ideas, signs or inspiration which can act as catalysts in the designing process (Drake 2003). The subjective, personal or emotional response of a creative worker to a place will affect the way in which he uses its attributes as an aesthetic inspiration, and his response will be moulded by his individual identity, imaginings and opinions. Thus, designers and artists have their highly personalised perceptions of a place and their own sense of identity connected with it. Those subjective and imagined places will provide a stock of suggestions, signs and symbols equally, if not more, important than the actual or objective picture of the place. Artists and designers can create products in which the place or place-inspired elements are part of the product. It is also possible to conceive circumstances in which those products, in turn, contribute to the moulding of actual places, street art being an example (Drake 2003). In some measure that is why CCIs are still so strongly associated with a place.

As unique sets of social interactions between creative individuals and organisations, distinctive city landscapes offer both opportunities and restrictions for building an exceptional creativity space (Granger, Hamilton 2010). Helbrecht (1998) found that CCI firms often chose a location guided by the look of a building, district or city. The study of CCI clusters in Singapore, London and Vancouver conducted by Hutton (2006) also demonstrates that the quality of built-up land is of fundamental importance for many CCI entrepreneurs.

A wider analysis of the effect of the visual attractiveness of an area on location decisions of CCI firms was made by Smit (2011). She found that CCI entrepreneurs regarded the characteristic look of a district as one of key location factors. This especially concerns architectural quality perceived as something more than merely beautiful buildings: the originality of architecture, a variety of sizes, the right style, and use of various materials. Such architectural aspects contribute to the sense of uniqueness of the general look of a district, which makes it an attractive place

Table 2. Phases in the development of an enterprise and processes predominant in them.

Development phase	Predominant process taking place in enterprise
Start-up	Opportunity recognition and resource mobilisation
Initial survival	Resource generation (creating and delivering value, capturing returns)
Early growth	Surplus resource generation/opportunity recognition
Reversal (growth syndrome)	Detraction of (tangible and non-tangible) resources
Accumulation	Resource accumulation

Source: Stam (2007: 31).

for work. Smit (2011), however, tried to establish why the distinctive visual character of the district in which the seat of a firm was located had any significance for CCI entrepreneurs. The most unexpected reason, considering those known from the literature, turned out to be the fact that an exceptional look of a district made it attractive to customers, who visited it more readily. If customers are ready to come to the seat of a CCI firm, they are regarded as more open to its ideas and products than when meetings take place in a customer's seat. Secondly, a district that 'radiates creativity' by its characteristic external look boosts the image of a firm and the products and services it offers. The last reason was a wish to locate in an interesting place that could inspire and encourage work. For the same reason CCI firms avoided locations in office districts, places of concentration of business activities, or in the suburbs.

One should also remember that the spatial organisation of firms keeps developing since their start-up. A look at firms from the perspective of their entire life course makes it possible to examine the changing conditions that facilitate or hamper the locational behaviour of entrepreneurs (Stam 2007). To analyse the effect of the development of a business on its location, Stam (2007) distinguished several periods in its life course (Table 2). While the stages are presented in a sequence, this does not mean that they always follow this pattern.

It is worth emphasising that the life course of most micro- and small CCI enterprises differs from that followed by traditional firms. A decade of observations conducted in Great Britain has revealed that one in three new firms does not survive on the market longer than three years, which does not depart much from indices recorded in Poland (Newbiggin 2010). That is why the life course of CCI firms can be shorter, ending some time after the initial stages listed.

On start-up, entrepreneurs usually organise their seat near the place they live or near an earlier work. Because access to resources is limited and the start-up stage is subject to much uncertainty, better locations are usually not sought. When an entrepreneur has gained enough certainty as to his prospects in a branch, and enough resources for investment or access to financial means on the capital market, he can rent or buy a suitable place. In many cases the choice of a location is accidental, motivated by a low price or ready availability via personal relations. One should be aware that when location decisions are made very rarely, or perhaps for the first time in life in the case of start-ups, this lack of experience may mean a low quality of the decision taken (Lloyd, Dicken 1972). Besides, entrepreneurs tend to locate in their familiar quarters driven by three motives. First, entrepreneurship refers to local rather than universal opportunities because individual people have access to a variety of information, and entrepreneurs discover possibilities on markets that are known to them, probably near their old working and living milieux. Secondly, since the firm will not generate any profit yet, the choice of a location can depend on personal motives and personal networks, including family members, friends, and co-workers. Thirdly, owing to limited financial resources, the range of locations worth considering is highly limited (Stam 2007).

The stage of initial survival marks the start of the process of resource generation. This can make the present location of a firm no longer functional, which implies the need to find a new one. According to Stam (2007), the search for it is controlled by three mechanisms. First, the entrepreneur is still the most important actor in the firm, and his personal and professional lives are closely interconnected, which means that personal motives and personal networks allow him to find a new location thanks to information supplied by network members. The second mecha-

nism involves the dependence on key customers who account for a major part of the firm's sales and who can have a significant influence on its spatial organisation. Those customers prefer the firm to stay in the same old place for such reasons as the possibility of cooperation and the organisation of face-to-face meetings. In the case of a local activity, this aspect is of special importance because the operation of the firm relies on direct contact with the customer – the recipient of the goods offered. The last factor decisive at this stage is the means generated that can expand the range of investment opportunities, and thus stimulate a change in location (Stam 2007).

The early growth phase is full of locational dynamics. Its characteristic feature is the need for an additional space as a result of an increase in employment. Most firms succeed in expanding in their home region because this allows them to keep workers and find cheaper premises. What is characteristic of the stage of reversal is the lack of change in the spatial organisation of the firm because it focuses on problem solving and getting out of an uncertain situation. At the accumulation stage, in turn, locational initiatives usually rest on possibilities, but they may also be prompted by a shortage of office space. Relocation decisions are taken with care, especially in the case of businesses that have invested in infrastructure, because the costs incurred can be hard to recover (Stam 2007).

The last factor controlling location decisions of CCI entrepreneurs, after the characteristics of the firm, is the local context, especially the presence of CCI clusters in the city. Creative spaces, also known as cultural quarters, that are a sort of informal CCI clusters, began to appear in the United States in the late 1970s and in Europe in the mid-1980s. They were often started by individual artists occupying empty buildings of factories and warehouses in declining industrial districts, encouraged by their low rent and poor control by officials (Evans 2009). Today a cultural quarter is defined as the part of a large city in which groups of buildings have been designed on purpose for, or adjusted to, cultural and artistic industries in order to create a sense of identity and conditions facilitating and encouraging those activities (Roodhouse 2006). Numerous studies corroborate that downtown locations and post-industrial facilities are still preferred by rep-

resentatives of the creative circles looking for a place to work because they regard old industrial buildings highly and feel connected with their historical connotations (Heebels, van Aalst 2010; Kolenda, Liu 2012).

Even in branches that create technologies for distance work, chief business activities often concentrate in relatively small geographical areas. Technology, despite earlier declarations, has failed to separate work from space (Neff 2005). The geographical proximity of firms within a housing estate, a district and a city can support cyclic cooperation and interrelations in the fields of both finance and ideas, especially in innovative branches and advanced technologies (Neff 2005). Therefore, co-location is regarded as a dominating spatial pattern in the CCI sector. Its economic entities have a much stronger tendency to group than those in other branches of the economy because of the predominance of micro- and small enterprises here. This type of firms show elasticity, but also have to cope with such problems as more difficult access to technological information, limited resources, and high costs of training. The clustering of the activities of many firms is advantageous in such matters as improved efficiency, and hence in gaining a competitive advantage (Champion 2010).

According to Polèse and Shearmur (2004; after Champion 2010), a precise list of conditions that a creative space has to meet is almost impossible to define, but an agglomeration is decidedly a necessary condition. There are clear advantages for CCI enterprises that a location in an agglomeration-scale city gives them, including institutional support, a big labour market, and consumer demand. Large urban areas offer several supplementary services and the support of institutions connected with training, research and finance. Substantial local resources of creative and skilled labour are advantageous for both, firms and workers. Besides, they are often considered a key to success in work on a project. The closeness of persons possessing human capital, skills, knowledge or creative abilities allows interactions and mutual influence, which is of key importance for innovation (Champion 2010). Geographical proximity offers more occasions for face-to-face contacts and an informal exchange of knowledge. Those contacts can be planned, but they are often spontaneous. Thus, clusters facilitate non-formal-

ised flows of ideas, advice, and strategic information. Many synergetic effects and advantages are generated, transforming a cluster into a CCI pole (Heebels, van Aalst 2010).

Firms that locate in CCI clusters can make use of a local bank of talents and, due to the effect of scale, have easier access to financial capital (Heebels, van Aalst 2010). However, a creative space is significant not only because it provides economic opportunities, but also because it helps to preserve the cultural heritage and to promote art (Zielke, Waibel 2014).

In sum, the presented location factors seem to have the greatest effect on decisions of CCI entrepreneurs. However, the out-of-the-ordinary nature of activities carried out in the CCI sector also manifests itself in difficulties with the determination of places where they are conducted. There are reasons to believe that creative people, even more often than others, make decisions in accordance with a behavioural orientation in which they tend to seek satisfactory solutions rather than optimum ones. And in the division of decisions into satisfactory and unsatisfactory, the key factor is the level of aspiration of the decision-maker. The aspiration level is very hard to measure, since it includes such variables as age, personality traits, socio-economic status, or the approach to risk. It is also variable in time for individual persons (Lloyd, Dicken 1972). All this makes it impossible to speak of one location model within the CCI sector (Stryjakiewicz 2010).

Models of the location of CCI industries

Apart from different tendencies in the location pattern of individual creative branches, there are also various tendencies in their clustering. Production-related industries are the most concentrated ones at each spatial scale, while consumer-oriented or final-user ones show the greatest dispersal (Power 2011). Concentration measures clearly show that the most concentrated CCI branches are those involved in specialised production or publishing, computer games, the production of TV programmes, and video recording. In turn, the least clustered industries are those closest to the consumer in the value chain: exhibition rooms and theatres, or business-related ser-

vices of which other branches make regular use: photography, advertising, architecture, etc. Such industries do not show a tendency to cluster at the supra-national level, but their concentration is more readily visible within a region or locally, at the level of a trade district or a cultural quarter (Power 2011).

The chief reason for the division of CCIs into clustered and dispersed ones is the fact that they differ in their spatial behaviour patterns. In addition, this question seems to be somewhat neglected in the literature on the subject. Many authors strive to work out an excessively unified model of the location of creative and cultural industries, or they divide them according to criteria relatively insignificant from the point of view of their location pattern and tendency for clustering, e.g. into traditional and non-traditional branches (Lazzeretti et al. 2008; Boix et al. 2013). But the geography of CCIs is highly complex and hard to describe using a single model.

Therefore, we propose two CCI location models: of concentrated production and of dispersed production (Fig. 4). The first refers to the locational tendency of clustered activities, and the other, of dispersed ones. It should be kept in mind, however, that the two models illustrate extreme situations that can be considered fully adequate in the case of the most clustered and the most dispersed industries, e.g. video and computer games, and photography, respectively.

The model of a concentrated production network assumes that clustered industries tend to concentrate at all spatial scales by grouping in selected centres and are connected by links of various intensity. Thus, both aspects are significant: a strong tendency to gather in some areas and form clusters, and the development of links as manifested, e.g., in active cooperation and flows of information, knowledge and innovation. This is the situation presented in Fig. 4a. At a macro-scale, the production of the given commodity takes place in only some centres, an example being the production of computer games or films, only located in a few regions of the world. In turn, a closer look at individual centres reveals that the activity conducted within them also shows a tendency to concentrate and form clusters, this time at a smaller scale (e.g. urban or local).

An inspiration for the model of a concentrated production network was provided by two con-

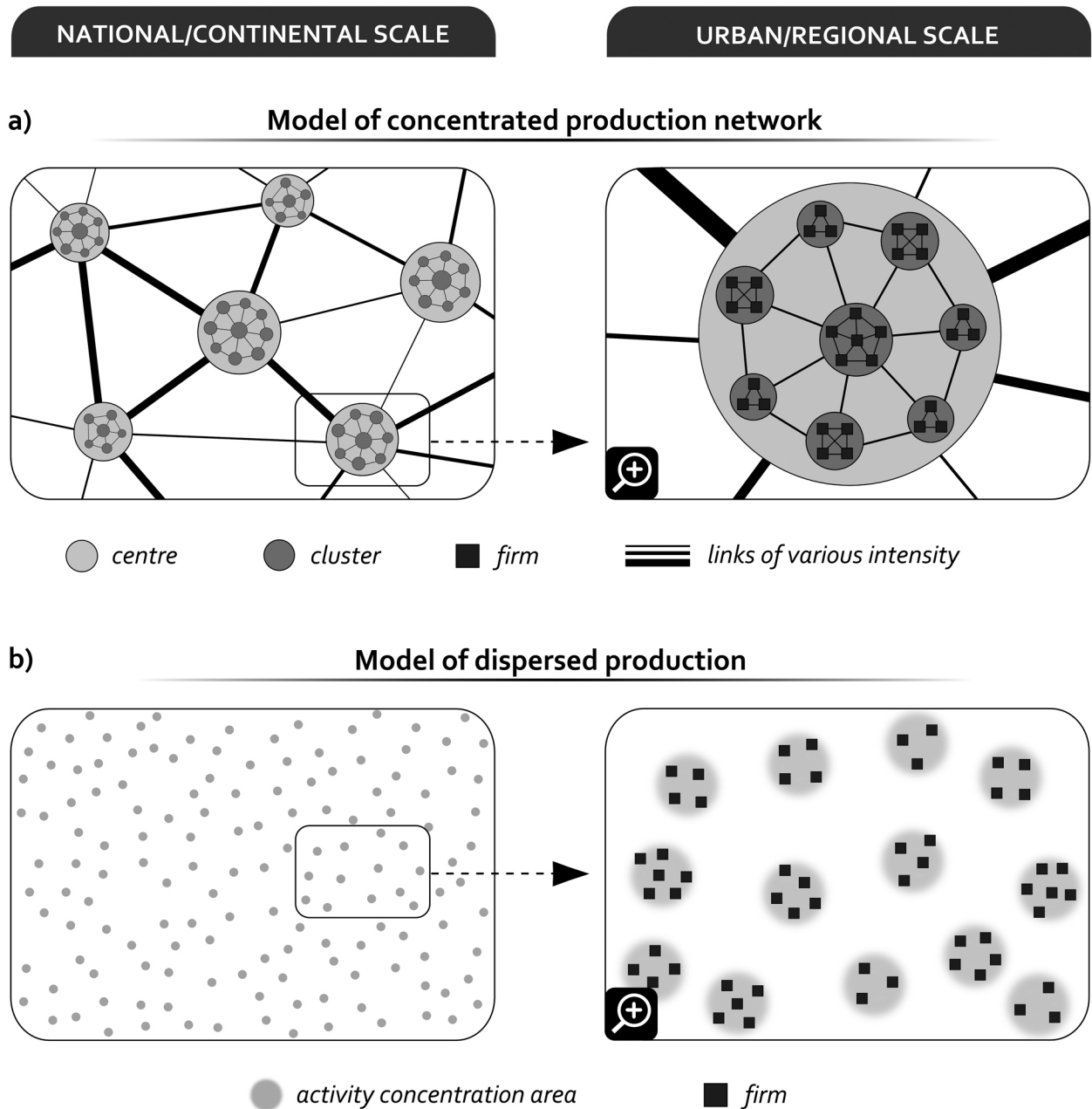


Fig. 4. Location models of creative industries: a) the model of a concentrated production network; b) the model of dispersed production.

Source: own compilation.

ceptions: that of creative local production systems (Lazzeretti et al. 2008) and of a social network (Gordon, McCann 2000). The model shows that creative branches tend to group in specific places called creative local production systems. It is emphasised that only clustered industries show this tendency. Besides, the entire activity takes place in a network structure. As Grzeszczak (1999) claims, network systems are going to become a dominating organisational form of the economy in the nearest future because complex networks of

mutual links of various strength are an especially effective way of organising production chains. In the case of some creative branches, it seems that the network structure has already become a typical form of their organisation owing to the role performed in them by cooperation links and trust as well as information and knowledge flows.

In addition, as Korenik (2009) observes, it is a specific feature of a network organisation that the potential accumulated in networks is absorbed only in some centres, usually large modern cities.

Besides, the formation of a network in the economy is a selective process, i.e. one taking place with various intensity at individual points of space. Only areas in possession of suitable resources of knowledge, human capital and creative capital have a chance to become nodes in a network, and consequently, leaders in socio-economic development. The new structure of space that forms in this way displays a considerable discontinuity: apart from centres where economic activity, including the creative kind, accumulates, there can also be areas that the network does not embrace and that draw no benefits from the developments occurring there (among other things, the synergy effect).

Different tendencies in the location pattern and concentration of creative industries are presented by the dispersed production model referring to dispersed industries. It assumes that those industries are distributed fairly evenly in space. A good example is photography, which can be found in each town and city quarter and on almost every housing estate. It is worth noting that where the population density declines, there will be fewer points of activity too. Besides, although at a macro-scale (e.g. of an entire continent) industry concentration areas are distributed almost evenly, at the scale of a city or region the concentration of firms will be greater (Fig. 4b). This means the clustering of this type of enterprises in all towns and other larger settlement units where the population – potential customers – has reached a certain number making it payable to locate an activity there. In addition, for each dispersed industry the point at which the critical mass of the population number has been surpassed may be different. For example, although a library can be found in every small town, in order to see a theatrical performance one has to go to a larger town or city. Generally, however, for each dispersed industry deconcentration forces predominate over those of concentration, as demonstrated by their spatial distribution resulting in the dispersal of production.

However, in no way should the presented model of dispersed production be confused with the spatial fragmentation of a production chain. As Mudambi (2008) states, the geographical dispersal of the creation of value has recently started to play an ever bigger role in analyses of creative branches. At the macro-level, value chains of

individual firms combine in a network of complex relations (among other things, mutual complementarity) in order to create “value constellations” of CCIs (Normann, Ramirez 1993). The fragmentation of value chains is intended to bring about their increasing spatial disaggregation into individual parts. As the present location tendencies show, industries with a high value added are mostly set up in advanced market economies, while those with a low value added locate in developing economies. However, this pattern is affected by forces from three separate processes. First, firms from emerging markets tend to develop expertise in industries with a high value added. Secondly, firms from advanced market economies tend to exclude activities with a high value added from the production chain and to cut costs by transferring them to developing economies. This process of the spread of creative industries is additionally reinforced by some goods coming out of use, which creates pressure to relocate the declining branches (Mudambi 2008). And the dispersed production model presented above does not deal with the question of fragmentation of production chains at all.

To sum up, it should be emphasised that the two models of CCI location are complementary rather than mutually exclusive. This means that both model structures can exist simultaneously in the same area, overlapping. However, because they are formed in space by quite different industries, there is no collision between them.

Models of the market range of creative and cultural industries

Value chains of creative goods and services develop in a variety of ways. Although some of them can form spontaneously, usually it is a proper combination of suitable socio-economic conditions that allows exceeding the critical mass of CCI enterprises and attracting the global consumer. Examples include such world-scale branches as crafts in southern China, the programming industry in Beijing and Bangalore, and the production of soap operas in Bogotá, Caracas, Mexico and São Paulo (UNDP, UNESCO 2013). However, in the recent years there has been a shift from a unified national economic space towards more fluid and multi-layered spatial levels

of consumption. This reflects an increased awareness of a new dynamics and the intensity of global mobility – of capital, people, knowledge, and things (O'Connor 2007).

Thus, the range of the market of creative goods and services can extend from a local to a global scale, so we divided CCIs by the criterion of the market range into local and global industries. Although this division was presented in Section 2, it is worth reminding that local and global dimensions are treated here as a continuum, not as a hierarchy of separate scales. As Domański puts it (2004: 180), “it is impossible to tell where one scale ends and another begins”. Generally, however, the wider the range of the market of a creative commodity, the higher the potential profit. Hence creators within a local industry strive to expand the market for their products and reach the global customer. An example of helping those branches to shift from a local to a global scale is the promotion of the mobility of European artists and creators of culture intended to ensure their presence and recognition in the various parts of the world (EC 2010).

Since the 18th century, the CCI market started to expand gradually beyond the local and the national range. A work of art became a commodity that had a value and could generate a profit. The end of the 20th century saw mass education along with growing spending power and disposable leisure time which, combined with many technological and business innovations, gave rise to a new wave of cultural production and consumption (O'Connor 2007). Culture and consumption became increasingly significant for the dynamics of the global economy of that time, which was usually taken to be explained by Engel's law. Its creator was a German economist, Ernst Engel, who put forward the thesis that the part of personal incomes spent on cultural commodities and services as higher-order goods grew faster than the incomes themselves (Flew 2013). A consequence of Engel's law is a positive correlation of cultural consumption with economic growth and development. This would also agree with Maslow's conception of the hierarchy of needs, the chief assumption of which is that people seek higher-order goals connected with self-actualisation, intellectual questions and creative and artistic stimuli only after they have satisfied their basic needs (Flew 2013).

The new model of mass consumption caused a growing commercialisation of art. There appeared new branches deriving from high art. Film was a form of theatre adapted to the mass recipient, popular music, of opera, and popular literature, of belles-lettres. It was only in the late 1980s that economists started to talk of a shift from mass production to flexible specialisation and post-Fordism. Predictable patterns of mass consumption gave way to smaller niche markets. There appeared alternative goods and services that had a higher symbolic content and could appeal to new ways of constructing social identity away from the mainstream. The response to those new consumer markets was a faster flow of more detailed information back to the producer and the ability to adjust to a dynamically changing demand through a more flexible production process (O'Connor 2007).

Today the creative economy serves consumers whose demands ultimately determine what is being produced and distributed. Demographic changes and new distribution technologies bring about considerable changes in the structure of culture consumption all over the world, both in advanced and developing countries. As societies grow older, there is an increasing number of seniors who have a lot of free time at their disposal as well as enough means that can be spent on the consumption of various kinds of culture. At the other end of the demographic scale are young people, who make up a sizeable consumer group on the market of creative goods and services. It is mostly their choices that affect lines of production within the creative sector in many countries (UNCTAD 2010).

A challenge for creative goods and services is the so-called 'nobody knows' syndrome: the value of products manufactured in the creative sector for individual consumers is only known after they have been used or experienced (Caves 2000; DCMS 2007). But even then their worth may not be possible to assess objectively. This is so because CCI commodities depend on the sublimation of tastes of their recipients to a greater extent than products of other socio-economic activities. However, a big role is also played by popularity, which makes individual choices be dominated by opinions and information from community networks and by suitable promotional measures rather than by innate preferences or price signals (Flew 2013).

Thus, consumers are not aware of their true tastes. Rather, they discover them via repeated experience in a sequential process of non-systematic learning through the consumption of creative goods and services. Since there are a great variety of creative offers, the discovery process can in reality be infinite. Since people are not sure what they like, producers of this type of commodities try to anticipate and boost their market value (DCMS 2007). That is why what chiefly distinguishes the CCI sector from other branches of the economy, apart from the fact that it largely rests on non-material values, is that its markets are always emerging ones, while the markets of the other sectors can reach maturity (Flew 2013).

The shelf life of cultural commodities and services is very short because people constantly want new and different products. Although they are costly to produce, they are often cheap to reproduce. Hence, the more copies sold, the greater the return on the original investment. A commodity is therefore widely promoted in order to maximise income before it gets old (O'Connor 2007). According to some researchers, this type of cultural consumption leads to its homogenisation. This, in turn, limits consumer choices on niche markets, which are ignored because they are not profitable in economic terms. This process can contribute to a lowering of the level of culture and loss of the native cultural heritage (Anheier, Isar 2008).

However, what can be a counter-measure is the Internet, which is able to aggregate consumer demand from all over the world, thus also lowering the costs involved in the storage of niche offers. For example, the assortment of music available in an average music shop is no match for the 26 million positions available in the iTunes Store (2012 data). This is especially important in the case of niche commodities, like e.g. the adventure game *Broken Sword*. While it is not remunerative for shops to offer it, in 2011 it was downloaded from the Apple App Store 4 million times (Bakhshi et al. 2013). Still, it should be kept in mind that there are also limitations, because only a part of creative goods undergo digitisation. Besides, despite the global nature of cultural creation, commodities are distributed via local regulatory systems. Some countries put taxes on individual commodities or restrict authors' rights. In addition, producers try to obtain direct

access to markets, if possible, so as not to have to go through distribution-related intermediaries and "gatekeepers" (Pratt 2008).

The differences in the ranges of markets for commodities and services produced by individual creative branches caused the division of CCIs into global and local ones mentioned earlier because, despite the advancing globalisation, not all creative goods are able to attract the global consumer. As has already been said, the wider the range of the market of a creative commodity, the higher the potential profit, which stimulates the creators in all creative branches, including local ones, to expand the market for their products and services. However, in this case the chance to attract the global customer depends on fulfilling at least two conditions:

1. low commonality of the activity conducted,
2. the possibility of digitisation of the end product, or its distribution via the Internet.

Local industries usually have a high level of commonality. This means that they are available practically everywhere where the critical mass of the population number, i.e. potential consumers, has been exceeded, which allows a creator or entrepreneur to conduct an activity at a profit. For each creative branch the critical mass can be different. For example, although there can be dozens of bookshops or a few hundred architectural workshops in a big city, there will probably be at most one or two higher schools of an artistic profile. However, the notion of commonality should not be mistakenly taken as referring to the final product. It is obvious that the design of a house prepared by an architectural workshop, the offer of books in a bookshop, or the body of knowledge imparted during a course of study in an artistic school are examples of goods and services that are unique in some measure. One can hardly imagine two independent offices designing exactly the same complete projects, two bookshops offering exactly the same sets of books, and two schools with different staffs imparting exactly the same body of knowledge. That is why the effects of creative work within a local industry are unique goods and services, which does not mean that the activity leading to their production cannot be common.

The other feature of products of local industries is a limited possibility of digitisation. Thus, in most cases direct contact of the creator or an

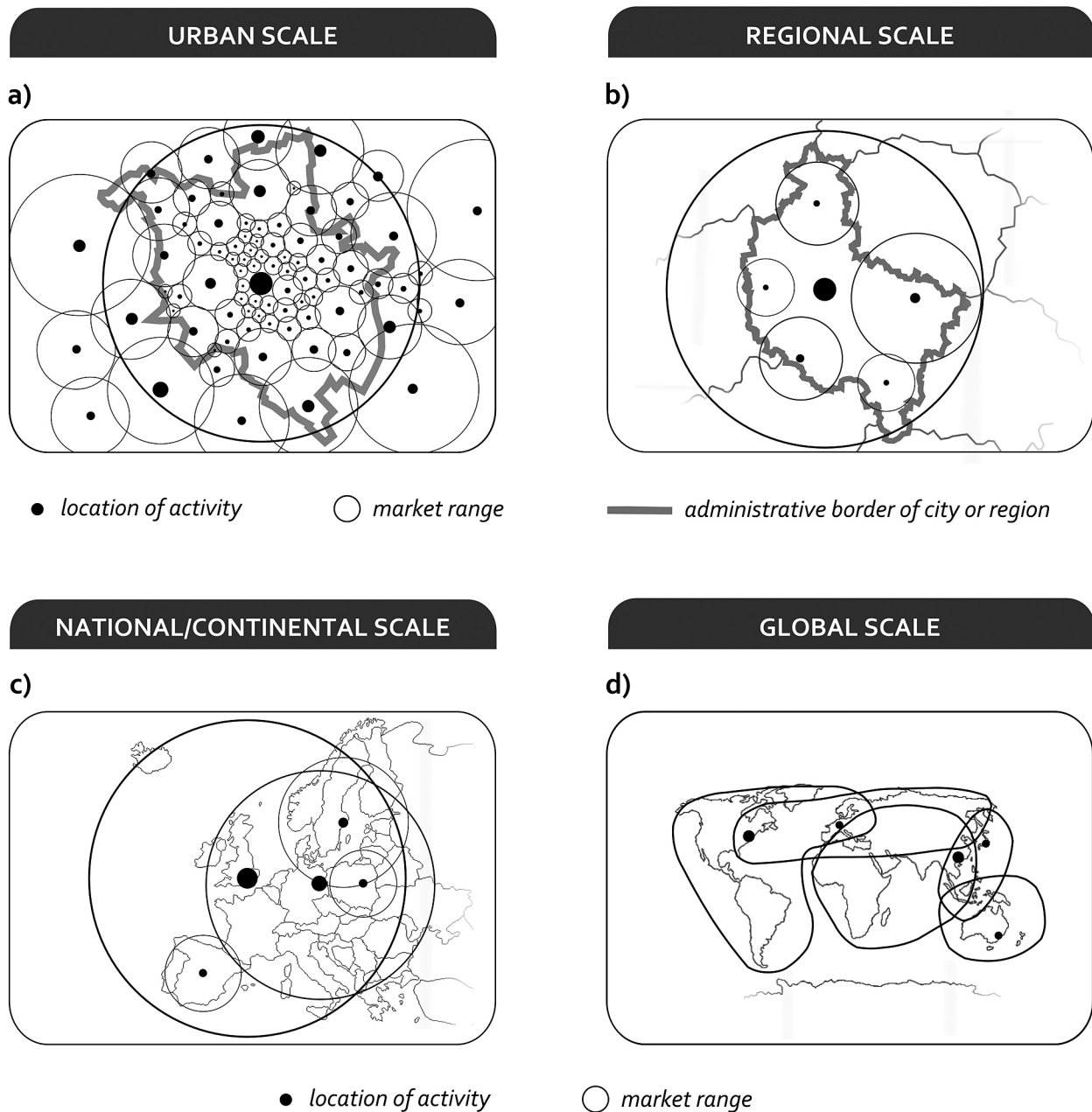


Fig. 5. Diagrammatic presentation of CCI market ranges.

Source: own compilation.

intermediary arranging the distribution of a commodity with its recipient or consumer is necessary. Naturally, there may be exceptions, an example being Web-based bookshops distributing their resources on the Internet. This is evidence that they have succeeded in expanding the range of their market and winning the supra-local customer. However, traditional bookshops usually have a small market range that extends only when they offer specialised resources, like bookshops affiliated with medical universities. Location points of local industries within a city along

with ranges of their markets are presented in a diagrammatic way in Fig. 5a. Although the market range depends on a lot of factors, it can be observed that the greater the density of location points, the smaller the ranges of their markets, an exception being more specialised points with a broader offer or of greater renown.

In turn, global industries show low commonality, film being an example. As stated in the previous section, film production shows a strong tendency towards spatial concentration and in effect it locates only in selected places. However,

in contrast to local industries, the market range of this branch, like other global industries, is practically unlimited. This means that the location of the recipient consuming or experiencing their products is completely unimportant. What is of key significance here is the possibility of the distribution of the products, also on the Internet.

The points of location of global industries across the world, together with their global market ranges, are presented in Fig. 5d. It should be kept in mind that the presented situation is a simplification. First, to make the diagram readable, the number of the location points was reduced, although in reality no global activity will tend to concentrate to this extent. Secondly, the market range covers the entire world, although there are isolated areas at the global scale to which the flow of creative goods and services is limited.

However, as has been mentioned earlier, in this article the local and the global dimensions are treated as a continuum. In consequence, it would be an oversimplification to claim that the situations presented in Figs 5a and 5d exhaust the entire spectrum of possible market ranges of creative industries. It should be observed that there are a lot of intermediate variants between the extreme cases. Hence Figs 5b and 5c also present CCI market ranges at the scale of a region and a country/ continent, respectively. No attempt was made to assign the situations illustrated in those figures to any group of creative industries. While by intuition a regional range of the market might be thought to be characteristic of some local industries, and a national or continental range, of global industries, in this paper we think that the market range is a complex question determined by many factors. There are many barriers to the expansion of markets of creative industries which embrace not only restrictions in international trade, but also questions of the language and culture. A significant role is also played by the development stage of an enterprise. In the initial stage, a firm in one of the global industries can hardly be expected to distribute its products or services on the domestic market, and even less on the global one. A more probable situation is the sale of products and services on the regional market and a gradual market expansion. Hence regional, national and continental market ranges are thought to be open to both, local and global industries.

Conclusions

The location models proposed above shed new light on the question of the location patterns of CCIs. In earlier works authors usually analysed the distribution of creative branches in a city, region, country, or continent without paying much attention to the fact that individual industries showed different tendencies to disperse or to concentrate. As a result, it was hard to make a comparative analysis of the distribution of CCIs in various areas. If mostly concentrated activities (which, as the model assumes, tend to cluster at all spatial scales) have developed in one city while dispersed ones predominate in another, a comparison of the two location patterns without an identification of branches can lead scholars to wrong conclusions and incline them to seek dissimilar reasons for the evolution of those different structures in the two cities. However, the proposed models – of a concentrated production network and of dispersed production – can provide an answer to such questions as why there are differences in the distribution trends of the activities discussed. We have demonstrated that individual creative branches show different tendencies to disperse or to concentrate. Activities most heavily concentrated at each spatial scale are those connected with production, while the most dispersed ones are those oriented towards end users. The situation is similar in the case of the spatial aspect of CCIs – the range of their markets. On the basis of differences in the market ranges of products and services generated in individual creative branches, we proposed a division of those activities into global and local ones. This division allowed us to observe that individual creative branches could affect the socio-economic reality of a city or region in a variety of ways. This is connected with the conception of an economic base, according to which economic activities conducted in a city can be put into two basic groups: exogenous (of supra-local significance) and endogenous (serving the local market). It is commonly assumed that exogenous forms of activity contribute to the construction of an economic base enhancing the development of the city. They provide a measure of the openness of the city to the outside and its links and interrelations with other cities. In terms of creative activities, it would be impossible to determine

which of the functions they carry out is the more important one. It is only the division of the activities into global and local ones that makes it possible to identify their function. Thus, global activities perform an exogenous function, and local activities – a complementary endogenous one. The realisation of this simple dependence provides an answer to the question of which creative branches are worth special attention when preparing growth strategies based on the development of the creative sector in order to achieve the effect intended. This can be of key significance for a city's authorities and decision-makers planning development-oriented measures.

In sum, over the last years creative activities have increasingly been an object of interest to scholars, who, however, have a tendency to ignore their spatial aspect. But space-related processes can be a chance for some local economies and a threat to other ones. It is therefore incorrect to disregard spatial aspects when examining even those activities that hardly seem to have a spatial context, like the creative branches, especially Internet-based ones. That is why we think it is necessary to conduct further research on the spatial and locational determinants of the development of the creative economy.

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