DISTRETTO PRODUTTIVO
PUGLIA CREATIVA

PUGLIA CREATIVA AND FONDAZIONE SYMBOLA

Presentation of the report "Creative in Puglia
The numbers and the report on cultural and creative enterprises in Puglia".

Art, design and beauty are becoming more and more tools for the competitiveness of every industry, for all sectors. CCIs are drivers for the growth and development of the territories, they create employment for young people, women and grad students.

- ## Apulia highlights:

- *Apulian industries are growing more then twice the national average*
- *The added value represents 4.2% of the regional richness, the employment 4.3%*
- *Bari is the leader at the national level: the city ranks 5th in the communication and branding sector, 8th in the performing arts sector*
- *Taranto ranks 10th in the performing arts sector*

In 2017, the added value of the creative and cultural productive system in Apulia **represented 4.2% of the whole produced regional richness**; 1.8% less then the national average. The employment percentage reaches **4.3% (2.756 employees)**.

However, the regional data hide some differences resulting from the territorial variety. **Bari**, the main town, has the best results, contributing to almost half of the regional creative and cultural added value (**5.3% of added value and the provincial employment**). On the contrary, Foggia has the worst result: 3.2% of the whole local richness; slightly better percentage for the employment (3.5%).

The most relevant data is that **the structural delay of the Apulian Cultural and Creative Productive System has significantly reduced**, with better results on the national averages of the richness produced and the employment.

Compared with the 2011, the **added value of the Apulian industry scores an average annual increase of +1.5%, twice the national average. Among the provinces, we see the most relevant results for the city of Bari (+2.4%) and Brindisi (+1.9%), and the biggest difficulties in the city of Taranto, the only one with a negative result (-0.1%)**.

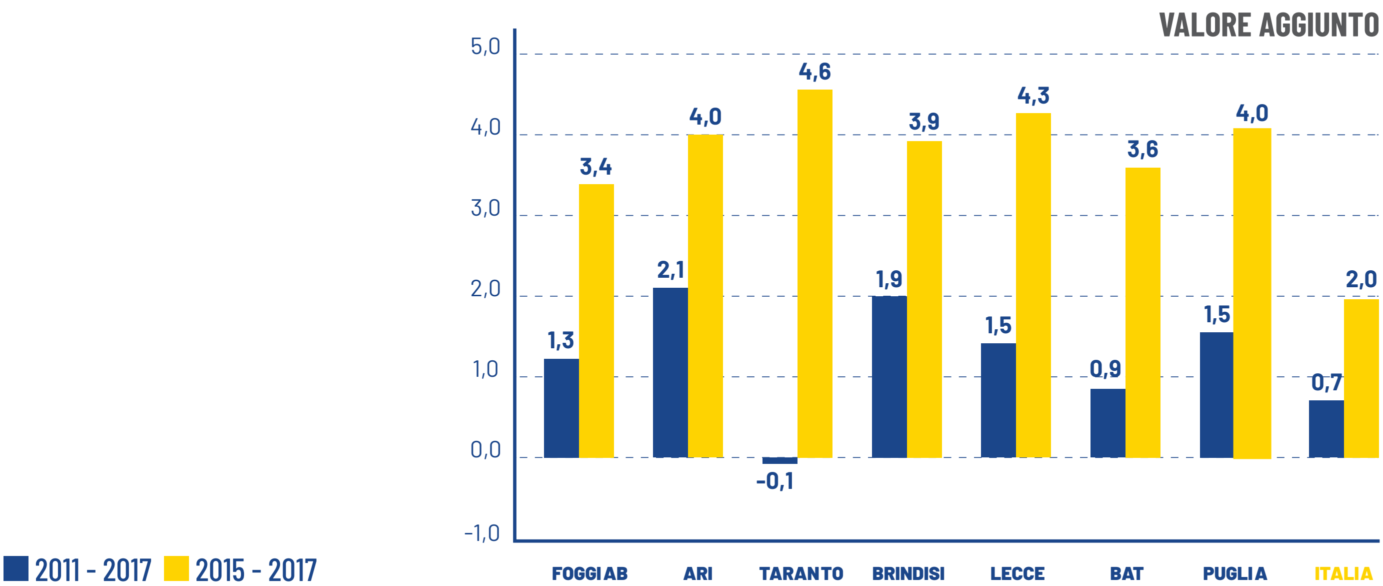
Similar remarks for the employment trend: the annual average growth has assessed at +1.0%, six tenths more than the national rate. Similar to the added value performance, the Apulian score has improved thanks to Brindisi and Bari's performances (+1.3% and +1.4%). Although, Taranto has registered an annual contraction: an average of -0.3%.

TAB. 1

Added value of the Cultural and Creative Production System in the Apulian provinces and growth dynamics. Years 2011-2016-2017 (absolute values and percentage incidences on the total economy).

Source: Fondazione Symbola-Unioncamere

ABSOLUTE VALUES			
	Added value (millions euros)		
	2011	**2016**	**2017**
Foggia	289	297	307
Bari	1.141	1.216	1.265
Taranto	309	294	308
Brindisi	199	210	219
Lecce	439	452	472
Barletta-Andria-Trani	178	179	185
PUGLIA	2.554	2.650	2.756
ITALIA	89.198	90.465	92.250
PERCENTAGE EFFECTS ON THE WHOLE ECONOMY			
	Added value		
	2011	**2016**	**2017**
Foggia	3,1	3,1	3,2
Bari	5	5,2	5,3
Taranto	3,3	3,4	3,5
Brindisi	3,1	3,2	3,3
Lecce	3,9	4	4,1
Barletta-Andria-Trani	3,4	3,4	3,4
PUGLIA	4	4,1	4,2
ITALIA	6,1	6	6



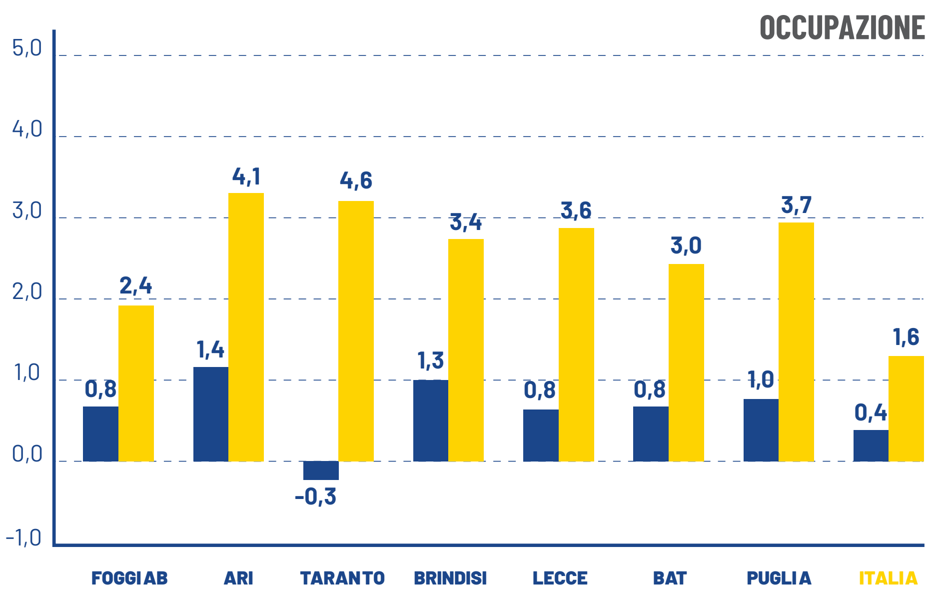
TAB. 2

Occupation of the Cultural and Creative Production System in the Apulian provinces: absolute values and growth dynamics.
Years 2011-2016-2017 (absolute values and percentage incidences on the total economy).

Source: Fondazione Symbola-Unioncamere

ABSOLUTE VALUES			
	Employment		
	2011	2016	2017
Foggia	6.672	6.790	6.955
Bari	23.343	24.069	25.063
Taranto	7.424	7.028	7.308
Brindisi	4.202	4.325	4.472
Lecce	10.968	11.009	11.399
Barletta-Andria-Trani	4.475	4.525	4.662
PUGLIA	57.084	57.746	59.859
ITALIA	1.488.353	1.495.784	1.520.172

PERCENTAGE EFFECTS ON THE WHOLE ECONOMY			
	Employment		
	2011	2016	2017
Foggia	3,4	3,4	3,5
Bari	5	5,2	5,3
Taranto	3,9	3,6	3,8
Brindisi	3,2	3,3	3,4
Lecce	4,2	4,1	4,3
Barletta-Andria-Trani	3,6	3,5	3,6
PUGLIA	4,2	4,2	4,3
ITALIA	6	6	6,1



2011 - 2017 2015 - 2017

The medium period trend is strengthened by this last year data. In one year (between 2016 and 2017), the added value produced by the Apulian Cultural and Creative System has grown by 4%, twice the national data (+2%). This progress is supported by Taranto (+4.6%) and Lecce (+4.3%) particularly, even if all provinces are reaching a better growth rate than the national one. The same for the work force employed. The number of employees in ICCs has registered an increase of +3.7%, compared to +1.6% at the national level. The leaders in this growth are Bari and the province (+4.1%) and Taranto (+4.0%), recovering from the negative trend in the last years.

2 In line with these good ratings, **Bari and its province has the leadership rating in several sectors at national level**. In communication and branding sector **it is 5th over 110 provinces**, in terms of added value and employment. The **performing arts** are good in Bari too, ranking **8th for the added value** and 18th for employment.
The **Audio-visual sector (movies, videos, radio and tv) ranks at 12th position** for the added value and 15th for employment, and also the little software, games and videogames area has a good result in the province (20th position for the added value and 26th for employment).

But **there are some excellence niche industries in the rest of the region** that affect this hegemony. So as for the **performing arts**, in which **Taranto** and its province has the best performance (**10th** for the added value and 17th for employment); Brindisi and Lecce has good results too (respectively 32th and 33th for the value added; instead, Barletta-Andria-Trani has better performance as regards communication and branding (15th and 26th).

TAB. 3

Positions of the Apulian provinces in the rankings of the sectors of the Cultural and Creative Production System.
Years 2011-2016 (average annual percentage changes).

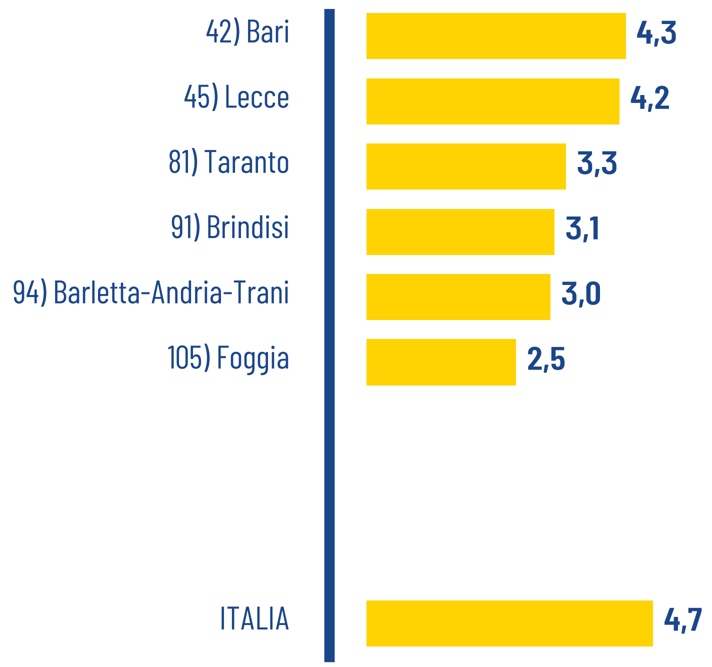
Source: Fondazione Symbola-Unioncamere

ADDED VALUE (MILLION EUROS)						
	Foggia	Bari	Taranto	Brindisi	Lecce	BAT
INDUSTRIE CREATIVE	95	42	104	102	61	69
Architettura	96	90	106	104	52	101
Comunicazione e branding	61	5	94	86	36	15
Design	103	75	82	89	66	69
INDUSTRIE CULTURALI	81	27	91	82	57	75
Film, video, radio e tv	50	12	36	43	63	32
Software e videogames	95	20	84	77	52	87
Musica	84	69	73	63	43	91
Editoria	66	69	95	88	46	70
PERFORMING ARTS E ARTI VISIVE	80	8	10	32	33	54
Performing arts e arti visive	80	8	10	32	33	54
PATRIMONIO STORICO-ARTISTICO	56	61	81	64	65	72
Patrimonio storico-artistico	56	61	81	64	65	72
TOTALE CORE CULTURALE	93	26	84	87	60	76
CREATIVE DRIVEN	99	29	87	96	72	101
TOTALE SPCC	99	26	87	95	63	89

TAB. 4

Positioning of the Apulian provinces by incidence of core cultural enterprises in the national ranking. Year 2017 (percentage incidence on the totals of local economies)

Source: Fondazione Symbola-Unioncamere



3 In the last five years, we can see a progressive **strengthening of the entrepreneurial basis**. Apulian ICCs are going towards the more structured legal from of the **capital society, which is registering an annual growth of +4.7%**. On the contrary, there is a general reduction of other categories. This is a key element because the choice of bigger more capitalised and with an easier credit access enterprises leads to the increase of the whole cultural and creative system. This phenomenon has concerned all cultural and creative branches: today, capital societies represent a quarter of the enterprises in the sector (2.988 enterprises, as the 22%). But the most common legal form is the individual enterprises: the 61.3% in the cultural core, as 8.344 unities.

Moreover, in the cultural core enterprises with less than 3 employees represent 90.2% of the total cultural and creative entrepreneurial basis in Apulia.
The majority of micro enterprises reflects on the distribution of the revenues in the entrepreneurial system. 86.7% of the ICCs in Apulia produces an annual revenue below 100 thousand euros.

The biggest volumes, more than 1 million euro, are produced by 1.3% of the enterprises in the cultural core. Software, games and videogames industries own the biggest volumes of revenues (4.3%) together with video, movies, radio and tv (3.9%). But it is remarkable the performance of the industries of Artistic and historical heritage system: 5% of them produce a revenue of more than 1 million euro.

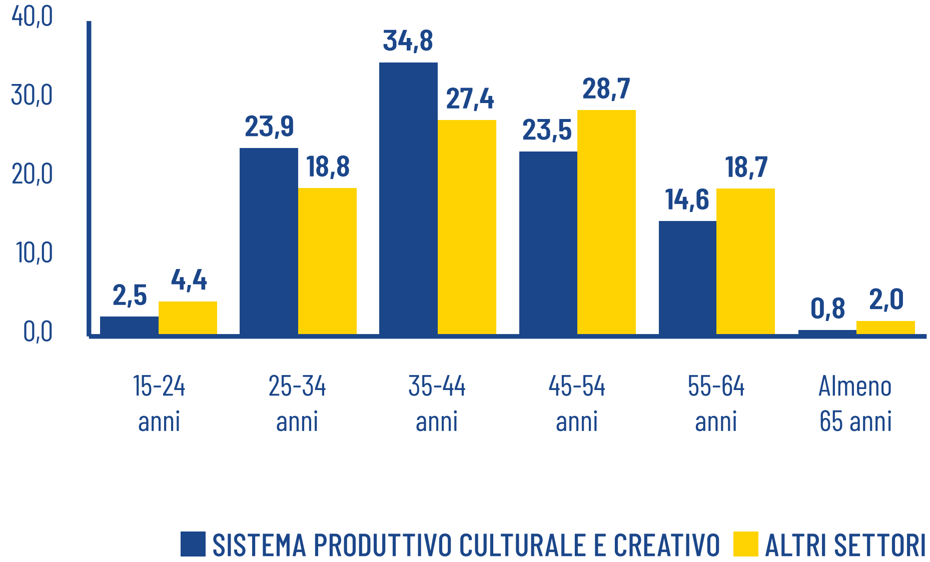
4 The major similarities between culture and new generations emerges by making a comparison between the distribution of the professionals by age range and the average of the Apulian economy. In **the range 25-34 years, the percentage of the**

employees in the cultural and creative sector is far highest than the one registered in the rest of the economy (23.9% versus 18.8%).

As regard the contractual terms, it is evident t**hat more than 1 out of 5 employees (21.1%) has a temporary contract, even if the graduated employees are 30% more than the total in the regional economy and 1.1% more the in the national average.**

TAB. 5

Composition by age group of active workers in the Cultural and Creative Production System in Puglia.
Year 2017 (percentage compositions).



Source: Fondazione Symbola-Unioncamere

5 The **average salary in the cultural sector** is 100 euros higher than the regional one (1.304 euros per month versus 1.209). The creative driven professionals score the best results (1.379 euros), whereas the cultural core registers a negative gap of about 63 euros in the average of the sector, but a plus 32 euros in the total of the Apulian workers. In the last six years, the income of the cultural professionals in Apulia has grown of 37 euros per month, which is in line with the whole regional economy (+39 euros).

6 In 2017, 229 **thousand shows were performed in the Apulian territory**. Even if they represent only 5.3% of the national total, they are a quarter of those produced in the whole Southern Italy. The trend recorded is substantially stable compared to 2016 (-0.4%), a figure that favors the region than the national level (-2.6%).
Contrary to what emerged last year, the number of participants in the events has recorded a significant decline (-10.4%), reaching 10 million entries. This has led to a simultaneous deterioration of the system's ability to generate wealth. Despite the average cost of the entry tickets remained unchanged (around 7.6 euros), the reduction in participation in the shows caused a reduction in the volume of business generated (-5.9%) which, in 2017, stood at to 188 million euros.

The fragmentary nature of the show's activities, while allowing a considerable territorial diffusion of the events, does not allow to activate high levels of spending

within the circuit. In fact, between 2011 and 2017, the number of shows produced recorded an average annual increase of + 1.6% with an amount of expenditure at the box office and a substantially stable volume of business (+ 0.3%). This is an opposed dynamic to that recorded at national level.
For this reason, the Region has allocated over 188 million for a three-year plan to support live entertainment, artistic residences and cultural activities, to promote long-term planning able to strengthen the entrepreneurial culture and the development of cultural and creative potential that Apulia has.
In Apulia **56 shows are produced per 1.000 inhabitants, a higher value than any other southern region, but still very far from the national average (71.6 shows per thousand inhabitants)** and almost half of what can be seen in the Marche (103.2), first classified region. **The same thing can occur with participation in the cultural offer. In Apulia, in 2017, the number of entry tickets was 2.506 per thousand inhabitants, higher than the southern average (2.276) but very far from the national summary analysis (3.978).**

7 The territorial disaggregation of the analyzed results makes it possible to highlight the different performances that characterize the five Apulian provinces.
In the provincial ranking Bari holds the record both in terms of the number of shows produced and the number of entry tickets placing respectively, at the 35th place (79 shows per 1.000 inhabitants) and at the 36th place (3.945 entries per 1.000 inhabitants). In terms of monetary revenue, it is still Bari to position itself at the top of the regional ranking with 29 euros per capita spending at the box office; second place belongs to the province of Lecce (74th place - 18 euros per capita). The gap existing with the values observed for the provinces at the top of the national ranking, is still very wide.
Considering the total volume of business, however, the province of Bari leaves the record in favor of the province of Barletta-Andria-Trani, capable of registering a value of 80 euros per inhabitant which allows to distance the provincial capital by more than 20 euros.

8 The analysis of the different components of the provincial cultural systems makes it possible to observe their peculiarities and to offer a more in-depth reading of the **sectoral characteristics**.
The most relevant type of show is represented by **the cinematographic activities** that, with 181.560 representations, **constitute 79% of the total of the shows on stage in Apulia**. Compared to 2016, there was a contraction of -1.0%, however lower than the trend recorded in the South (-2.1%) and the national average (-2.6%).
This means that the weight on the national total (5.8%) grows with the result that the Apulian cinemas manage to absorb almost 27% of the entire cinematographic activity of the south.
Beyond the number of entry tickets, the number of shows produced has increased at an average growth rate of + 1.8% every year. Apulia also emerges in comparison with the other regions, positioning itself, with 45 shows and 1.281 entry tickets per 1.000

inhabitants, under the Veneto and first of all the other realities of the South, except for Abruzzo (1.648 entry tickets). In the region, in 2017, 6.632 **theatrical representations** have been set up, that is the 4.9% of the 135 thousand performances that took place throughout Italy and 24% of southern activities.
Compared to 2016, **the number of shows increased by + 0.6%,** by establishing a positive trend which, since 2011, has seen an average annual increase of + 1.4%.
This is a result in contrast with what was observed at the overall national level, where shows' offer has recorded a reduction of -1.2% compared to 2016 and the -0.2% compared to 2011.
The participation, however, came to a standstill. In 2017, the entrances to theatrical performances amounted to 939.404, or 5.3% less than what was highlighted the previous year.
This was reflected in the performance of all **the indicators that recorded a decline**. Expenditure at the box office (expenditure on tickets and season tickets) fell by 15.8% to 11.5 million euros; as a result, public spending fell by 16.7%. The total volume of business achieved, equal to 12.7 million euros, recorded a reduction of -16.2%.
In particular, Apulia is positioned after Sicily, Sardinia and Campania, with 232 entries per 1.000 inhabitants, far from the 249 observed for the South and from 372 for the national average. This is also reflected in the results recorded for monetary revenue.
Expenditure at the box office and the volume of business collected in 2017 amounted respectively to 2.86 euros in Puglia and 3.14 euros per inhabitant. The gap between the region and the performance recorded by the national average remains very wide, where these values reached 6.45 and 7.61 euros per inhabitant respectively in the last year.
The concert season has seen a fluctuating trend in Apulia.

In 2017 there were 1.737 concerts in the region, equal to 4.4% of the national total and 19.6% of the southern area. **Compared to 2016, the offer seems to have been significantly reduced**, considering that the decrease in the number -of concerts made compared to the previous year is equal **to -15.5%. Despite the sharp reduction in the number of events, the monetary revenues have recorded an almost stable trend, managing to keep the volume of business unchanged than 2016, for a total of 12.5 million euros**.
By comparing the data to the resident population and thus obtaining values per capita, Apulia is better placed than the average distribution both in terms of the number of shows (0.4 per thousand inhabitants) and number of tickets sold (144 per thousand inhabitants). Comparison with the national average, however, returns a picture in line with that of the other types of shows analyzed so far.
The relative advantage of the region related to the other southern ones is also confirmed by the ability to attract resources from the organization and realization of concerts. This applies both to revenue from the sale of tickets (2.55 euros per inhabitant) and also to spin-off income (3.10 euros per inhabitant). Apulia is above the average distribution, second only to Sicily (3.05 and 3.10 euros per inhabitant), the first reality of the South.

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