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Introductory Abu Dhabi Cultural Activities Baseline Report

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2020 Report

CultureSTATS -AD

Introductory Cultural Activities Baseline

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM

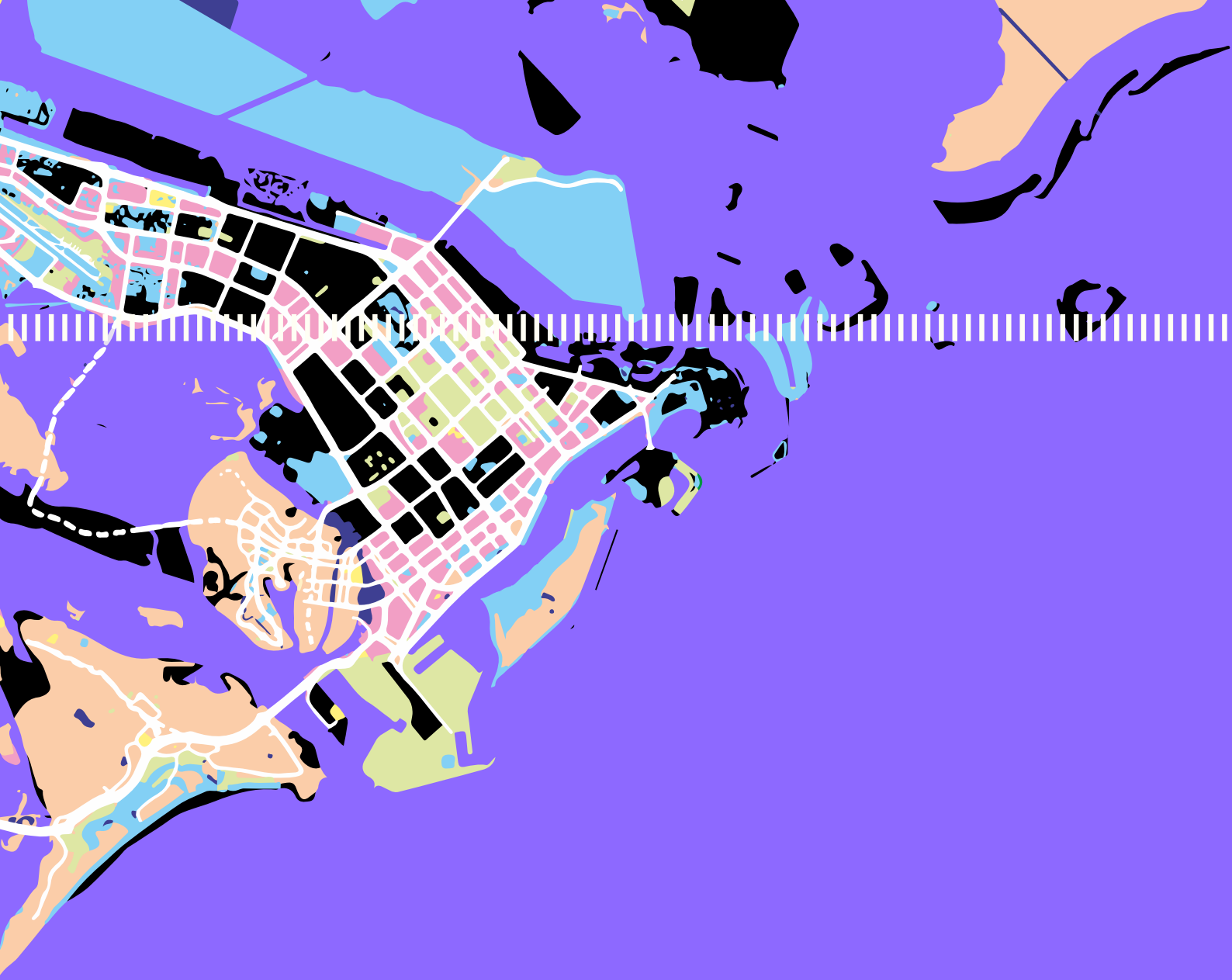


2020 Report

CultureSTATS -AD

Introductory Cultural Activities Baseline





Introductory Cultural Activities Baseline

2020 Report

Produced as part of
CultureSTATS-AD

NOTES ON THE SCOPE OF DATA COLLECTION

The Introductory Cultural Activities Baseline report focuses on the private sector data following the ISIC codes framework as per the ESSnet-Culture approach. Consequently, twofour54, as an administrative public entity, will form part of the Public Expenditure module, and its integration is planned under CultureSTATS-AD coming stages. On the other hand, the businesses supported by twofour54 are included in the Introductory Cultural Activities Baseline scope and analysis where relevant (in employment estimates and partly in mapping). The updated 2021 data received from twofour54, and the Media Zone Authority partners will be integrated in the next report and following ISIC codes.

The public, semi-public and not-for-profit sectors data has been intentionally excluded from the Introductory Cultural Activities Baseline (CAB) analysis, as these sectors will be studied in the Public Expenditure (PE) module in 2021-2022. A holistic and inclusive vision of Abu Dhabi's culture sector can be achieved after the integration of the CAB and PE blocks (expected in 2022).

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Note on Terminology:

The Department of Culture and Tourism - Abu Dhabi (DCT Abu Dhabi) is a merge between the Abu Dhabi Authority for Culture and Heritage (ADACH), Abu Dhabi Tourism Authority (ADTA) and the Cultural Department of Tourism Development and Investment Company (TDIC). It was known as Abu Dhabi Tourism and Culture Authority (TCA) from 2012 to 2016.

Introductory Cultural Activities Baseline Report
Produced as part of CultureSTATS-AD

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This report was realised by the Department of Culture and Tourism - Abu Dhabi (DCT Abu Dhabi), and was prepared by Elena Raevskikh and Jorge Pinto, with contributions by Gregory Baeker. The efforts and participation of all sectors and departments under DCT Abu Dhabi contributed to the production of this report and its dissemination.

HIGHLIGHTS

In 2020, the Introductory Cultural Activities Baseline (CAB) report was delivered to create knowledge about: (1) the existing cultural activities in Abu Dhabi; (2) the development of each culture sub-sector; and (3) the existing and emerging cultural clusters. Additionally, CAB incorporates estimates of cultural employment in Abu Dhabi; shows the potential of a tailored multilayer cartographic analysis; explores the relationships of spatial proximity among different types of cultural amenities; and maps the historical development of Abu Dhabi's culture sector.

- As per the available data, the leading Abu Dhabi culture sub-sectors are: Retail sale of books and journals (23.4%); Advertising (19.6%); Creative, art and entertainment activities (18%); Photographic activities (11.2%); and Specialised design activities (7.88%).

- According to the implemented statistical estimation model, the number of people employed in Abu Dhabi's culture sector is within a range of 17,171 to 21,554 people, with 95% probability. This would place Abu Dhabi on average with the world employment statistics (average 1%), but far from the more advanced cultural economies (average 5%). However, this estimation is considered an intermediary result that needs to be tested when we are able to collect the complementary quantitative and qualitative data.

- Most of Abu Dhabi's cultural activities have a natural tendency to be clustered in the same city areas. The clusters make an organic part of the urban ecology and are 'specialised' as they are formed primarily by the cultural activities of the same sub-sector. Qualitative research is recommended to understand the potential of the further development of these clusters, that in some cases might not define themselves as 'cultural', even though they are part of the emirate's cultural landscape
- Abu Dhabi cultural business demography is characterised by a relative stability. Many historical cultural amenities founded in the 1970 to 1990s are still active.

Table 1 summarises the principal characteristics of the Abu Dhabi culture sector since the foundation of the United Arab Emirates up to today. It gives an overall vision of the specific chronology of each culture sub-sector (e.g. year of foundation of each sub-sector in Abu Dhabi, the key periods of rise of each sub-sector, as well as the latest peak year – when the overall number of licences was at the highest compared with other years since the sub-sector foundation.). Additionally, the table puts together the current tendencies of each sub-sector development (ascending, descending or flat), as well as the average employment estimations. Furthermore, it summarises the presence (or the absence) of the cultural assets of each type in Abu Dhabi city, Al Ain and Al Dhafra.

Table 1 - Abu Dhabi's cultural landscape general summary

Sub-Sector	Foundation Year (Ascending)	Active Rise Since	Peak Year	Current Trend	Employment Estimation	Abu Dhabi City	Al Ain	Al Dhafra
Photographic Activities	1970	1970	2019	▲	3,276	•	•	•
Retail Sale of Books, Newspapers and Stationery	1970	1970	2018	▼	4,924	•	•	•
Retail Sale of Music and Video Recordings	1970	1970	2015	▼	938	•	•	•
Printing	1970	2001	2011	▼	782	•	•	•
Service Related to Printing	1970	2003	2010	▼	225	•	•	-
Motion Picture Projection	1970	2000	2019	▲	n/a	•	•	-
Libraries, Archives, Museums	1971	2008	2019	▲	624	•	•	•
Motion Picture, Video and Television Production	1973	2017	2019	▲	2,343	•	•	-
Motion Picture, Video and Television Distribution	1973	2015	2019	▲	106	•	•	-
Sound Recording and Music Publishing	1973	1973	1990	▼	134	•	•	•
Advertising	1973	2014	2019	▲	5,077	•	•	•
Specialised Design Activities	1975	2000	2019	▲	3,474	•	•	•
Book Publishing	1975	2000	2016	▼	221	•	•	-
Publishing of Newspapers, Journals and Periodicals	1975	2000	2014	▼	141	•	•	-
Creative, Arts and Entertainment	1976	1976	2019	▲	5,324	•	•	•
Manufacture of Jewellery	1980	2002	2006	▼	n/a	n/a	n/a	n/a
Renting of Video and Disks	1982	1982	2005	▼	27	•	n/a	n/a
Software Publishing	1983	2017	2019	flat	103	•	-	-
Cultural Education	1984	1984	2019	▲	576	•	•	•
News Agency Activities	1984	2017	2018	▼	21	n/a	n/a	n/a
Other Publishing Activities	1989	1989	2019	▲	78	n/a	n/a	n/a
Motion Picture, Video and Television Post-Production	2002	2002	2018	▼	109	•	-	-



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Introduction

The establishment of CultureSTATS-AD marks another step in Abu Dhabi's growing reputation as a leader in comprehensive and systematic approaches to cultural planning and designing. The Department of Culture and Tourism - Abu Dhabi (DCT Abu Dhabi) was established to lead in cultural policy, planning and development. Since its formation, strategic planning with defined and clear priorities guides the Department's agenda. These priorities include studies that highlighted the vital role that the culture sector plays in the social and economic development in Abu Dhabi. The need for rigorous evidence-based planning and decision-making availed.

In this context, DCT Abu Dhabi launched CultureSTATS-AD in 2019, a pioneering systematic cultural statistics programme. This report marks the programme's first primary deliverable, with a baseline mapping of cultural assets across all the Culture and Creative Industries (CCI) sub-sectors. The report draws a crucial distinction between information and data. Research-driven knowledge continues to be core to the theoretical foundation of DCT Abu Dhabi's ethos with the support of the

CultureSTATS-AD. The programme commits to consolidate a comprehensive classification instrument to measure the economic and social dimensions of culture. While addressing defined culture-specific activity, the programmes' thematic indicators also transverse other sectors, revolutionising cultural development in Abu Dhabi.

CultureSTATS-AD utilises leading international standards and statistical frameworks, setting a foreseen comparative research and analysis course. In particular, it has drawn on the cultural statistics programme of the European Commission (ESSnet-Culture) and UNESCO's Framework for Cultural Statistics. The programme's plan is consequently informed by UNESCO's Culture-2030 Indicators and aligns with the UN 2030 Sustainable Development Goals (SDGs). With this, CultureSTATS-AD stems from Abu Dhabi's specificities and is rooted in its unique cultural fabric.

CultureSTATS-AD supports planning and decision-making by using Geographic Information Systems (GIS) technologies to map cultural resources and add a complimentary

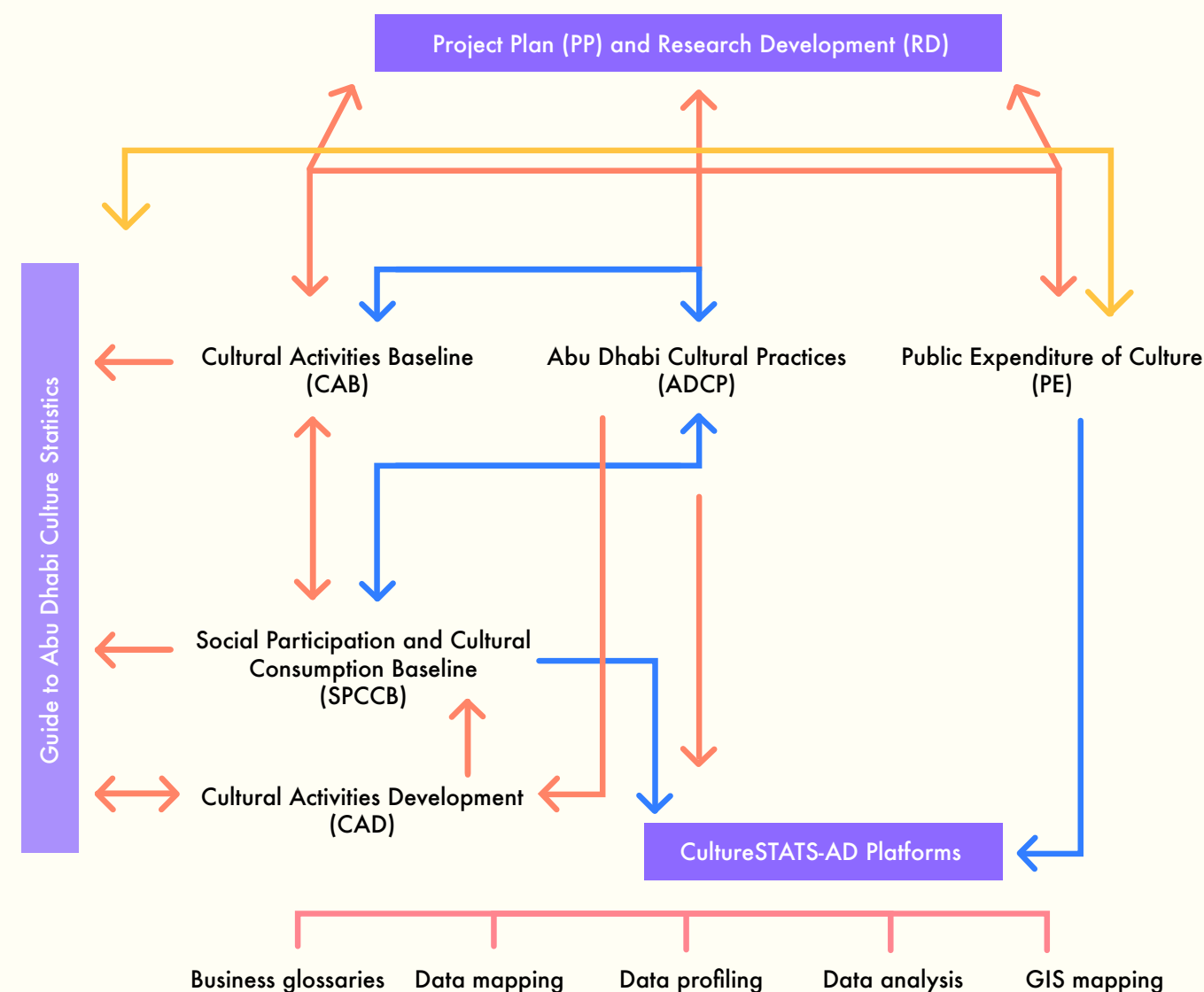


Figure 1 - CultureSTATS-AD Pert Chart

layer of information. This added level of data supports the perception of the cities as creative cultural ecosystems. In addition to this, mapping covers the spatial distribution of cultural resources through cities' defining characteristics and demographics. Providing evidence of found realities generates arguments for implementing strategies to diversify the allocation of cultural assets and amenities. Cultural layers also enable civic decision-makers to integrate information with other planning issues, such as transport, locations of schools and delivery of social services. Culture, here, becomes a critical factor in decisions that cities and jurisdictions must make. Making these findings available and understanding networks, relationships, and interdependencies are essential to building resilient and sustainable cultural systems.



CHAPTER 1:

Introductory Cultural Activities Baseline

DATA COLLECTION SCOPE

The culture data collection that supports the CAB Module analysis is based on the statistical definition of culture elaborated by the ESSnet-Culture framework, derived from Eurostat's European Working Group on Cultural Statistics. This framework is extensively documented: it captures all core domains and functions of a culture sector and proposes a systemised set of definitions and a methodology. While being fully compatible with the UNESCO framework, it is more focused on capturing the cultural assets and their value and allows the creation of a cultural resource framework and mapping, which can support future research. Even though Abu Dhabi is currently not able to integrate a regional framework such as the ESSnet-Culture framework, it offers a tool of systematisation that allows a primary attempt to put together, compare and assess the heterogeneous Abu Dhabi culture data elements.

Both the ESSnet-Culture framework and the Directory of the Economical Activities of the United Arab Emirates Ministry of Economy are aligned with the International Standard Industrial Classification (ISIC) of all economic activities' classification. Consequently, CAB is defined through the activities that are (1) defined as 'cultural' by the ESSnet-Culture framework and (2) extracted from the collected Abu Dhabi data according to the relevant activity codes. This approach allowed the first overview of the Abu Dhabi cultural landscape and monitoring of its major dynamics to be achieved.

The benchmarking with the ESSnet-Culture framework and codes of economic activities (such as ISIC) is not able to cover the whole range of the cultural activities that exist in Abu Dhabi. While the statistical definition of culture allows a focus on the economic dimension of the cultural activities, it does not take into consideration, for example, home-based cultural practices (e.g. a home sound recording studio), amateur artistic expressions (e.g. community-based music and theatre productions), venues that may not be officially designated as cultural locations but still host cultural events (e.g. hotels that provide live music, and art exhibitions in business venues). The current result is consequently a baseline that will be adapted and specified further in the nearest future.

MULTI-LAYER CARTOGRAPHIC ANALYSIS: CULTURE, TERRITORY, PEOPLE

To show the potential of multi-layer cartographic analysis, the available cultural and social data layers are superimposed on a map to understand how culture and cultural resources interact with different types of populations (e.g., different nationalities, levels of income and age groups), social phenomena (e.g. crime rate), etc. This approach has been proven to be useful internationally for evidence-based decision making and definition of the territories that require tailored cultural intervention.

Several open access Abu Dhabi city base maps created by researchers who worked on Urban Observatory Project have also been identified. For example, the map below shows the density of the youth population in Abu Dhabi, based

on the data shared by ADDA in 2018. This data does not cover the whole emirate of Abu Dhabi; however, it gives an overview of the main tendencies.

The multi-layer cartographic analysis allows for the visualisation and comparison of the correlations between Abu Dhabi's youth population and the existing cultural resources, for example, (1) Cultural Education, (2) Libraries and (3) Bookstores.

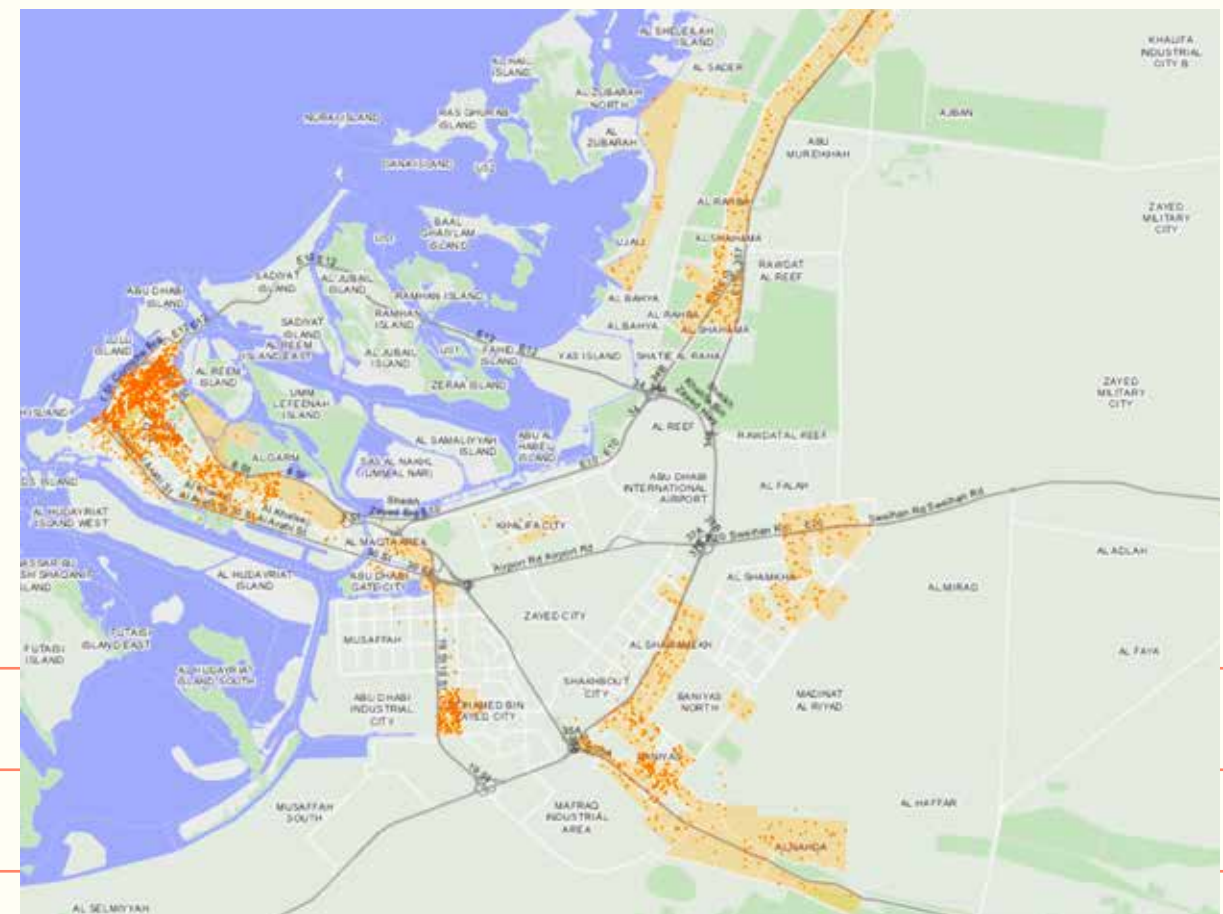


Figure 3 - The density of youth population in Abu Dhabi
Youth population (under 18 years): 1 dot=201.273978

PRIMARY DATA VISUALISATION

Statistical graphics and information visualisation aids the process of creating new knowledge. With the in-depth statistical analysis of the Introductory Cultural Activities Baseline data, other forms of visual representations could be deployed to extend the understanding of cultural patterns, support deep-dive analyses and clearly disseminate information. These forms include multi-layer cartographic analysis, retrospective cartographic analysis and heatmaps, amongst others.

ABU DHABI CULTURAL ASSETS 'TIME MACHINE'

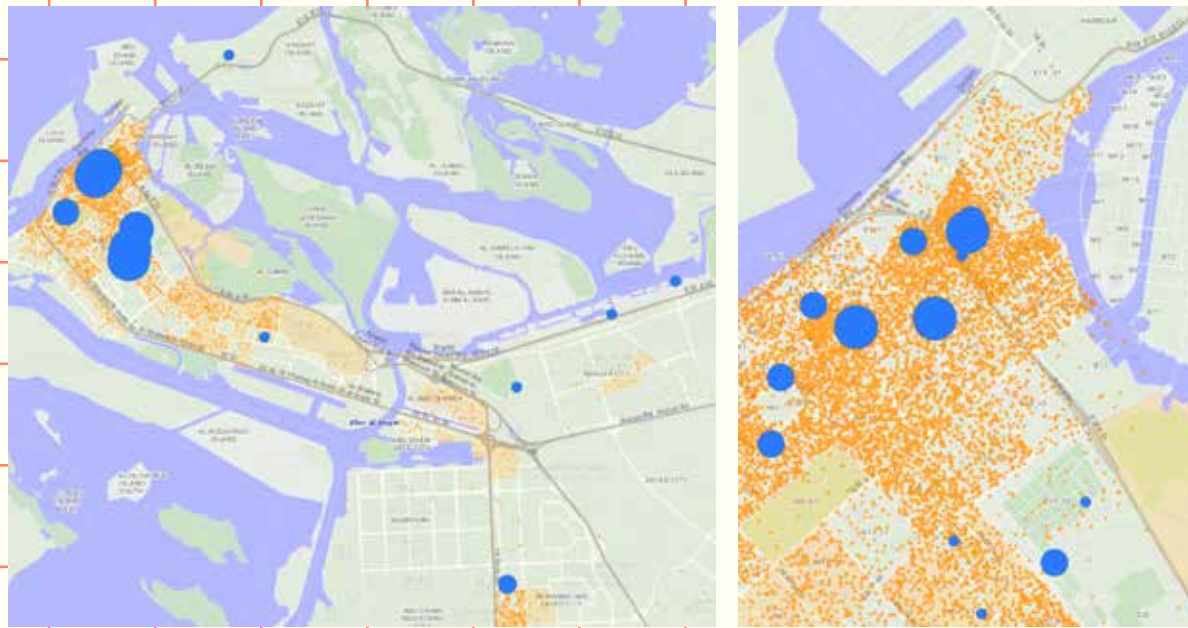


Figure 4 - Distribution of Abu Dhabi youth population vs Cultural education assets

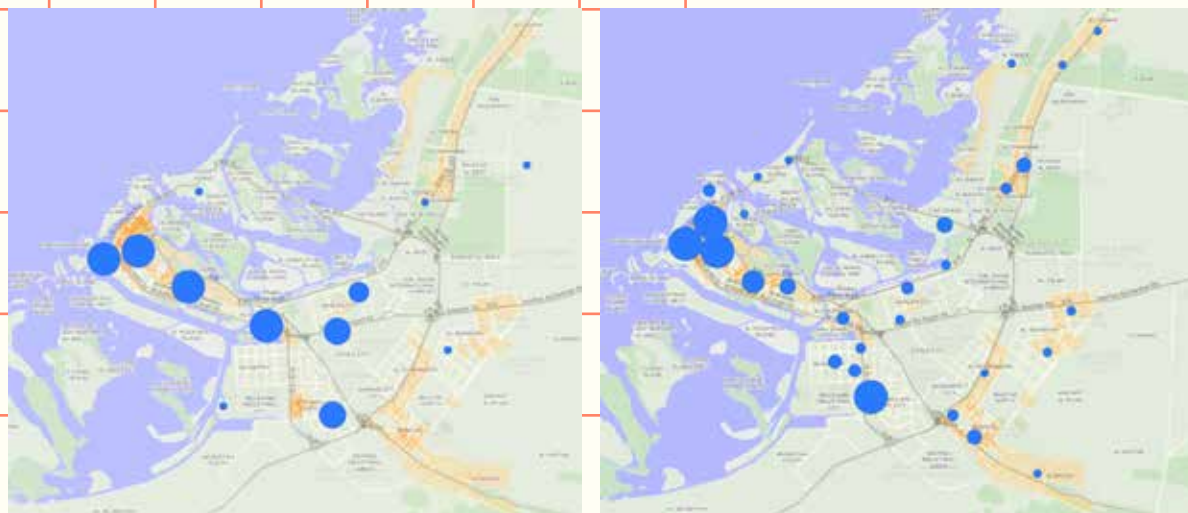


Figure 5 - Distribution of Abu Dhabi youth population vs Libraries (left) and Bookstores (right)

The cartographic analysis permits the analysis of Abu Dhabi's cultural assets chronologically and promotes understanding of how Abu Dhabi's cultural landscape has evolved over time. The interactive GIS platform being developed can visualise the state of the culture sector as per a requested period (e.g. 1970-1990, 1990-2005, etc.) As the cultural amenities reflect the dynamics of different Abu Dhabi neighbourhoods, this research can support programmes related to the history and modern heritage of the emirate.

For example, the maps below illustrate the development of the Abu Dhabi culture sector since 1970 (the older amenities are indicated by darker

shades). Al Markaziyah and surrounding areas (Al Danah, Al Zahiya) have been particularly saturated by cultural assets since the foundation of the United Arab Emirates in 1971. The Al Sanaiya-Al Safah and Musaffah areas concentrate several older cultural amenities as well.

In Al Ain, the development of cultural assets extended mainly from the Al Humairah area. The Al Sanaiya-Al Safah area also concentrates numerous older cultural amenities. In Al Dhafra, the founding assets such as the Al Dhafra Co-Operative Society, which develops Advertising activities and was registered in 1978, can be identified.



Figure 6 - A chronological map of Abu Dhabi cultural assets: Al Markaziyah, Al Danah and Musaffah (older amenities are indicated by darker shades)

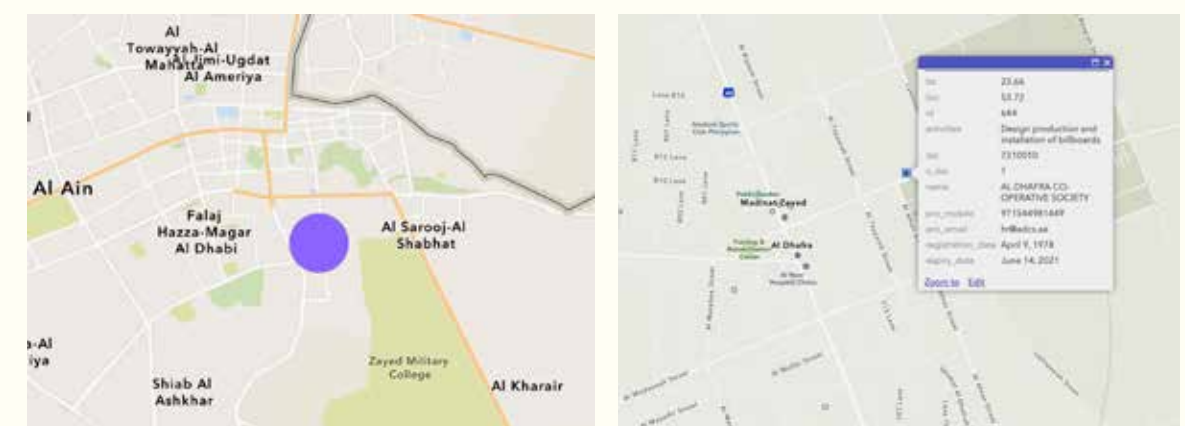


Figure 7 - A chronological map of cultural assets in Al Ain (left map) and Al Dhafra (right map) (older amenities are indicated by darker shades)

A historical analysis of the Abu Dhabi cultural scene would require the expertise of Abu Dhabi historians and senior community members to gain understanding of the context and historical circumstances of the establishment of the older assets that became part of the emirate's modern history. Also, understanding the factors that impacted different culture sub-sectors in the past could be useful for the creation of targeted cultural policies in the future.

According to the maps shown here, it is evident that the correlation between the Abu Dhabi youth population and cultural education is very strong especially in Abu Dhabi downtown. The libraries are also mostly concentrated in Abu Dhabi downtown and correlate less with the youth population in the peripheral areas of Abu Dhabi. Compared to the cultural education assets and the libraries, the distribution of bookstores is more uniform and is more correlated with the youth populations of the peripheral neighbourhoods of Abu Dhabi.

ABU DHABI CULTURAL ACTIVITIES HEATMAP

A heatmap is a distance matrix that shows the distance between elements of interest, in this case, multiples of different cultural assets in Abu Dhabi. While the GIS mapping cluster analysis illustrates how the cultural assets of the same type congregate in the same urban areas, this heatmap analysis provides a better vision of the relation among different types of cultural assets.

According to the analysis, the most important observable spatial proximities are observed between the following cultural activities (see Table 2).

Strong spatial relation	Renting of video tapes and disks	Photographic activities	0,82
	Motion picture, video and television programmes distribution	Other publishing activities	0,72
Moderate spatial relation	Publishing of newspapers, journals and periodicals	Photographic activities	0,52
	Sound recording and music publishing activities	Other publishing activities	0,541
	Motion picture projection activities	Advertising	0,514
	Motion picture, video and television programmes post-production activities	Book publishing	0,457

Table 2 - Spatial proximities between different types of cultural amenities in Abu Dhabi

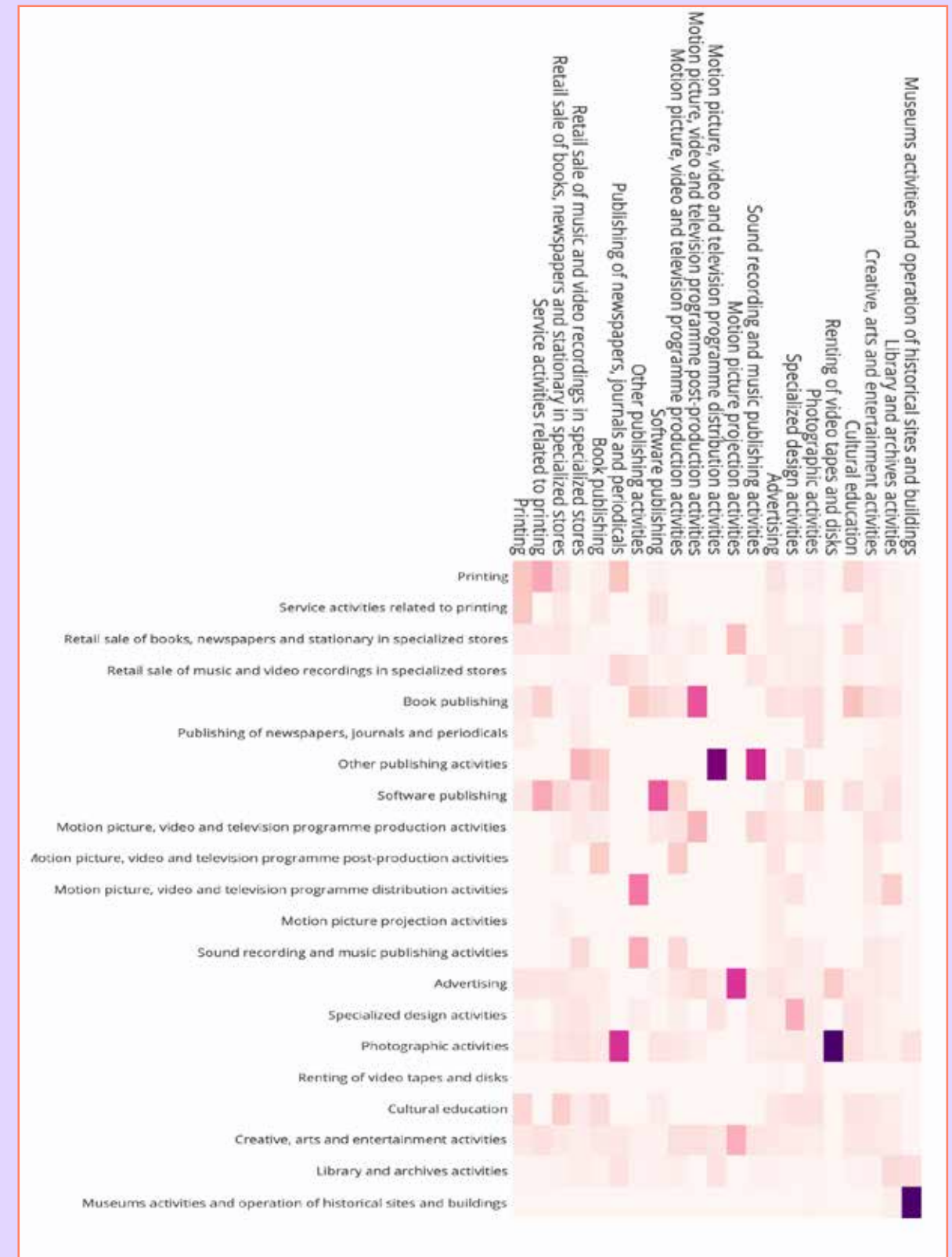


Figure 8 - Heatmap: distance between the pairs of different types of cultural activities in Abu Dhabi



CHAPTER 2:

Abu Dhabi's Culture Sector

Overview

The pie chart below indicates the proportions of different cultural activities that comprise the Abu Dhabi culture sector. In 2020, the leading sub-sectors were: Retail sale of books and journals (23.4%), Advertising (19.6%), Creative, art and entertainment activities (18%), Photographic activities (11.2%) and Specialised design activities (7.88%).

This chart is based on the most complete and well-structured data that DCT Abu Dhabi collected in 2020. For example, the data on twofour54 Community businesses (N=480)

was intentionally excluded, as this data did not contain any information on exact cultural activities that characterise each business. The data received through the Register of Cultural Organisations and Professionals (ROCOP) has been excluded as well, as DCT Abu Dhabi aims to assess its robustness in 2021 when a more significant number of records will be received. Despite these limitations, the analysis is already able to demonstrate the proportional meaning of different types of cultural activities identified so far.

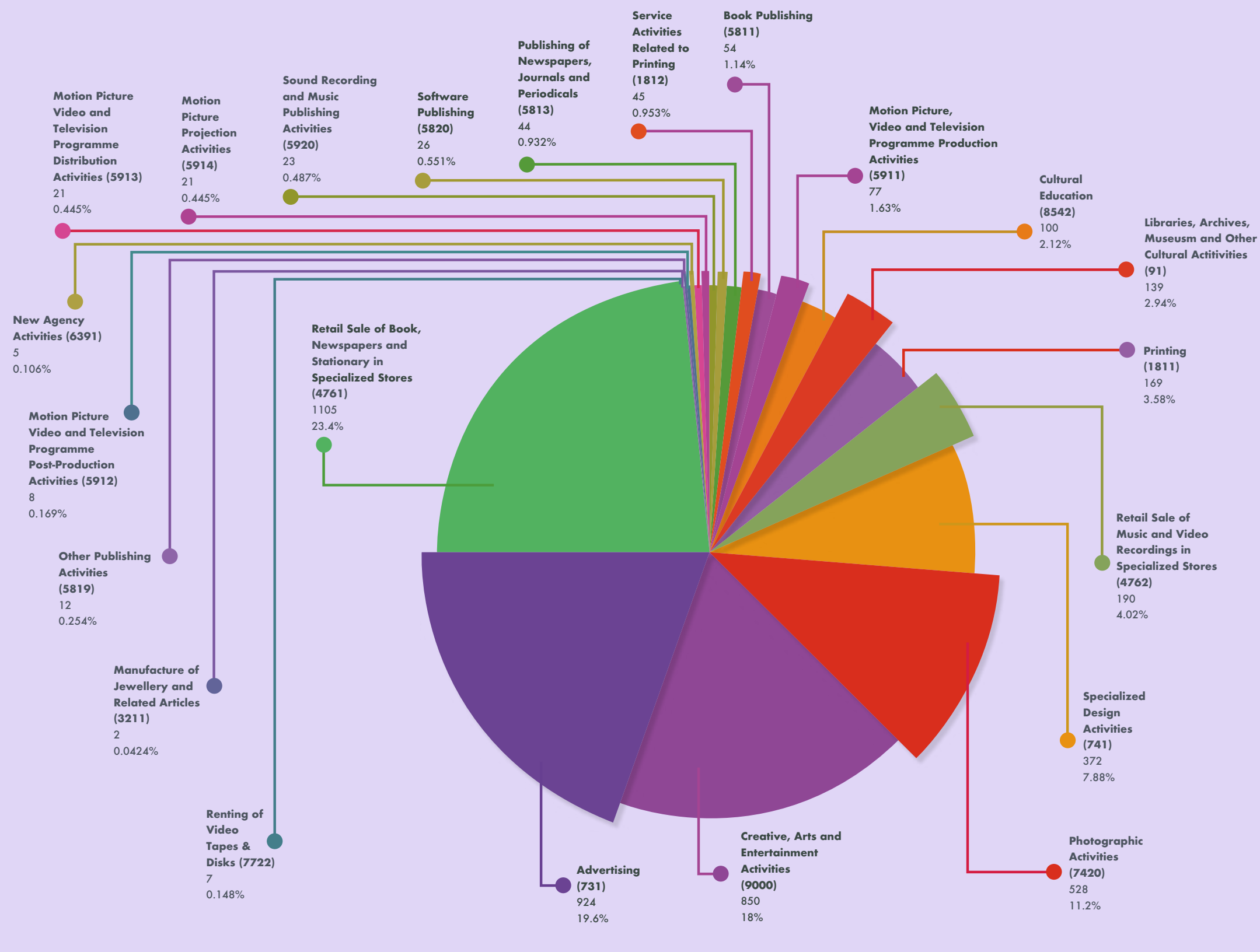


Figure 9 - Abu Dhabi's cultural assets overall representation

Sub-Sector	Foundation Year (Ascending)	Active Rise Since	Peak Year	Current Trend	Employment Estimation	Abu Dhabi City	Al Ain	Al Dhafra
Photographic Activities	1970	1970	2019	▲	3,276	•	•	•
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Retail Sale of Music and Video Recordings	1970	1970	2015	▼	938	•	•	•
Printing	1970	2001	2011	▼	782	•	•	•
Service Related to Printing	1970	2003	2010	▼	225	•	•	-
Motion Picture Projection	1970	2000	2019	▲	n/a	•	•	-
Libraries, Archives, Museums	1971	2008	2019	▲	624	•	•	•
Motion Picture, Video and Television Production	1973	2017	2019	▲	2,343	•	•	-
Motion Picture, Video and Television Distribution	1973	2015	2019	▲	106	•	•	-
Sound Recording and Music Publishing	1973	1973	1990	▼	134	•	•	•
Advertising	1973	2014	2019	▲	5,077	•	•	•
Specialised Design Activities	1975	2000	2019	▲	3,474	•	•	•
Book Publishing	1975	2000	2016	▼	221	•	•	-
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Manufacture of Jewellery	1980	2002	2006	▼	n/a	n/a	n/a	n/a
Renting of Video and Disks	1982	1982	2005	▼	27	•	n/a	n/a
Software Publishing	1983	2017	2019	flat	103	•	-	-
Cultural Education	1984	1984	2019	▲	576	•	•	•
News Agency Activities	1984	2017	2018	▼	21	n/a	n/a	n/a
Other Publishing Activities	1989	1989	2019	▲	78	n/a	n/a	n/a
Motion Picture, Video and Television Post-Production	2002	2002	2018	▼	109	•	-	-

Table 1 summarises the principal characteristics of the Abu Dhabi culture sector since the foundation of the United Arab Emirates until today. It gives an overall vision of the specific chronology of each culture sub-sector (e.g. year of registration of the first relevant asset in Abu Dhabi, the key periods of the rise of each sub-sector, as well as the latest peak year, i.e. the latest year when the overall number of licences was highest compared to the other years since the sub-sector's foundation). Additionally, Table 1 outlines the current tendencies of each sub-sector development (ascending, descending or flat), as well as the average employment estimations. Furthermore, it summarises the presence (or absence) of the cultural assets of each type in Abu Dhabi city, Al Ain and Al Dhafra. The analysis presented in Table 1 will be developed in more detail in the following parts of the report.

The year 2019 has become a 'peak year' for several types of cultural activities, such as, for example, Cultural Education; Creative, Arts and Entertainment Activities; Advertising; and others (see Table 1). This peak is a robust and observable data trend, expressed as gradual rise of several sectors with a climax in 2019. The 2020-2022 analysis will show the impact of COVID-19 on the culture sector. For an in-depth understanding of each sub-sector, an ethnographic study is recommended. In the cases of some cultural activities (e.g. Service Activities Related to Printing), the sub-sector development is rather stable despite the slight decline in the overall number of the licences since the latest 'peak year'. In other

cases, the declining tendency is evident, as since a remote 'peak year' the overall number of licences has decreased very significantly (e.g., Sound Recording and Music Publishing Activities).

The growth and the decline of different Abu Dhabi culture sub-sectors will be analysed in more detail in the subsequent parts of this report. According to the results of the data analysis, Abu Dhabi's cultural assets were divided into three broad categories: (1) Intensively growing Abu Dhabi cultural assets, (2) Stably developing Abu Dhabi cultural assets and (3) Stagnating Abu Dhabi cultural assets.

On the graphs introduced in the following parts of this report, the 'Number of active licences' indicator shows the number of active/operational cultural assets at each time point. Tracking this over time helps to identify which culture sub-sectors actively grow and which ones have a tendency to stagnate. The 'Number of new licences' indicator tracks openings of new cultural assets but does not take into account already existing businesses.

To introduce the processual analysis of each sub-sector, the description of the relevant ISIC code, retrieved from the United Nations Statistics Division, will be cited at the beginning of each sub-chapter. Finally, this research will be complemented with a cartographic dimension that explains how the cultural activities are distributed in the emirate of Abu Dhabi landscape and how they cluster.

CLUSTERING TENDENCIES

The notion of a cluster describes the geographic concentrations of interconnected companies and institutions in a particular sector. According to the cluster paradigm, the geographical rapprochement of economic actors would favour innovation, creative activities and transfer of 'tacit' knowledge linked to specific non-formalised know-how. Contemporary changes (such as, for example, new methods of production, new tools and strategies for public presentation, globalised markets, etc.) are transforming networks involved in the culture sector. Territorial concentrations of companies, research organisations, art schools, artists, associations, etc. emerge and pool technical, scientific, aesthetic and economic knowledge.

In recent years, it has become increasingly popular to refer to innovation clusters as 'entrepreneurial ecosystems', a concept that Mason and Brown discussed in 2013 as part of the broader question of what types of policy initiatives should be taken to promote the creation and maturation of high growth firms ('HGFs'). Mason and Brown cited the works of several researchers that support the premise that HGFs have a significant impact on economic development. For example, Brown et al. report that HGFs drive productivity growth, create new employment, increase innovation and promote business internationalisation. Henrekson and Johansson, after conducting a meta-analysis of prior empirical studies, concluded that "a few rapidly growing firms generate a disproportionately large share of all net new jobs compared with non-high growth firms". Others suggest that HGFs have important spill over effects that are beneficial to the growth of other firms in the same locality and industrial cluster. Consequently, in the context of Abu Dhabi, adopting culture sector support programmes that are more 'systems-based' and which rely mainly on 'relational' forms of support (e.g. building connections and networks among cultural entrepreneurs) could reinforce the sustainable cultural ecosystem.

and entertainment assets; however, this area is not acknowledged as such. By contrast, the Qasr Al Hosn area (that concentrates, among others, Specialised design activities and Creative, arts and entertainment activities) has more recognition as a 'cultural neighbourhood', as it is a major and well-known cultural landmark.

For policymaking, the notions that 'clusters like the competitiveness factor' on the one hand and that there is 'spontaneous tendencies for territorial grouping of certain activities' on the other are not contradictory, but complementary. The proper comprehension of the cultural geography of Abu Dhabi is beneficial for policymaking and management of both policies-induced cultural clusters and sporadic groupings of the cultural assets. In both cases, identifying the social, urban and economic factors that favour a sustainable cultural ecosystem is of primary importance. This report provides an initial overview of the cultural clustering tendencies in the Abu Dhabi, Al Ain and Al Dhafra areas. In the next few years, these primary results will be complemented and concertised further.

The CAB exploration is the first linchpin for systematic knowledge production, including noticing and interpreting competitive stimuli and critical periods for each culture sub-sector. This kind of analysis is critical to facilitate strategic planning processes and to avoid any preventable sector crisis.

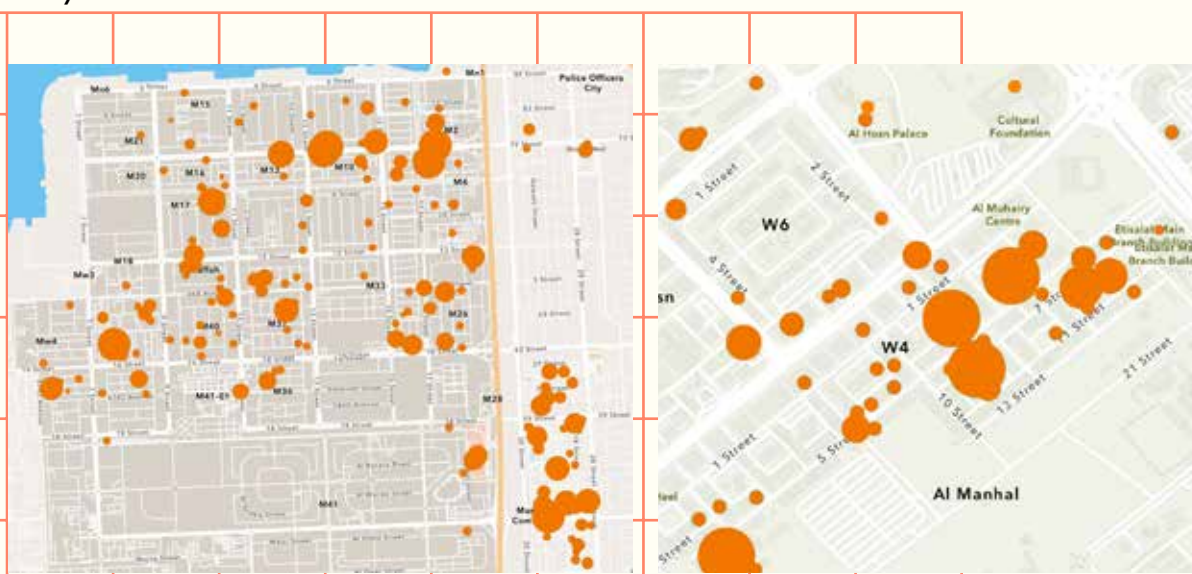


Figure 10 - A general overview of concentrated cultural assets near Qasr Al Hosn (left) and in Mussafah area (right)

ABU DHABI CULTURE EMPLOYMENT

Cultural and creative employment has come into prominence due to the increasing use of digital technologies and new modes of production based on demand. Cultural and creative wealth and job creation have their origin in individual creativity, skill and talent and are protected by intellectual property. These activities include direct cultural contents and have some sort of creativity, symbolic meaning and intellectual property. But employment in culture and creative activities also generates positive externalities that go beyond its boundaries as they inspire a more creative, innovative, entrepreneurial and artistic society. They make cities more liveable, providing the hubs and many of the activities around which citizens develop friendships, build a local identity and find fulfilment. They also improve the quality of life, provide resources for diverse new futures and contribute significantly to achieving people-centred, inclusive and sustainable development.

Globally, employment in culture and creative activities is a major driver of the economies of developed as well as developing countries. They are among the most rapidly growing sectors worldwide and they are the locomotive of the digital economy. It is estimated that culture and creative activities represent 29.5 million jobs worldwide, which constitutes 1% of the world's active population.

Culture and creative jobs also tend to attract a higher percentage of youth and tend to favour the participation of women compared with more traditional industries. Moreover, job creation is driven by small businesses or individuals, giving rise to an agile and innovative employment force. Hence, cultural and creative production is young, inclusive and entrepreneurial.

Methodological References

- This document encompasses situations where a person:
- holds a cultural occupation and works in the culture sector (e.g. a ballet dancer employed by a ballet company or a journalist working for a daily newspaper - field I);
 - holds a cultural occupation outside the culture sector (e.g. a designer working in the automobile industry - field II); or
 - holds a non-cultural occupation in the culture sector (e.g. an accountant working in a publishing house - field III).

The geographic rapprochement of economic players in Abu Dhabi needs to be analysed in relation to the development of the emirate itself and the constant shift in centres. The centres' shift and other urban variables particularise Abu Dhabi emirate and requires further explorations. The current report gives a primary and conceptually neutral vision of the currently observable clustering tendencies. This study will be expanded to achieve an in-depth qualitative understanding of cluster dynamics that are specific to Abu Dhabi.

The analysis shows that most of Abu Dhabi cultural businesses tend to be concentrated in the same city areas. This tendency is observable not only in the places that are designed as cultural clusters (e.g. Saadiyat Island, twofour54 community, etc.) but also sporadically. The local nodes of concentrated cultural assets contribute to an organic part of the entrepreneurial ecosystem and are 'specialised' as they are formed primarily by the cultural activities of the same sub-sector. Qualitative research is recommended to understand the potential of further development of these clusters, which might not define themselves as 'cultural', even though they comprise part of the emirate's cultural landscape. For instance, the Mussafah area is saturated in Advertising, Printing and Creative, arts

ACTIVITES (ISIC)				
Occupations (ISCO)			Cultural	Non-Cultural
		Cultural	I	II
		Non-Cultural	III	IV

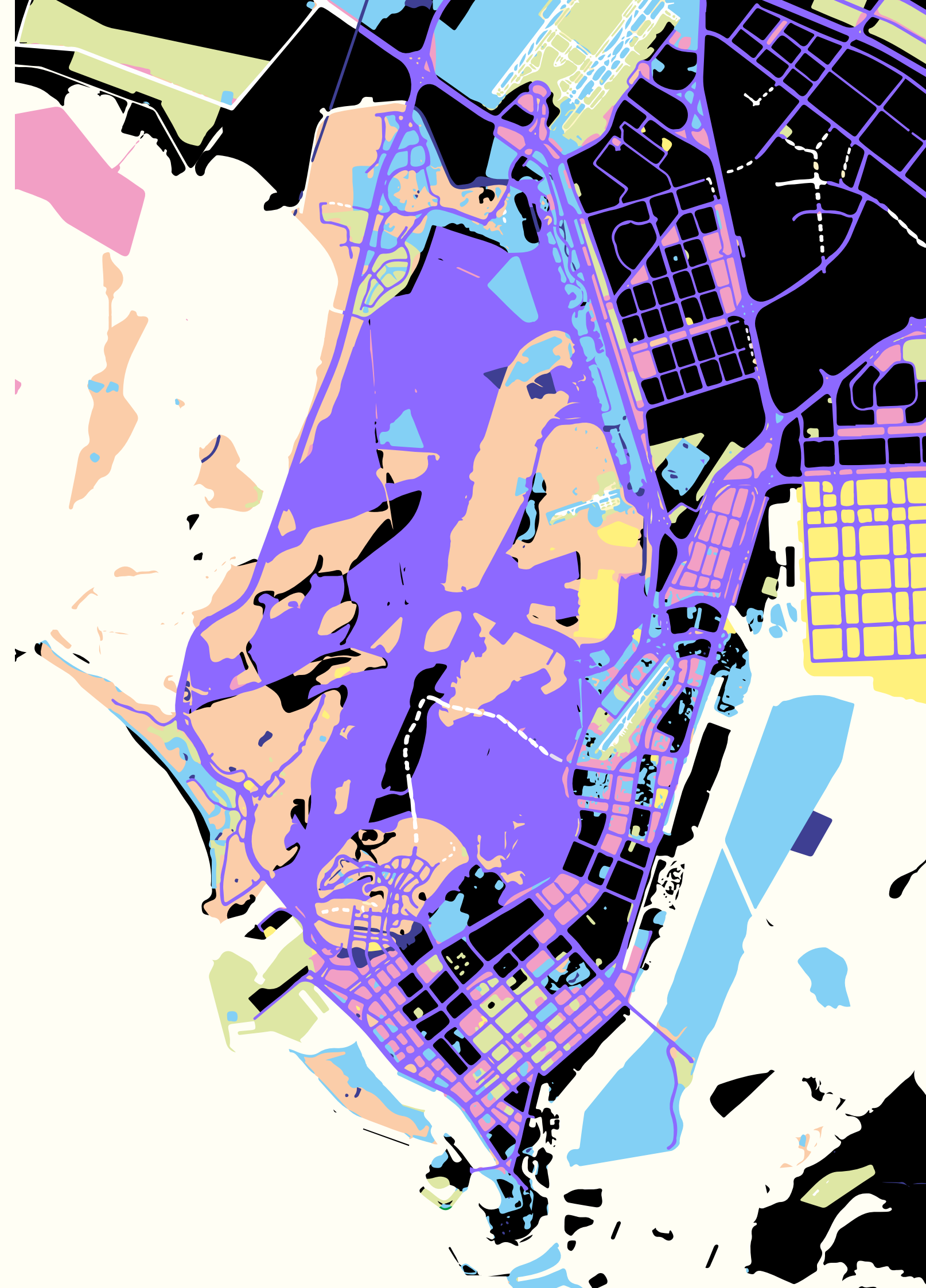
Table 3 - Cultural employment equation (the sum of I + II + III in Table 1)

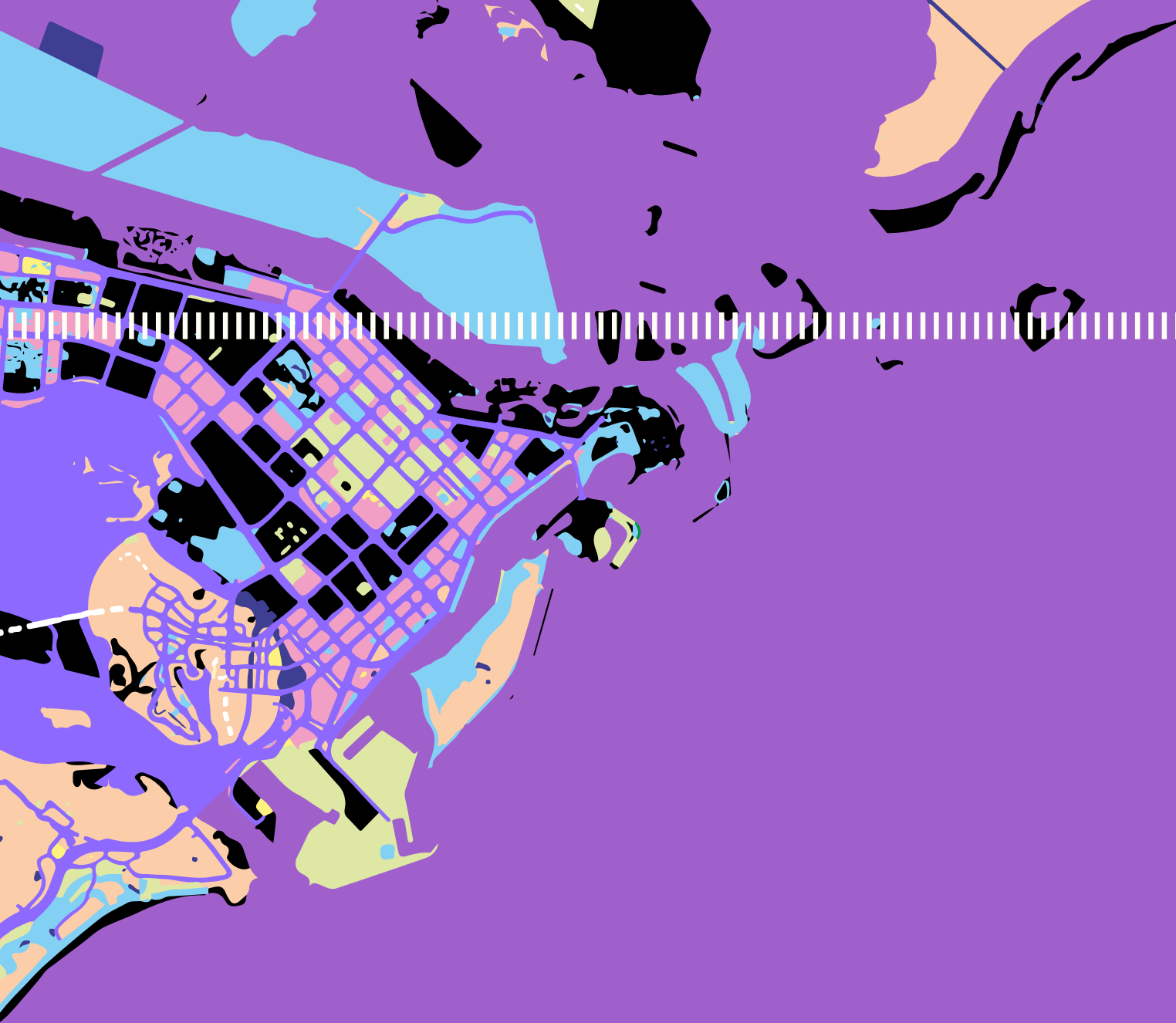
Not all the ISIC and ISCO codes are 'fully cultural'; some represent 'partially cultural' economic activities or occupations (e.g. among the listed cultural occupations, 'Philosophers, historians and political scientists' are considered as 'partly cultural', whereas 'Photographers' are qualified as 'fully cultural', etc.). Therefore, ESSnet-Culture put forward an inventory of all fully or partially cultural ISIC and ISCO codes.

Results

The number of people employed in the culture sector is between 17,171 and 21,554 people with 95% probability. According to the data provided by SCAD, the overall number of employees in Abu Dhabi was 1,878,019 in 2018. Consequently, the share of the culture sector can be estimated to be between 0.88% and 1.17%. However, these numbers might be underestimated, as the calculation has been limited by the scope of the available culture data collected so far. This would place Abu Dhabi on par with the world employment statistics (average 1%), but behind the developed cultural economies (average 5%).

The culture sector employment estimation needs to be refined using complementary quantitative and qualitative data. For example, the analysis does not include cultural occupations outside the culture sector (e.g. a designer working in the automobile industry) and cultural freelancers. Also, as it is calculated based on the number of active licences in 2020, it was not possible to identify how many cultural enterprises are de facto active (and preserve the whole number of their employees) in December 2020. Finally, no employment in the public sector is also captured, except the DCT Abu Dhabi manpower data. A separate and more detailed analysis of public expenditure is required in the future. Consequently, this estimation is considered as an intermediary result that needs to be tested in the next stages of CultureSTATS-AD, when the complementary quantitative and qualitative data has been collected.





**Intensively
Growing
Abu Dhabi
Cultural Assets**

ISIC CODE 9000 - CREATIVE, ARTS AND ENTERTAINMENT ACTIVITIES

Sub-Sector Development Statistics

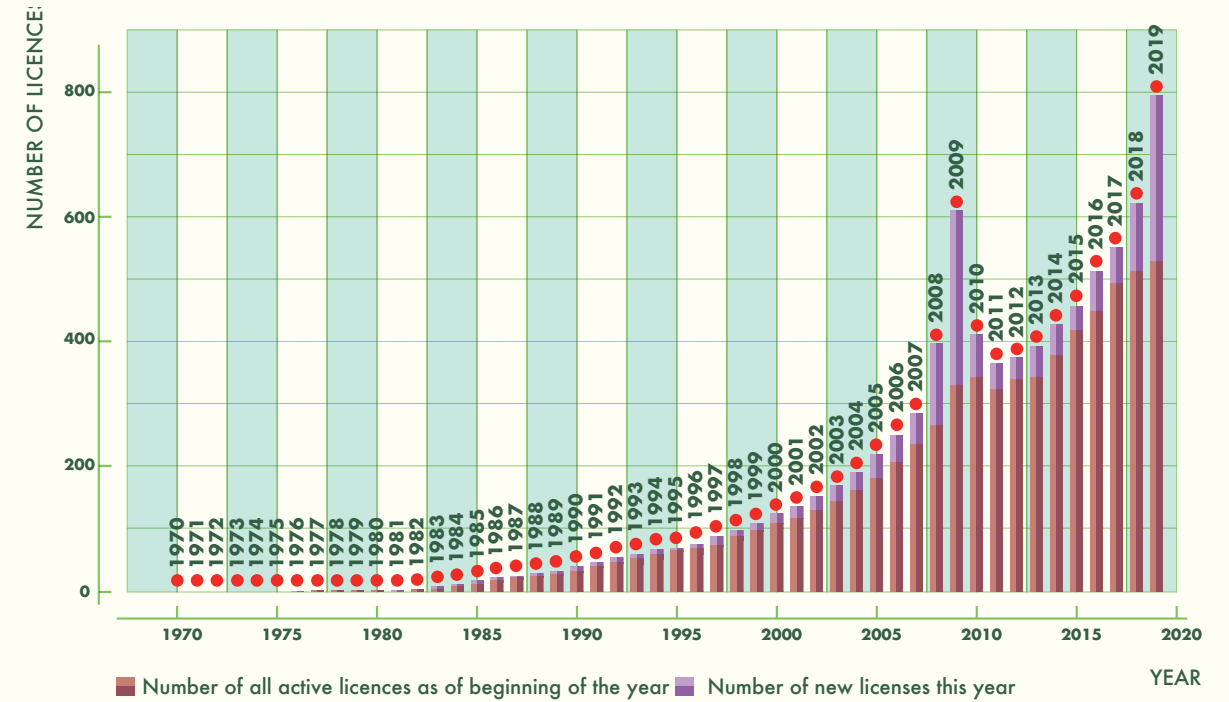


This class includes the operation of facilities and provision of services to meet the cultural and entertainment interests of their customers. This includes the production and promotion of, and participation in, live performances, events or exhibits intended for public viewing, the provision of artistic, creative or technical skills for the production of artistic products and live performances.

This class includes:

- Production of live theatrical presentations, concerts and opera or dance productions and other stage productions.
- Activities of groups, circuses or companies, orchestras or bands.
- Activities of individual artists such as authors, actors, directors, musicians, lecturers or speakers, stage-set designers and builders, etc.
- Operation of concert and theatre halls and other arts facilities.
- Activities of sculptors, painters, cartoonists, engravers, etchers, etc.
- Activities of individual writers, for all subjects including fictional writing, technical writing, etc.
- Activities of independent journalists.
- Restoring of works of art such as paintings, etc.
- Activities of producers or entrepreneurs of arts live events, with or without facilities.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the start of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 9000 - Creative, Arts and Entertainment Activities in Abu Dhabi (1976-2020)

According to the analysis, the first Creative, Arts and Entertainment assets were registered in Abu Dhabi in 1976. Since then, the number of assets of this sub-sector has been increasing, with a particular surge in 2009. Today, more than 850

Creative, Arts and Entertainment businesses have active licences in Abu Dhabi.

Creative, Arts and Entertainment Activities: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).

ISIC CODE 8542 - CULTURAL EDUCATION IN ABU DHABI

Sub-Sector Development Statistics

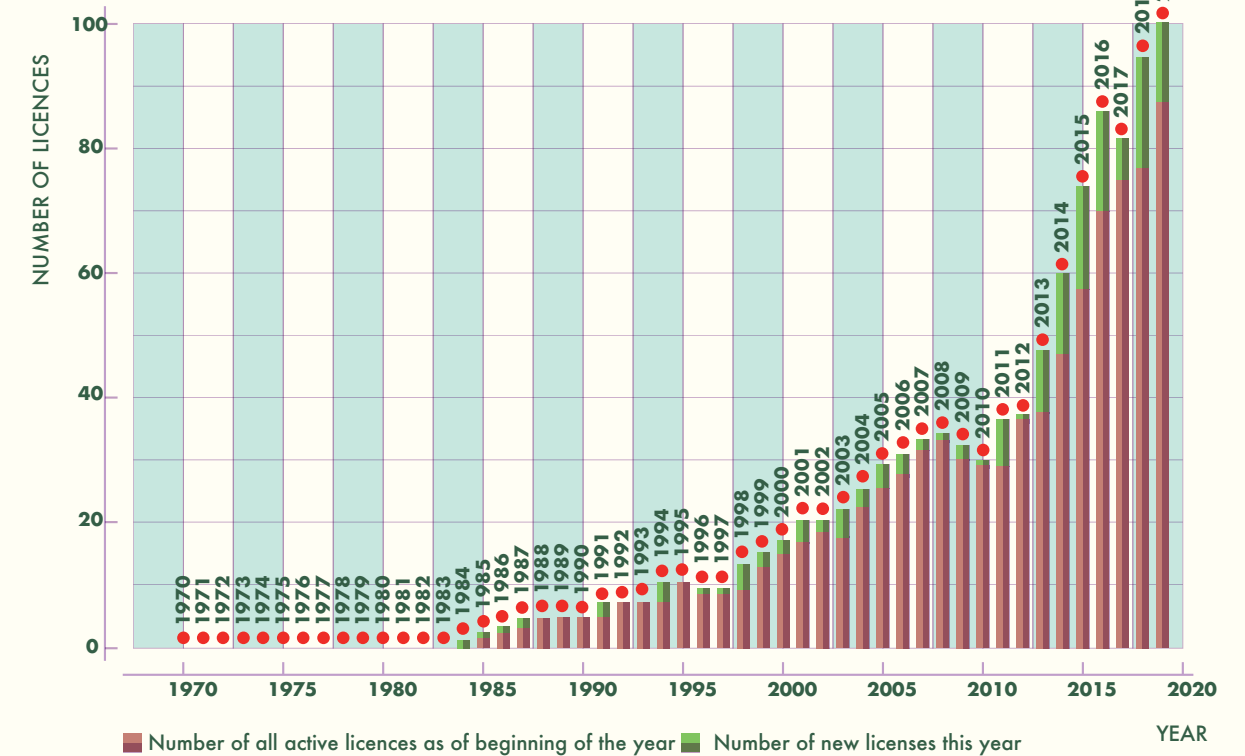


This class includes the provision of instruction in the arts, drama and music. Units giving these type of instructions might be called 'schools', 'studios', 'classes', etc. They provide formally-organised instruction, mainly for hobby, recreational or self-development purposes, but such instruction does not lead to a professional diploma, baccalaureate or graduate degree.

This class includes:

- Piano teachers and other music instruction.
- Art instruction.
- Dance instruction and dance studios.
- Drama schools.
- Fine arts schools.
- Performing arts schools.
- Photography schools.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the start of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.

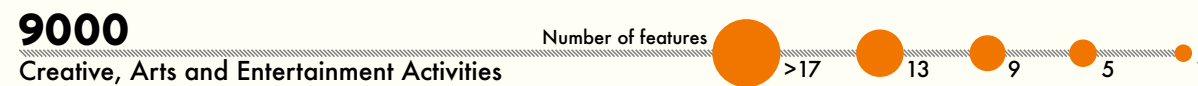


Data Visualisation - ISIC Code 8542 - Cultural Education in Abu Dhabi (1984-2020)

The first Cultural Education asset was registered in Abu Dhabi in 1984. Since then, the number of Cultural Education assets is increasing with particular sub-sector growth since 2013 (from 47 assets in 2013 to over 100 assets in 2020.)



Map 2 Creative, Arts and Entertainment Activities clusters in Abu Dhabi



Map 3 Creative, Arts and Entertainment activities clusters in Al Ain (left map) and in Al Dhafra (right map)

In the scale of the emirate, Creative, Arts and Entertainment activities are mainly concentrated in Abu Dhabi (downtown and Mussafah area), with important territorial saturation (up to 17 assets of the same type in the same city area). For a more detailed view, the mapping analysis is available upon request.

Creative, Arts and Entertainment Activities: Employment Estimates



According to this study's estimation, the average number of people employed in the Creative, Arts and Entertainment Activities sub-sector in Abu Dhabi is **5,324** (confidence interval: 4,244 - 6,493).

Cultural Education: Cluster Mapping

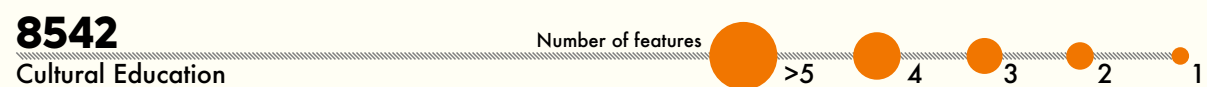


The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 4 Cultural Education clusters in Abu Dhabi



Map 5 Cultural Education clusters in Al Ain (right map) and in Al Dhafra (left map)

The Cultural Education assets are concentrated in Abu Dhabi city (especially in the Al Danah and Al Manhal areas and in the Mussafah community), with a clustering scale of up to five

assets are also developing in Al Ain city and Al Dhafra with smaller cluster nodes. For a more detailed view, the mapping analysis is available upon request.

Cultural Education: Employment Estimates



According to this study's estimation, the average number of people employed in the Cultural Education sub-sector in Abu Dhabi is **576** (confidence interval: 295 - 1,016).

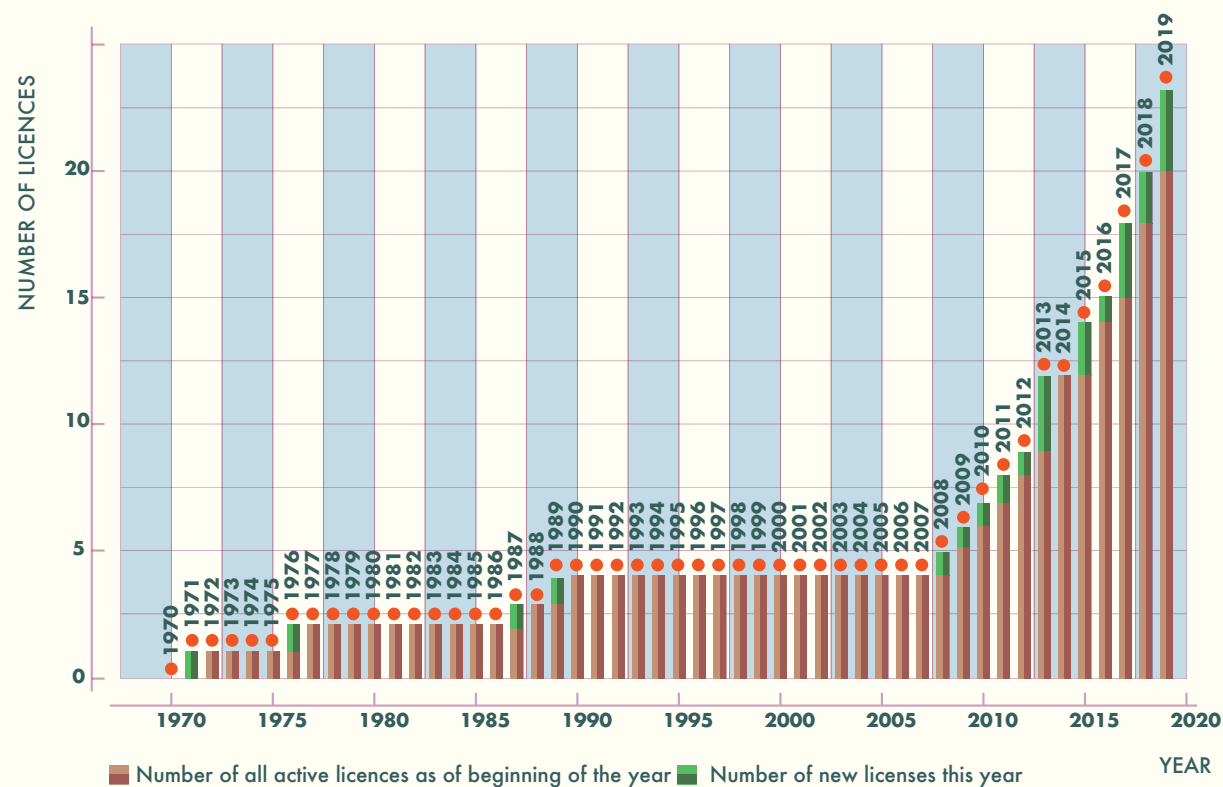
ISIC CODE 910 - LIBRARIES, ARCHIVES, MUSEUMS AND OTHER CULTURAL ACTIVITIES

Sub-Sector Development Statistics



This division includes activities of libraries and archives; the operation of museums of all kinds; and the operation of historical sites, etc. It also includes the preservation and exhibition of objects, sites and natural wonders of historical, cultural or educational interest (e.g. world heritage sites, etc.).

For the public assets (Abu Dhabi Museums, Archives, Libraries and Heritage sites), the relevant DCT data was collected. However, the data on the private museums (e.g. Abu Dhabi History Museum and Aquarium) as well as the private libraries is not always accurate. Consequently, at this stage of the work, the descriptive statistics are limited only by the scope of the verified data.



Data Visualisation - ISIC Code 910 - Libraries, Archives, Museums and Other Cultural Activities (1971-2020)

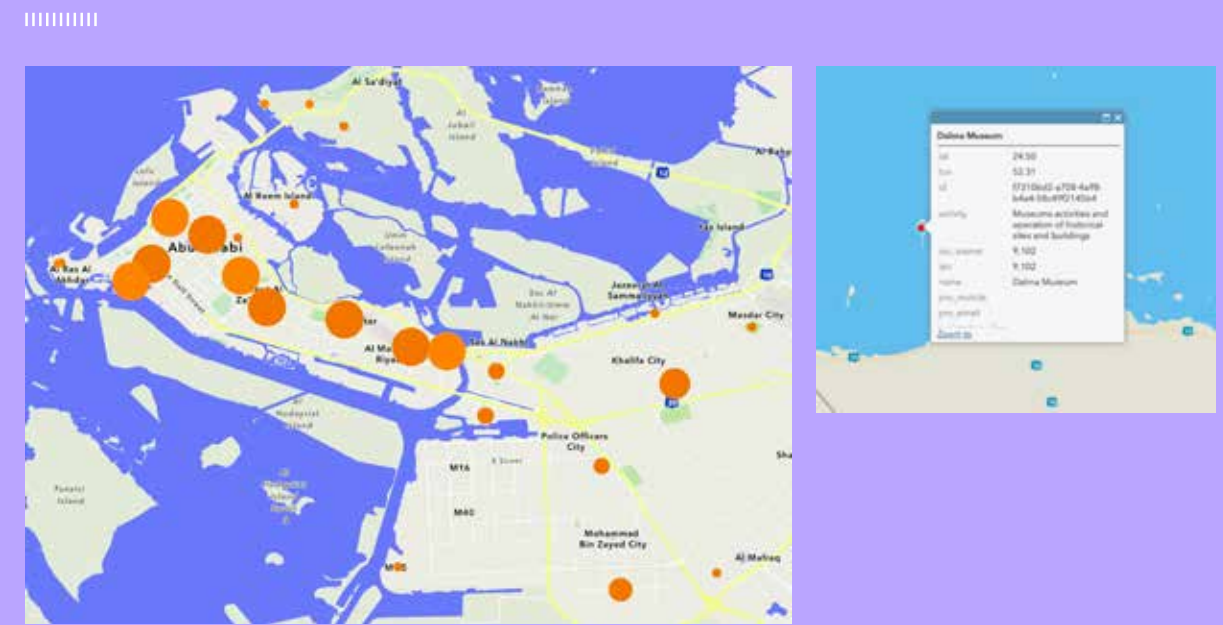
The first Libraries, Archives, Museums and Other Cultural Activities asset was registered in Abu Dhabi in 1971. In the period from 1989 to 2007, the number of assets of this type has been stable. The gradual sub-sector growth started in 2008 and dynamised further since 2017.

Libraries, Archives, Museums and Other Cultural Activities: Cluster Mapping

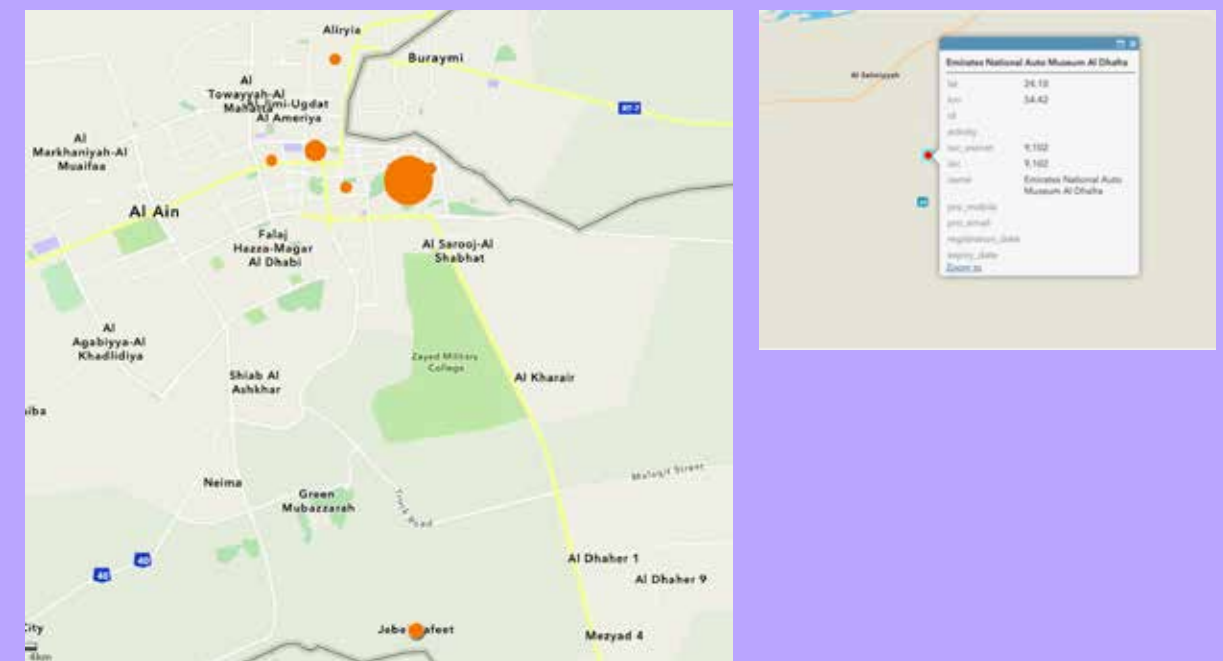
The map below displays the geospatial location of the private and public museums, libraries (six Public Libraries, the Children’s Library of the Cultural Foundation and 62 Private Libraries identified in Abu Dhabi) and heritage sites in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing

clustering dynamics (spatial proximity of the assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).

Libraries, Archives, Museums and Other Cultural Activities



Map 6 Libraries, Archives, Museums and Other Cultural Activities in Abu Dhabi



Map 7 Libraries, Archives, Museums and Other Cultural Activities in Al Ain and in Al Dhafra

Libraries, Archives, Museums and Other Cultural Activities is a generic category that unites heterogeneous entities that are managed by both private and public sectors. The coverage of the urban landscape of the Abu Dhabi city by the libraries is rather homogeneous, as many private libraries function alongside the private education establishments. The mapped Abu

Dhabi, Al Ain and Al Dhafra museums include the institutions managed by DCT Abu Dhabi but also several private establishments (e.g. Abu Dhabi History Museum and Aquarium [Khalifa Park], Al Ain Classic Car Museum, etc.).

Libraries, Archives, Museums and Other Cultural Activities: Employment Estimates



The available data includes the DCT Manpower data, the Manpower data of the six Public Libraries and the Children’s Library of the Cultural Foundation. The bootstrapping estimation approach simulated the data on the Private Libraries and the Private Museums.

According to this study’s estimation, the average number of people employed in the Libraries, Archives, Museums and Other Cultural Activities sub-sector in Abu Dhabi is **624** (confidence interval: 599 - 650).

ISIC CODE 5911 - MOTION PICTURE, VIDEO AND TELEVISION PROGRAMME PRODUCTION ACTIVITIES

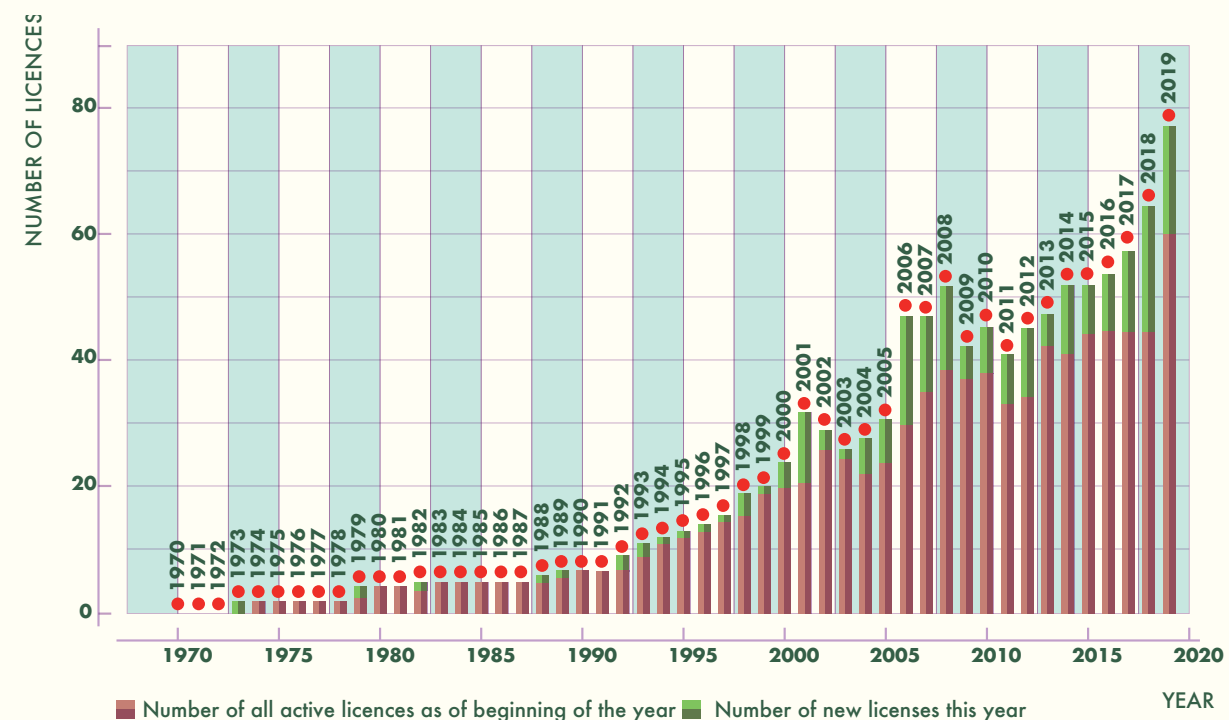
Sub-Sector Development Statistics



This class includes the production of motion pictures, videos, television programmes or television commercials.

as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences



Data Visualisation - ISIC Code 5911 - Motion Picture, Video and Television Programme Production in Abu Dhabi (1973-2020)

The first Motion Picture, Video and Television Programme Production asset was registered in Abu Dhabi in 1973. The growth of the sub-sector is not linear, with the evident growth being dynamic since 2017.

The list of enterprises that comprise part of twofour54 Community (N=480), provided by MZA, does not contain the variables that describe the activities of each enterprise. This data is tentatively included in this cartographic analysis in order to visualise the emerging clusters.¹⁰

The data analysed to describe the activities related to Motion Picture, Video and Television Production was provided by ADCCI and DED.

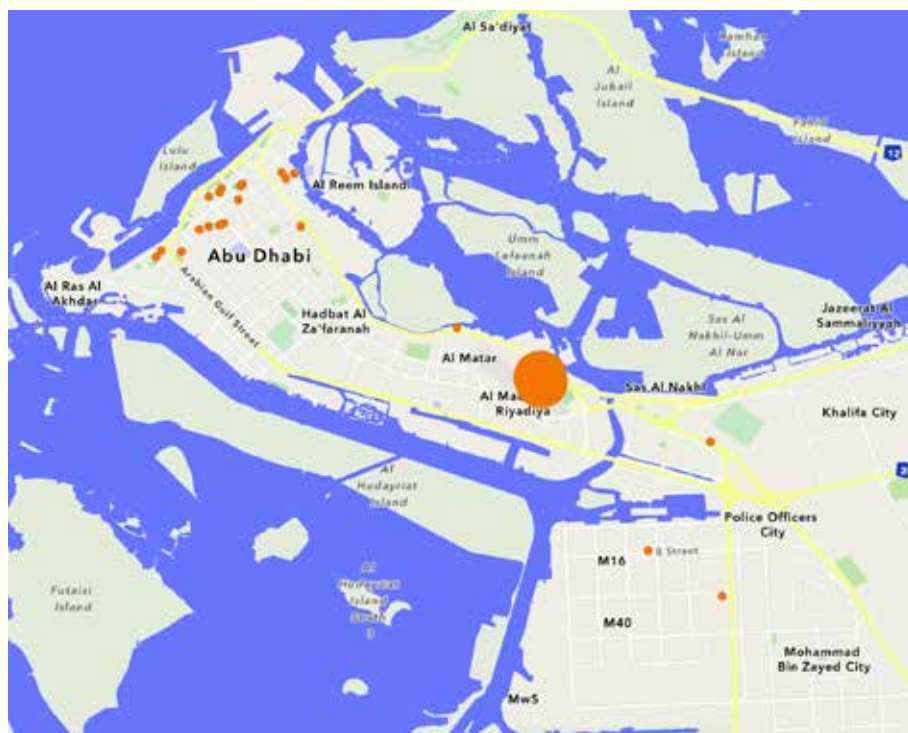
Motion Picture, Video and Television Production Activities: Cluster Mapping



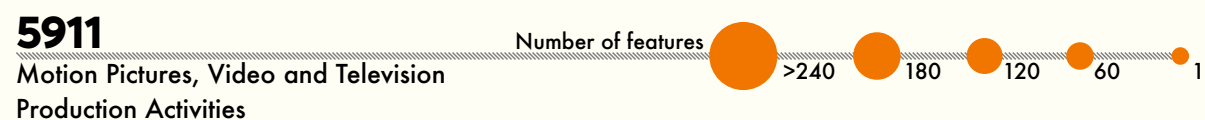
The maps below show the geospatial location of Motion Picture, Video and Television Production activities in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same type that tend to be

installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).

Code 5911 - Motion Picture, Video and Television Production Activities - Principal Clusters in the emirate of Abu Dhabi



Map 8 Motion Picture, Video and Television Programme Production clusters in Abu Dhabi



Map 9 Motion Picture, Video and Television Programme Production clusters in Al Ain

The Motion Picture, Video and Television Programme Production assets are mainly clustered in Abu Dhabi downtown, as well as in twofour54 Community. The identified assets do not have a strong clustering tendency, neither in Abu Dhabi (except twofour54 Community), nor in Al Ain.

Motion Picture, Video and Television Programme Production: Employment Estimates



According to this study's estimation, the average number of people employed in the Motion Picture, Video and Television Programme Production sub-sector in Abu Dhabi is **2,343** (confidence interval: 2,097 - 2,750). The list of enterprises that comprise part of twofour54

Community (N=480), provided by MZA, has been included in this estimation; however, supplementary data (ISIC codes of each company, number of permanent employees/freelancers, etc.) is needed in order to improve the result of the estimation.

ISIC CODE 5913 - MOTION PICTURE, VIDEO AND TELEVISION PROGRAMME DISTRIBUTION ACTIVITIES

Sub-Sector Development Statistics



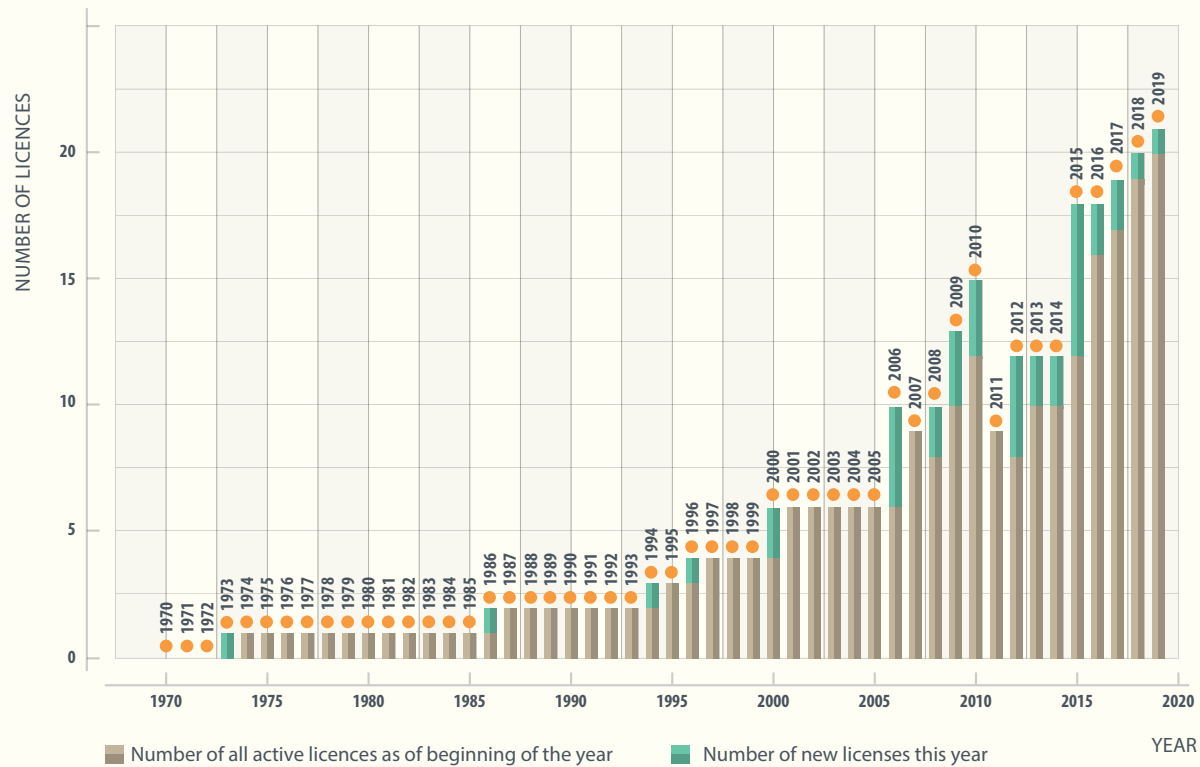
This class includes:

- Distributing film, videotapes, DVDs and similar productions to motion picture theatres, television networks and stations and exhibitors.
- Acquiring film, videotape and DVD distribution rights.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the start of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



¹⁰ A discussion with MZA needs to be continued in 2021 to better define the sub-sectors of the MZA enterprises. For this reason, in order to avoid any confusion, the MZA data is not included in the chart above.



Data Visualisation - ISIC Code 5913 - Motion Picture, Video and Television Programme Distribution Activities in Abu Dhabi (1973-2020)

Motion Picture, Video and Television Programme Distribution activities assets have been registered in Abu Dhabi since 1973. Since 2015, the growth of this sub-sector has intensified. Our data contains the information on

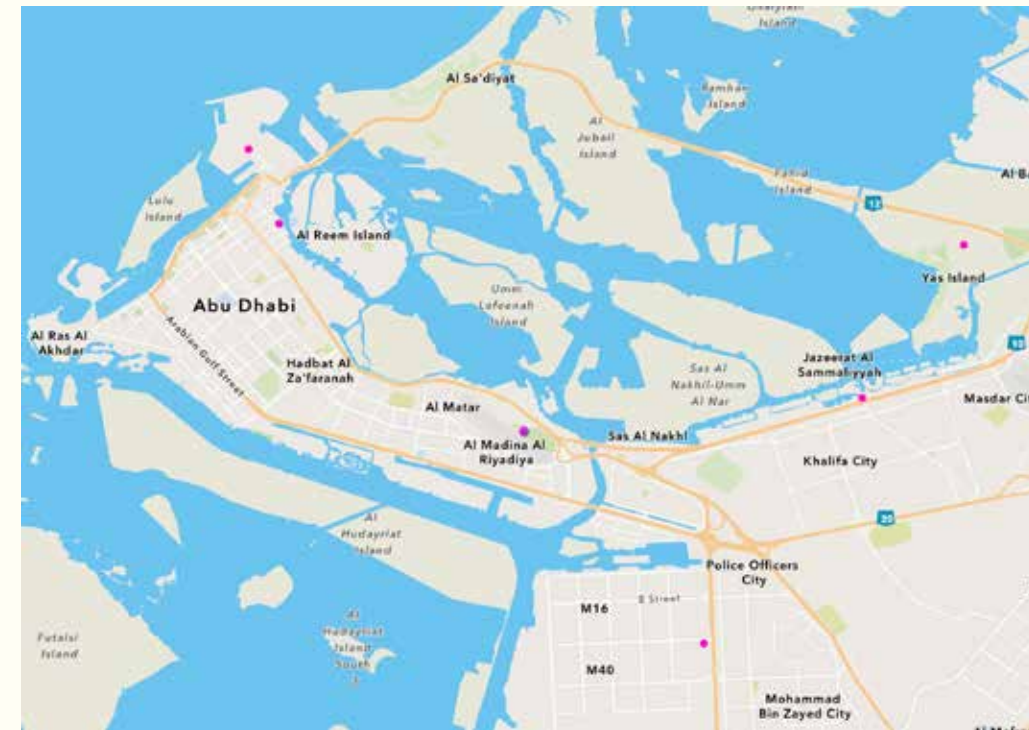
21 assets in 2020, but as the data provided by MZA does not contain ISIC codes, it is assumed that several businesses have not been included in this analysis.

Motion Picture, Video and Television Programme Distribution Activities: Cluster Mapping



The maps below illustrate the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the

assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 10 Motion Picture, Video and Television Programme Distribution clusters in Abu Dhabi

5913

Motion Pictures, Video and Television Programme Distribution Activities



Map 11 Motion Picture, Video and Television Programme Distribution clusters in Al Ain

Motion Picture, Video and Television Programme Distribution activities assets have no evident tendency to group closely to each other. Instead, these activities are localised independently in distanced areas of Abu Dhabi city and Al Ain.

However, the supplementary data collection might make the current mapping outcome more precise.

Motion Picture, Video and Television Programme Distribution: Employment Estimates

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According to this study's estimation, the average number of people employed in the Motion Picture, Video and Television Programme Distribution sub-sector in Abu Dhabi is **106** (confidence interval: 36 - 318). The list of enterprises that comprise part of twofour54 Community (N=480), provided by MZA, has not

been included in this estimation, as the overall number of the companies specialised in Motion Picture, Video and Television Programme Distribution has not been identified.

ISIC CODE 5914 - MOTION PICTURE PROJECTION ACTIVITIES

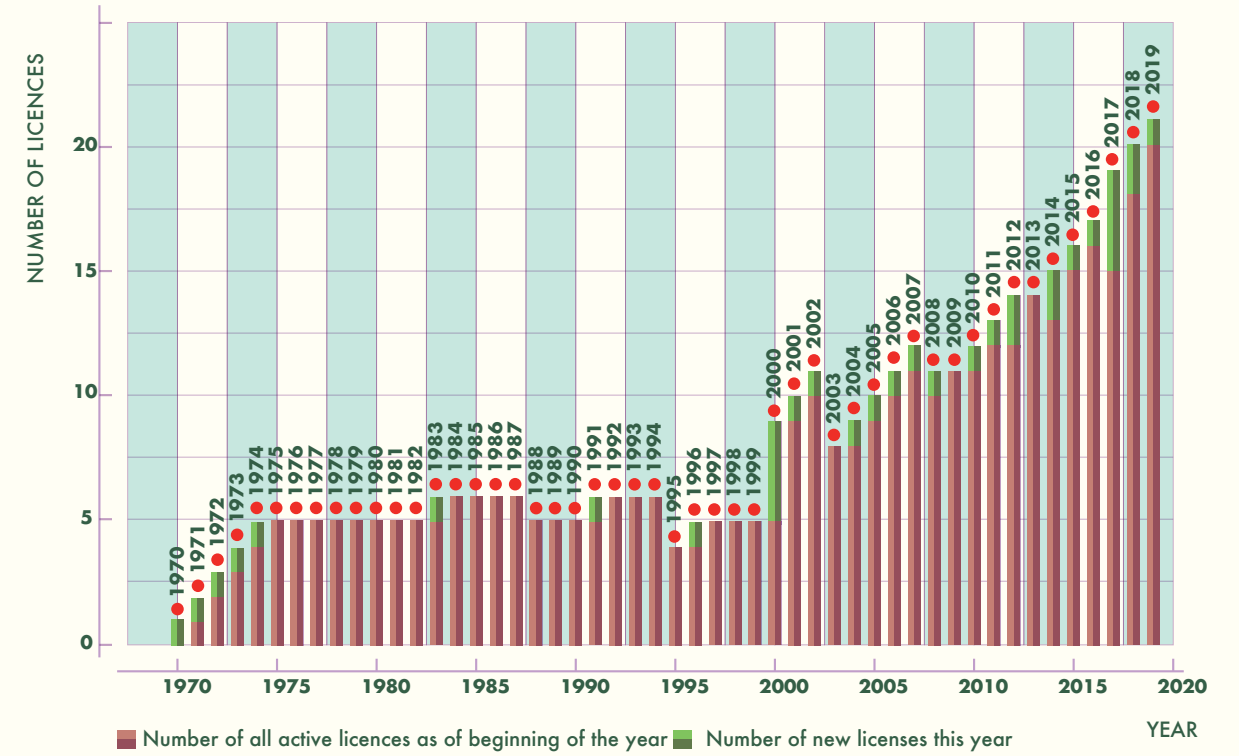
Sub-Sector Development Statistics

|||||||

This class includes:

- Motion picture or videotape projection in cinemas, in the open air or in other projection facilities.
- Activities of cine-clubs.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 5914 - Motion Picture Projection Activities in Abu Dhabi (1970-2020)

Motion Picture Projection Activities assets have been registered in Abu Dhabi since 1970. The growth of the sub-sector is linear since 2000; the only year of relative crisis (characterised by

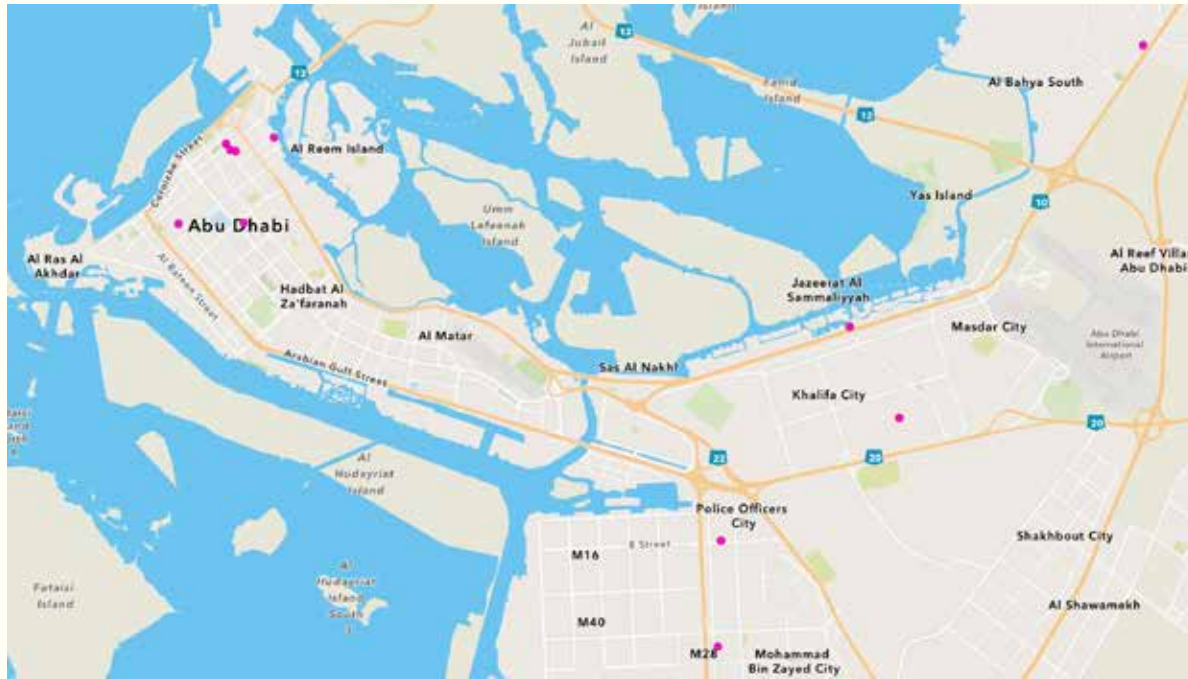
the absence of new licences) was in 2003. For today, 21 relevant entities with active licences were identified.

Motion Picture Projection Activities: Cluster Mapping

|||||||

The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 12 Motion Picture Projection Activities in Abu Dhabi

5914
Motion Picture Projection Activities



Map 13 Motion Picture Projection Activities in Al Ain

Motion Picture Projection Activities assets are dispersed rather consistently in the urban areas of Abu Dhabi and in Al Ain. They are not clustered, which corresponds to the nature of their activities. Indeed, in some cases, an excessive clustering, (e.g. a strong concentration of cinemas in the

same neighbourhood of the city) might even become an issue for urban policymakers who seek a more homogeneous territorial distribution of cultural resources.

Motion Picture Projection Activities: Employment Estimates

The available data does not allow proper employment estimates in the Motion Picture Projection Activities sub-sector. The focus of this study is on the collection of the relevant data in order to improve the analysis.

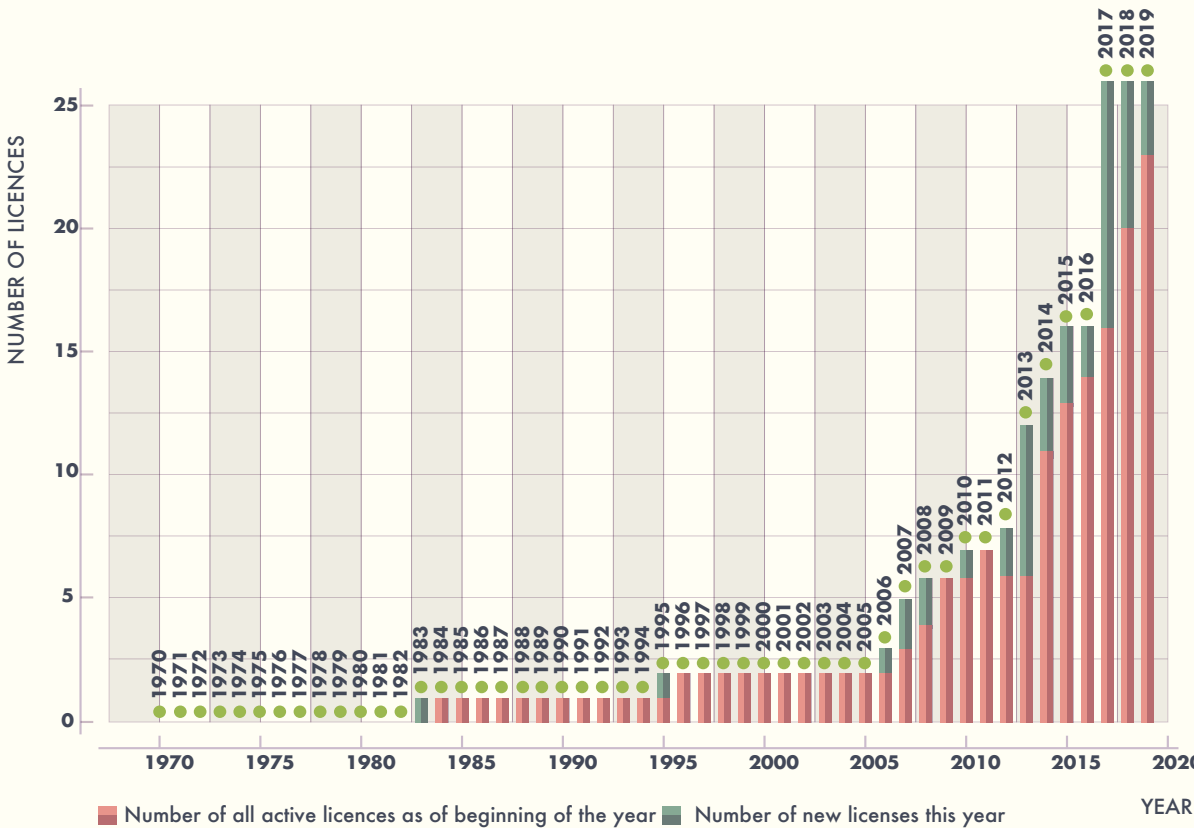
ISIC CODE 5820 - SOFTWARE PUBLISHING

Sub-Sector Development Statistics

This class includes:
Publishing of ready-made (non-customised) software:

- Operating systems.
- Business and other applications.
- Computer games for all platforms.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 5820 - Software Publishing in Abu Dhabi (1983-2020)

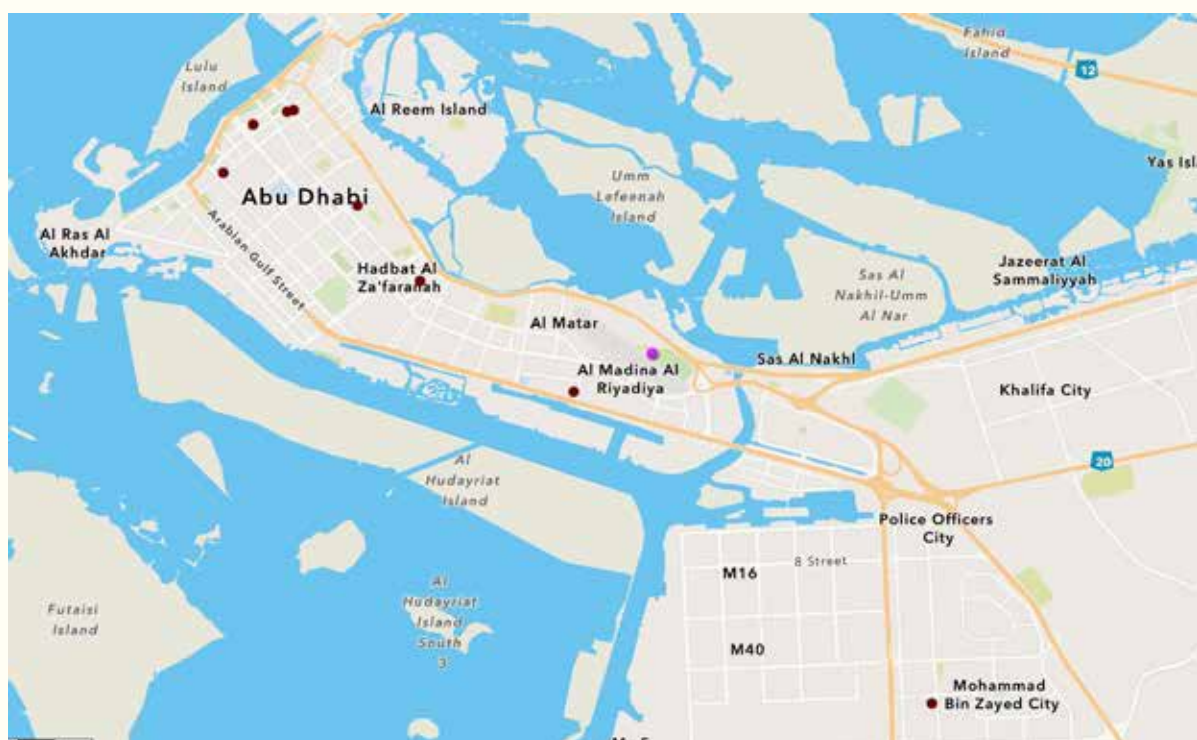
Software Publishing assets have been registered in Abu Dhabi since 1983. In 2013, the sub-sector growth intensified; as per the available data, since 2017, the number of Software Publishing assets has stayed stable (26).

Software Publishing: Cluster Mapping



The maps below indicate the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 14 Software Publishing in Abu Dhabi

5820 Software Publishing

In the emirate of Abu Dhabi, the Software Publishing assets are mainly concentrated in Abu Dhabi city. Clustering tendencies are not observable.

Software Publishing: Employment Estimates



According to this study's estimation, the average number of people employed in the Software Publishing sub-sector in Abu Dhabi is **103** (confidence interval: 35 - 312).

ISIC CODE 7410 - SPECIALISED DESIGN ACTIVITIES

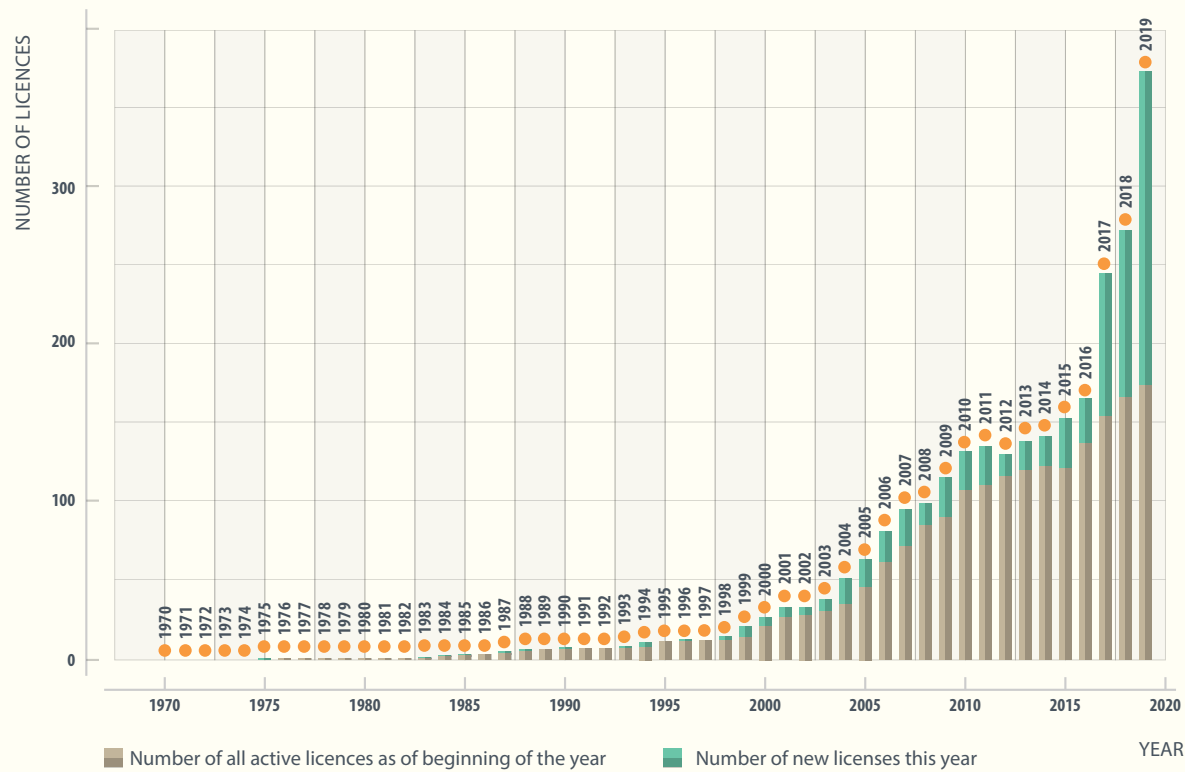
Sub-Sector Development Statistics



This class includes:

- Fashion design related to textiles, apparel, shoes, jewellery, furniture and other interior decoration and other fashion goods as well as other personal or household goods.
- Industrial design, i.e. creating and developing designs and specifications that optimise the use, value and appearance of products, including the determination of the materials, construction, mechanism, shape, colour and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal and efficiency in production, distribution, use and maintenance.
- Activities of graphic designers.
- Activities of interior decorators.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 7410 - Specialised Design Activities in Abu Dhabi (1975-2020)

Specialised Design Activities assets have been registered in Abu Dhabi since 1975. The number of new licences started to increase in 1999, with an accelerated sub-sector growth since 2017. The data overview shows that the Specialised Design Activities sub-sector integrates, among others, a large scope of activities that might not be perceived as being part of the 'cultural' scope by the concerned actors themselves (e.g. tailoring, kandoora design, etc.). Also, there is an overlapping of this sub-sector with ISIC Code

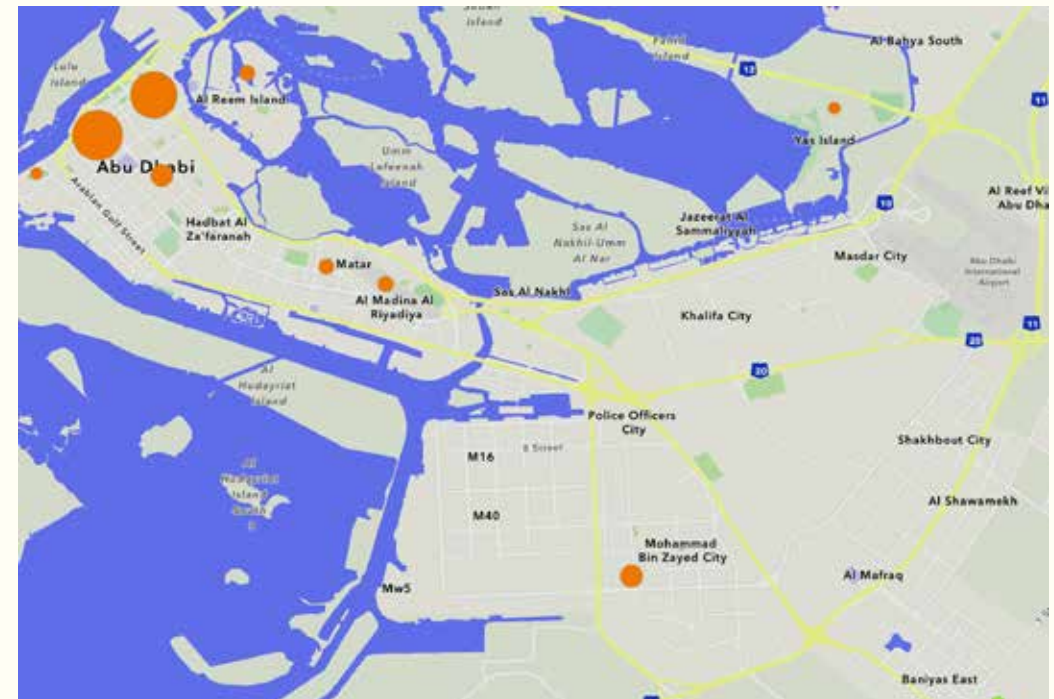
3211 - Manufacture of Jewellery and Related Articles. A qualitative survey is recommended in order to understand the Specialised Design Activities sub-sector morphology in more detail. As per the data received in June 2020, 372 Specialised Design Activities assets in the emirate of Abu Dhabi were identified.

Specialised Design Activities: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).

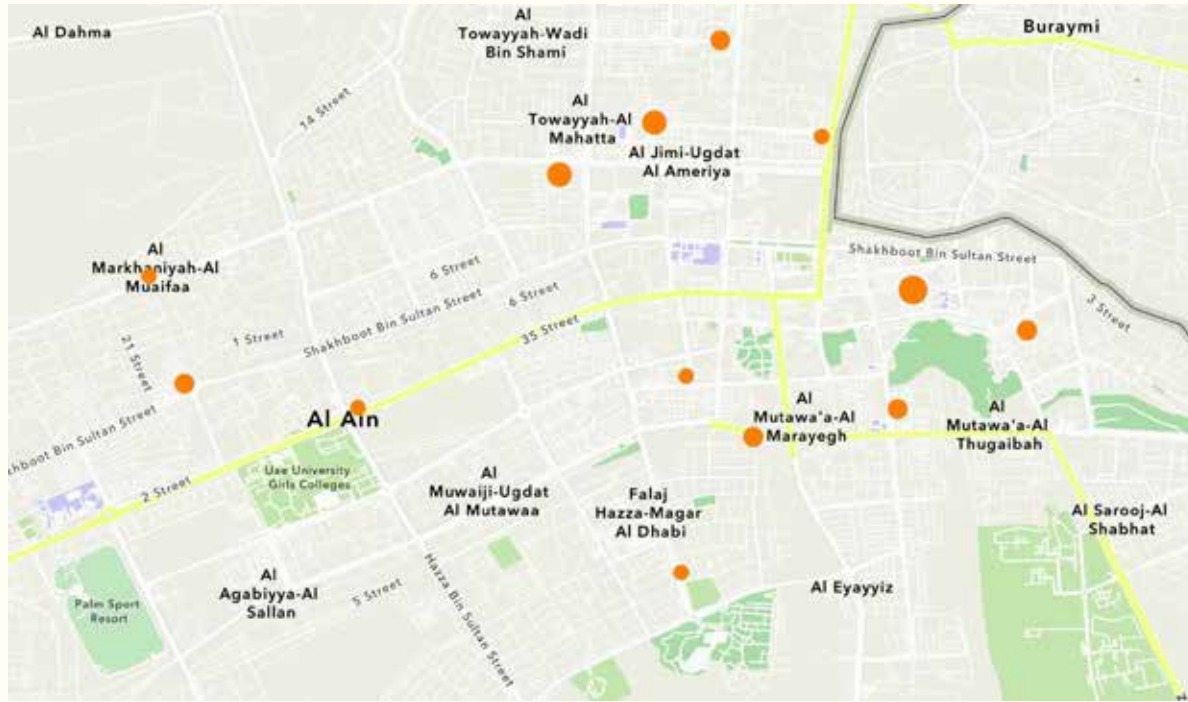


Map 15 Specialised Design Activities in Abu Dhabi

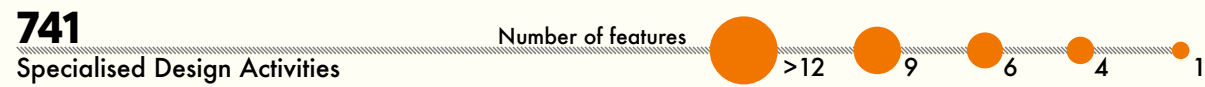


Specialised Design Activities in Abu Dhabi Downtown (important saturation in this area)





Map 17 Specialised Design Activities in Al Ain

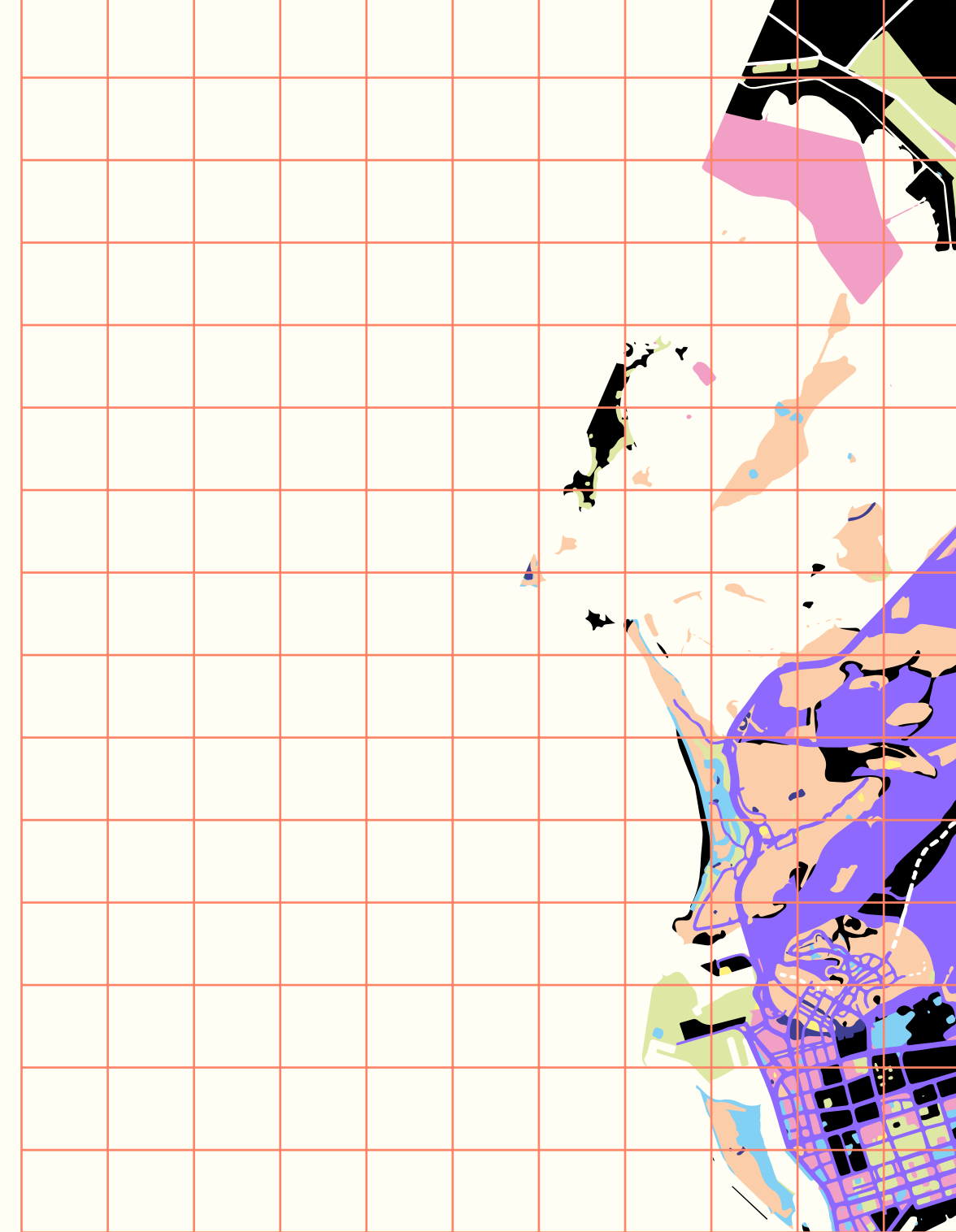


In Abu Dhabi city, the Al Hosn and Al Markaziya areas are the most saturated in Specialised Design Activities with territorial clustering of up to 12 entities in a cluster. In Al Ain, Specialised Design Activities are concentrated between the Al Tiwayyah and Al Khibeesi areas, as well as in Al Jahli.

Specialised Design Activities: Employment Estimates



According to this study's estimation, the average number of people employed in the Specialised Design Activities sub-sector in Abu Dhabi is 3,474 (confidence interval: 2,594 - 4,412). However, the non-cultural assets employing designers (e.g. engineering, architecture firms, real estate, etc.) were not included in the estimation, as this is a separate research topic that requires a different and specific approach.





Stably Developing Abu Dhabi Cultural Assets

ISIC CODE 7310 – ADVERTISING

Sub-Sector Development Statistics

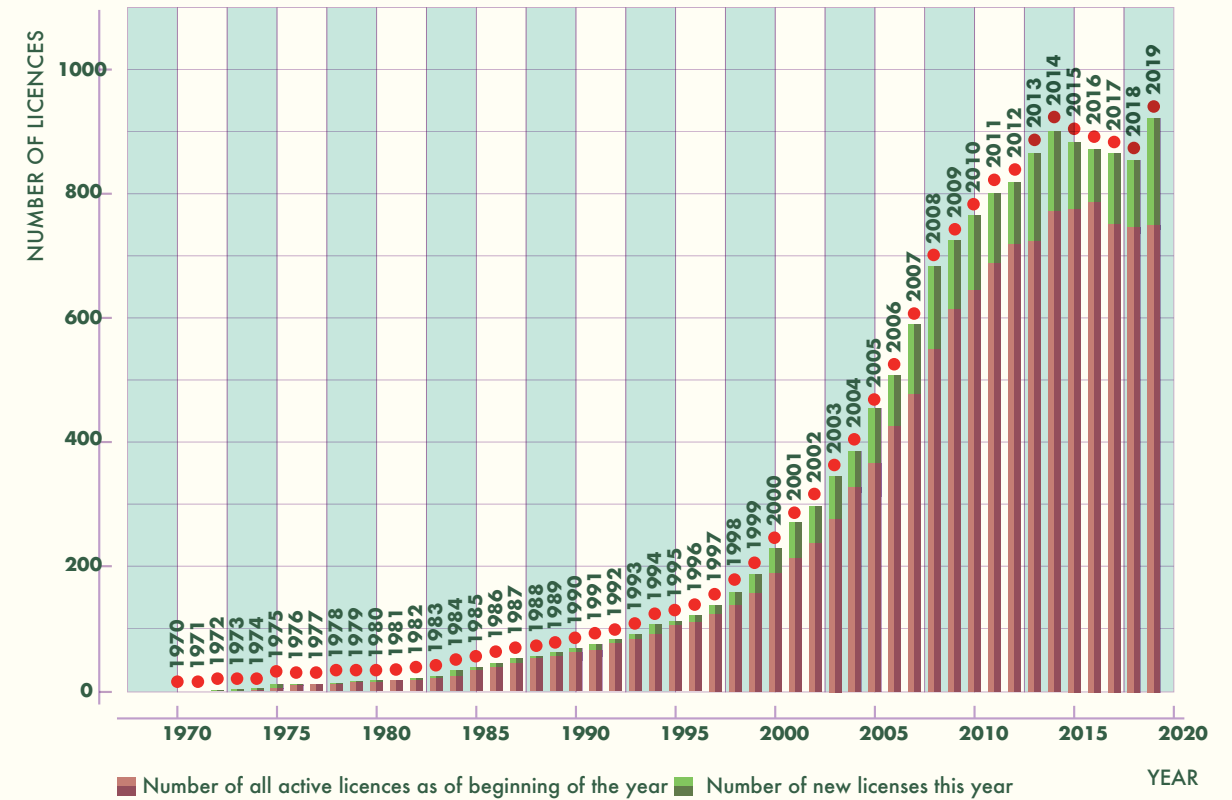


This class includes the provision of a full range of advertising services (i.e. through in-house capabilities or subcontracting), including advice, creative services, production of advertising material, media planning and buying.

This class includes:

- Creation and realisation of advertising campaigns:
- Creating and placing advertising in newspapers, periodicals, radio, television, the Internet and other media.
- Creating and placing of outdoor advertising, e.g. billboards, panels, bulletins and frames, window dressing, showroom design, car and bus carding, etc.
- Media representation, e.g. sale of time and space for various media soliciting advertising.
- Aerial advertising.
- Distribution or delivery of advertising material or samples.
- Provision of advertising space on billboards, etc.
- Creation of stands and other display structures and sites.
- Conducting marketing campaigns and other advertising services aimed at attracting and retaining customers:
- Promotion of products.
- Point-of-sale marketing.
- Direct mail advertising.
- Marketing consulting.

The chart below illustrates the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the start of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 7310 – Advertising in Abu Dhabi (1972-2020)

Advertising assets have been registered in Abu Dhabi since 1972, with intensive growth starting from 1999–2000. However, after a peak year in 2014, the number of Advertising assets started to slightly decrease. At the same time, the Advertising sub-sector cannot be perceived as

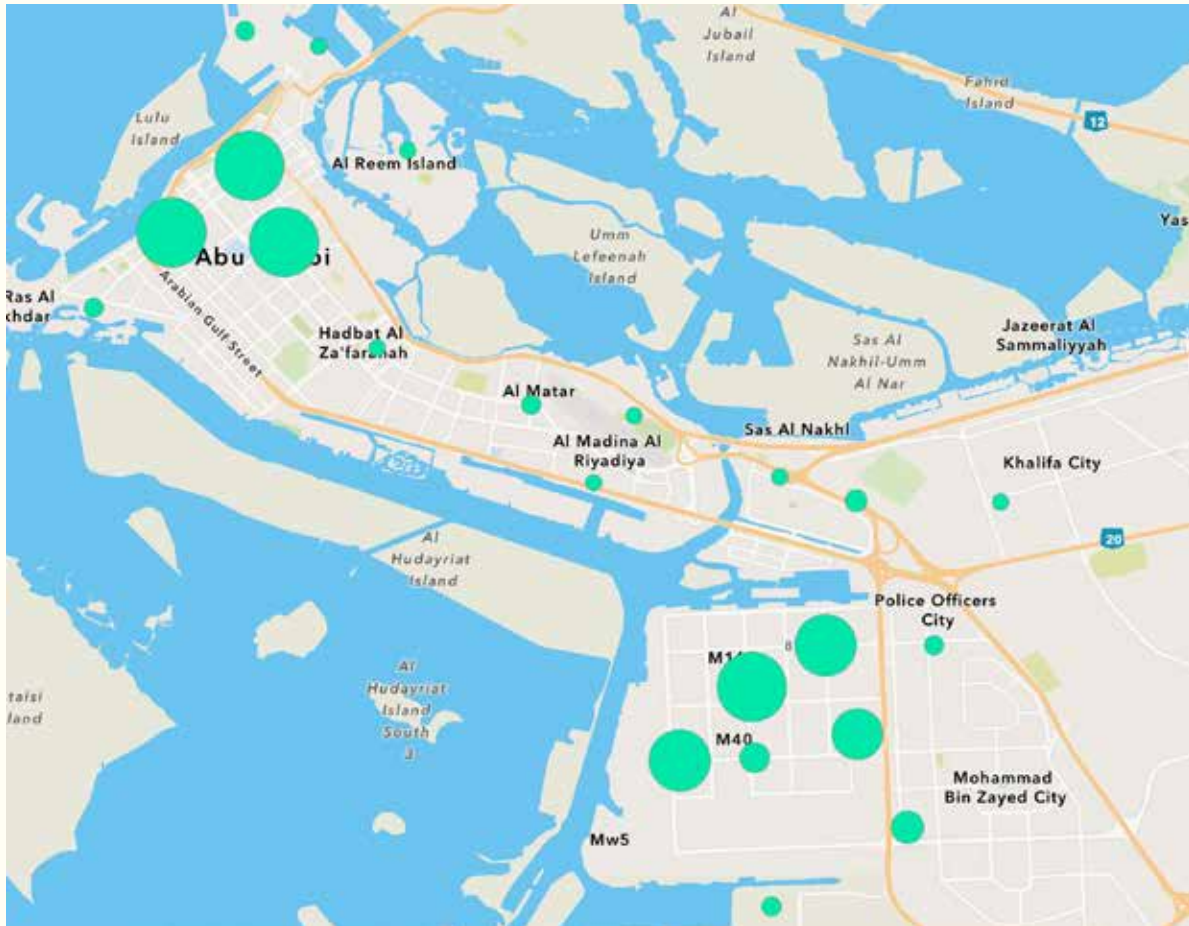
stagnating, because of (1) a significant overall number of businesses (926) in 2020, and (2) a gradual increase in new licences in 2019.

Advertising: Cluster Mapping

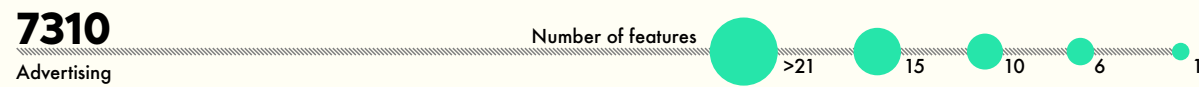


The maps below show the geospatial location of the relevant cultural assets in Abu Dhabi emirate. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same type that

tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 18 Advertising in Abu Dhabi



Map 19 Advertising in Al Ain (left map) and in Al Dhafra (right map)

The Advertising activities have a strong tendency to be clustered in the same areas of Abu Dhabi city (especially in the city downtown and in Mussafah area) and in Al Ain (Al Eyayyiz area) with the clustering scale of up to 21 entities in the same territorial node. In the Al Dhafra area, the Advertising activities are concentrated in the area between Al Madeenah and Bad' Saif street.

Advertising: Employment Estimates



According to this study's estimation, the average number of people employed in the Advertising sub-sector in Abu Dhabi is **5,077** (confidence interval: 4,065 - 6,329).

ISIC CODE 5811 - BOOK PUBLISHING

Sub-Sector Development Statistics



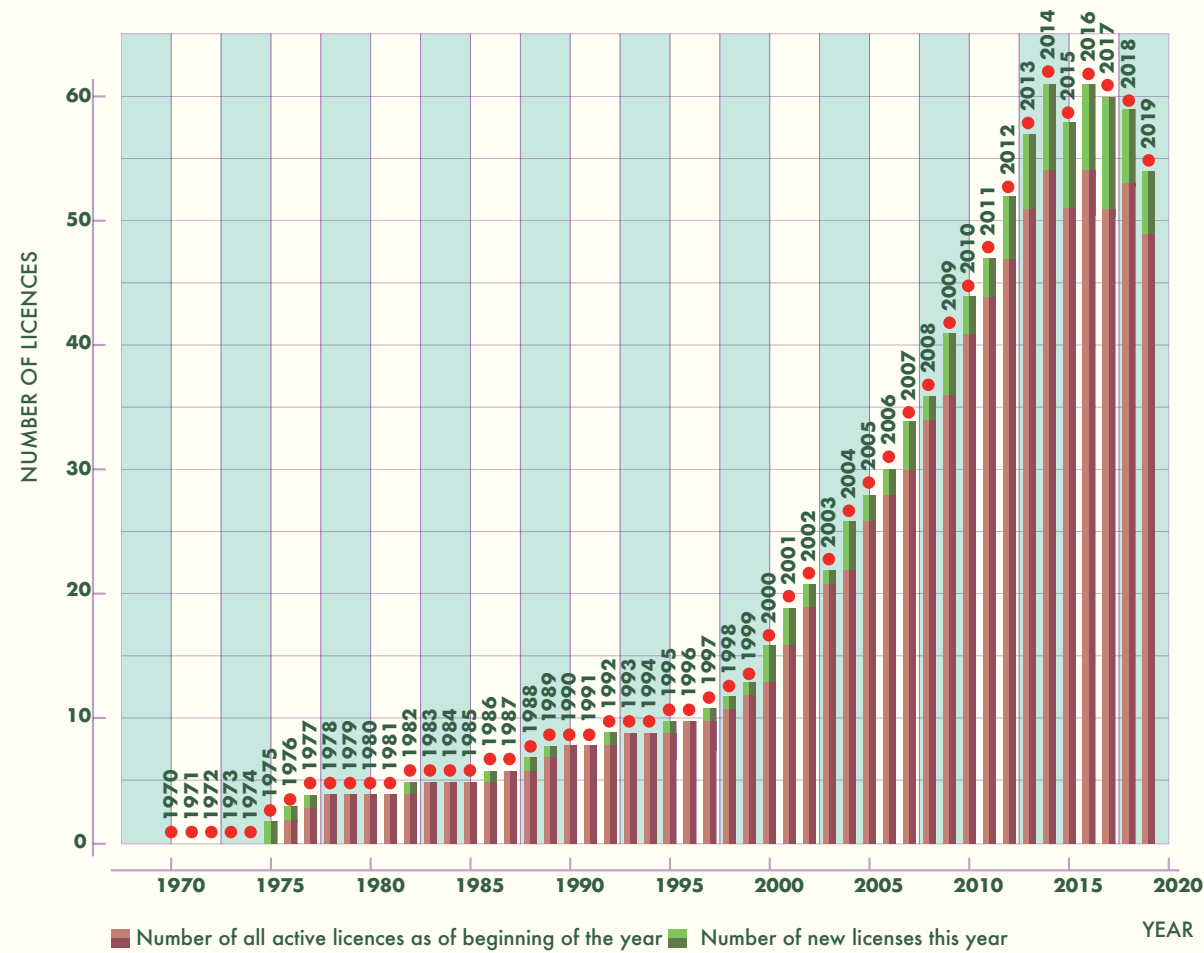
This class includes the activities of publishing books in print, electronic (CD, electronic displays, etc.) or audio form or on the Internet.

This class includes:

- Publishing of books, brochures, leaflets and similar publications, including publishing of dictionaries and encyclopaedias.
- Publishing of atlases, maps and charts.
- Publishing of audiobooks.
- Publishing of encyclopaedias, etc. on CD-ROM.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in

brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 5811 - Book Publishing in Abu Dhabi (1975-2020)

The first Book Publishing assets were registered in Abu Dhabi in 1975. Since then, the sub-sector growth has been stable, with a particular increase of licences in 1999-2000. However, after the peak years in 2014 and 2016, the overall number of Publishing assets started to decrease. In 2020, 54 active assets were

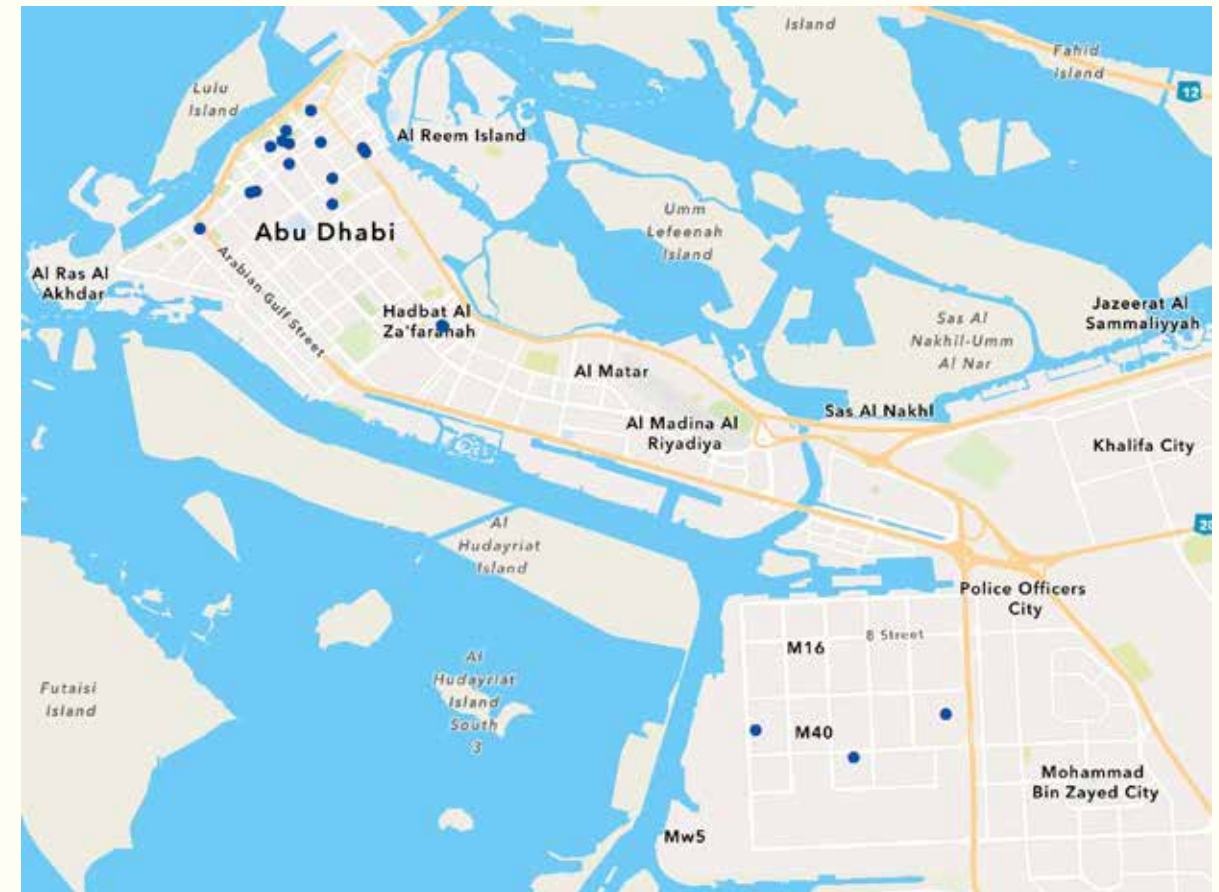
identified, whereas during the peak years, the number of active assets exceeded 60. However, the overall sub-sector dynamic is not stagnating.

Book Publishing: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in Abu Dhabi emirate. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same type that

tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 20 Book Publishing in Abu Dhabi

5811

Book Publishing



Map 21 Book Publishing in Al Ain

The Book Publishing sub-sector has a slight tendency for clustering, with most of the assets concentrated in Abu Dhabi downtown. We have also mapped three Book Publishing amenities in the Mussafah area and in Al Ain.

Book Publishing: Employment Estimates



According to this study's estimation, the average number of people employed in the Book Publishing sub-sector in Abu Dhabi is **221** (confidence interval: 92 - 535).

ISIC CODE 5819 - OTHER PUBLISHING ACTIVITIES

Sub-Sector Development Statistics

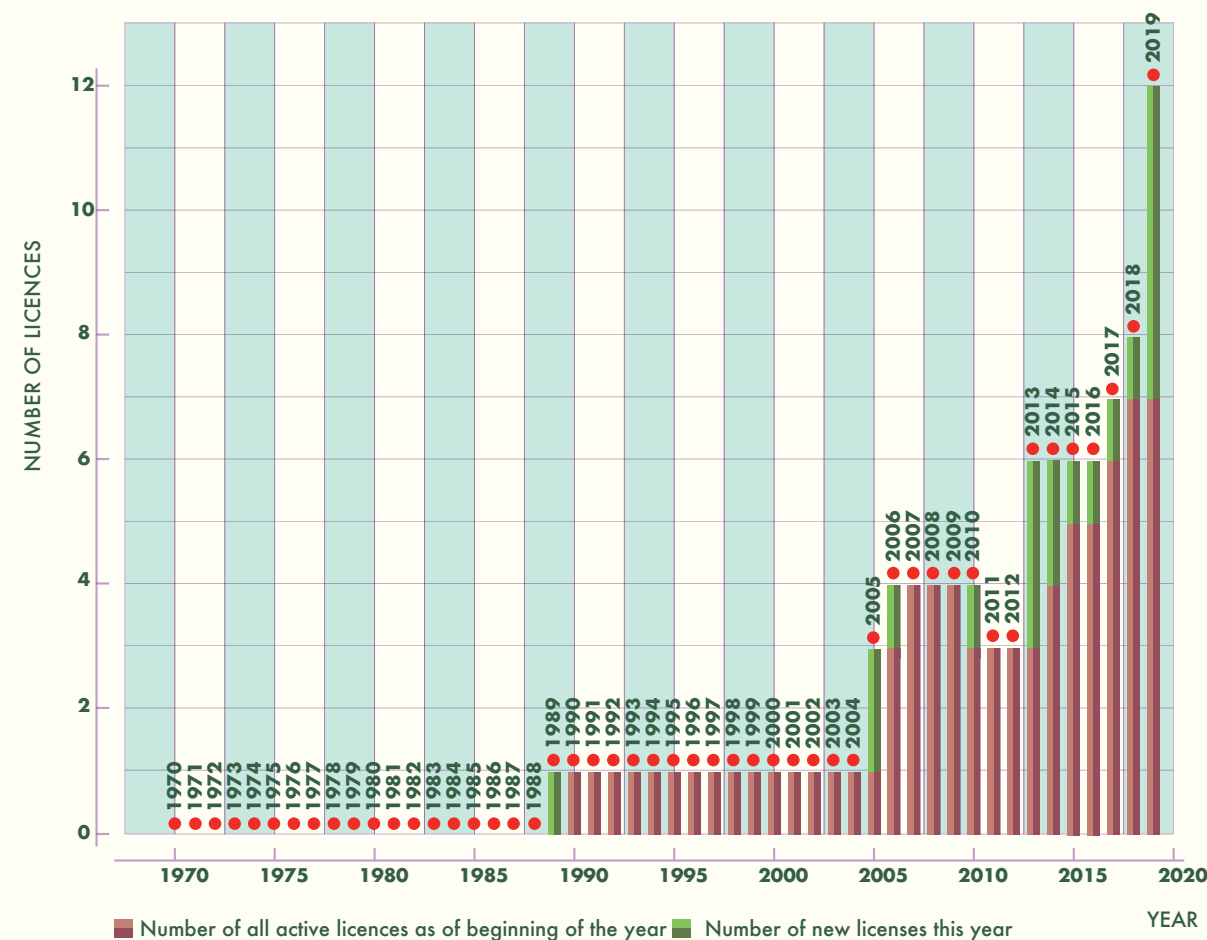


This class includes:

- Publishing (including online) of:
- Catalogues.
- Photos, engravings and postcards.
- Greeting cards.
- Forms.
- Posters, reproduction of works of art.
- Advertising material.
- Other printed matter.
- Online publishing of statistics or other information.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in

brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 5819 - Other Publishing Activities in Abu Dhabi (1989-2020)

Other Publishing Activities have been registered in Abu Dhabi since 1988. The sub-sector is developing stably, with an increase of the overall number of assets in 2019 (from eight to 12 licences). The lack of data on the location of assets of this type prevented a cartographic analysis.

Other Publishing Activities: Employment Estimates



According to this study's estimation, the average number of people employed in the Other Publishing Activities sub-sector in Abu Dhabi is **78** (confidence interval: 23 - 275).

ISIC CODE 5912 - MOTION PICTURE, VIDEO AND TELEVISION PROGRAMME POST-PRODUCTION ACTIVITIES

Sub-Sector Development Statistics

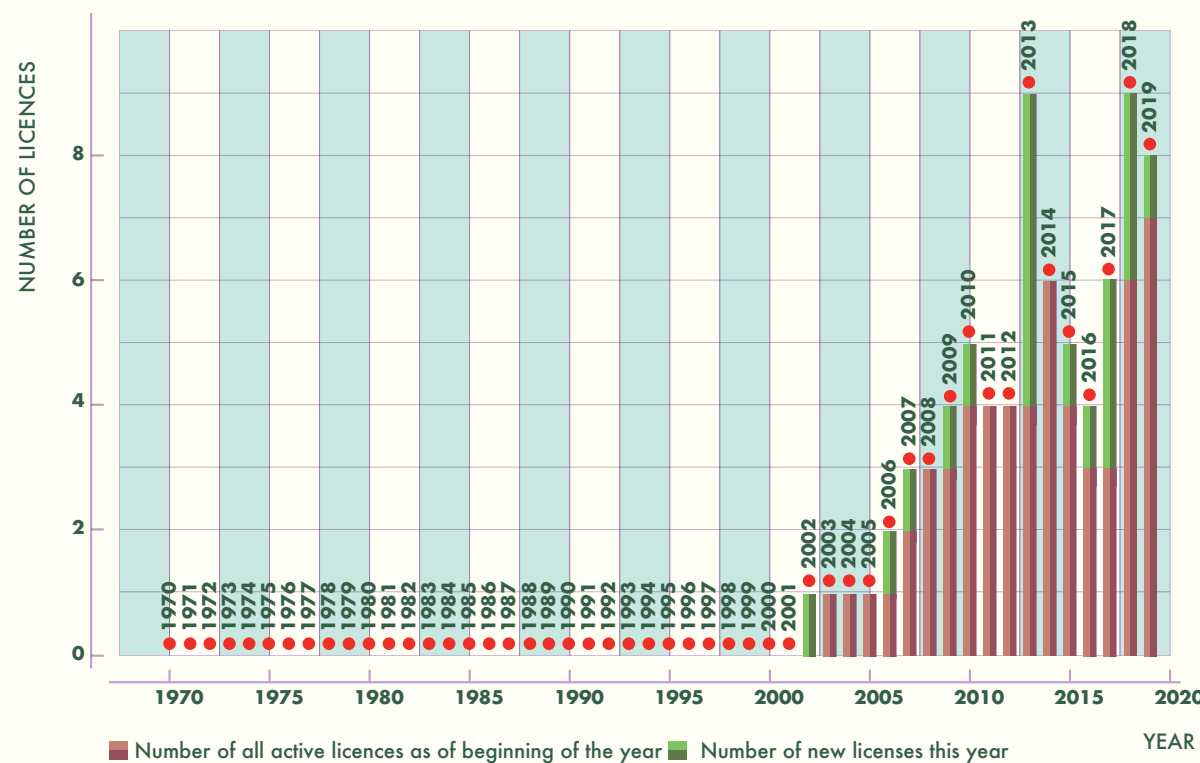


This class includes post-production activities such as:

- Editing, titling, subtitling, credits.
- Closed captioning.
- Computer-produced graphics, animation and special effects.
- Film/tape transfers.
- Activities of motion picture film laboratories and activities of special laboratories for animated films:
- Developing and processing motion picture film.
- Reproduction of motion picture film for theatrical distribution.
- Activities of stock footage film libraries, etc.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in

brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 5912 - Motion Picture, Video and Television Programme Post-Production Activities in Abu Dhabi (2002-2020)

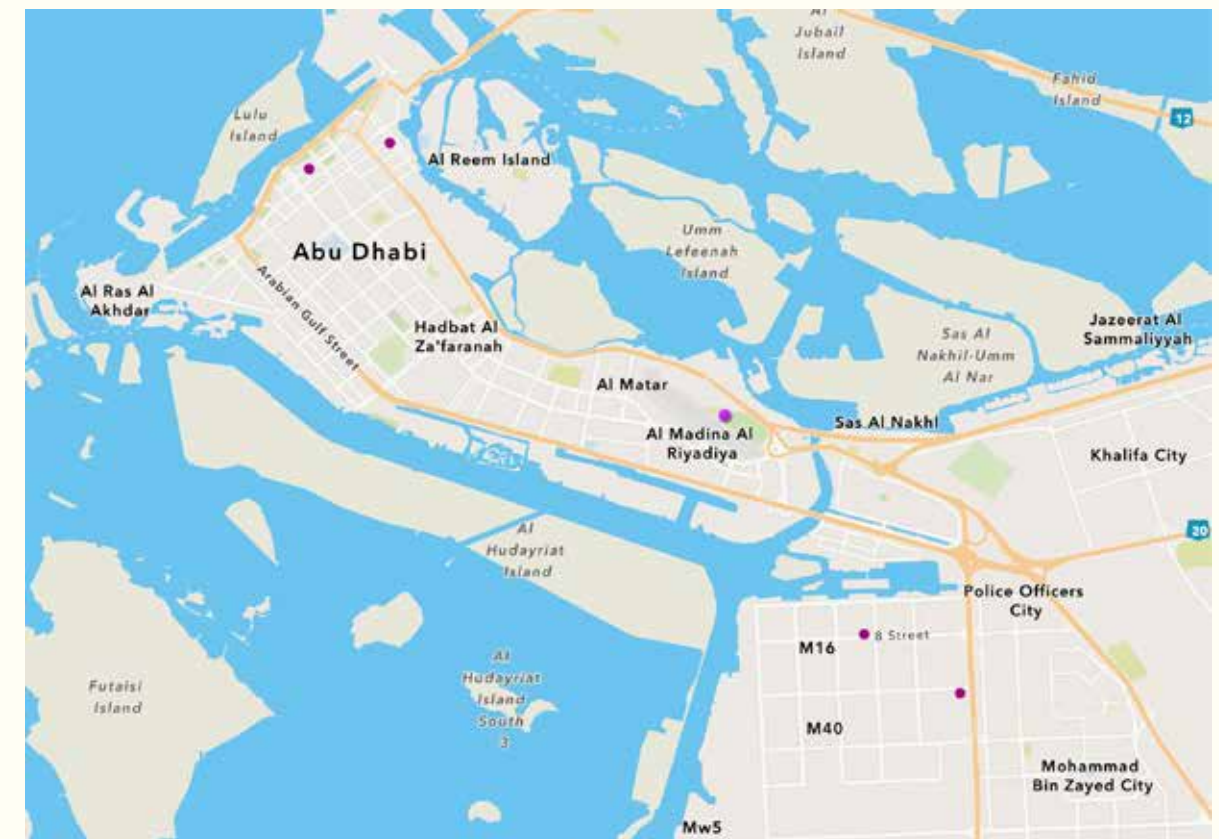
Motion Picture, Video and Television Programme Post-Production Activities is a relatively recent sub-sector; the first asset of this type was registered in Abu Dhabi in 2002. After the peak years in 2013 and 2018 (nine licenses), the overall number of the assets has decreased. However, the overall dynamics of the sub-sector do not qualify it as stagnating.

Motion Picture, Video and Television Programme Post-Production Activities: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 22 Motion Picture, Video and Television Programme Post-Production Activities in Abu Dhabi

5912

Motion Picture, Video and Television Programme Post-Production Activities

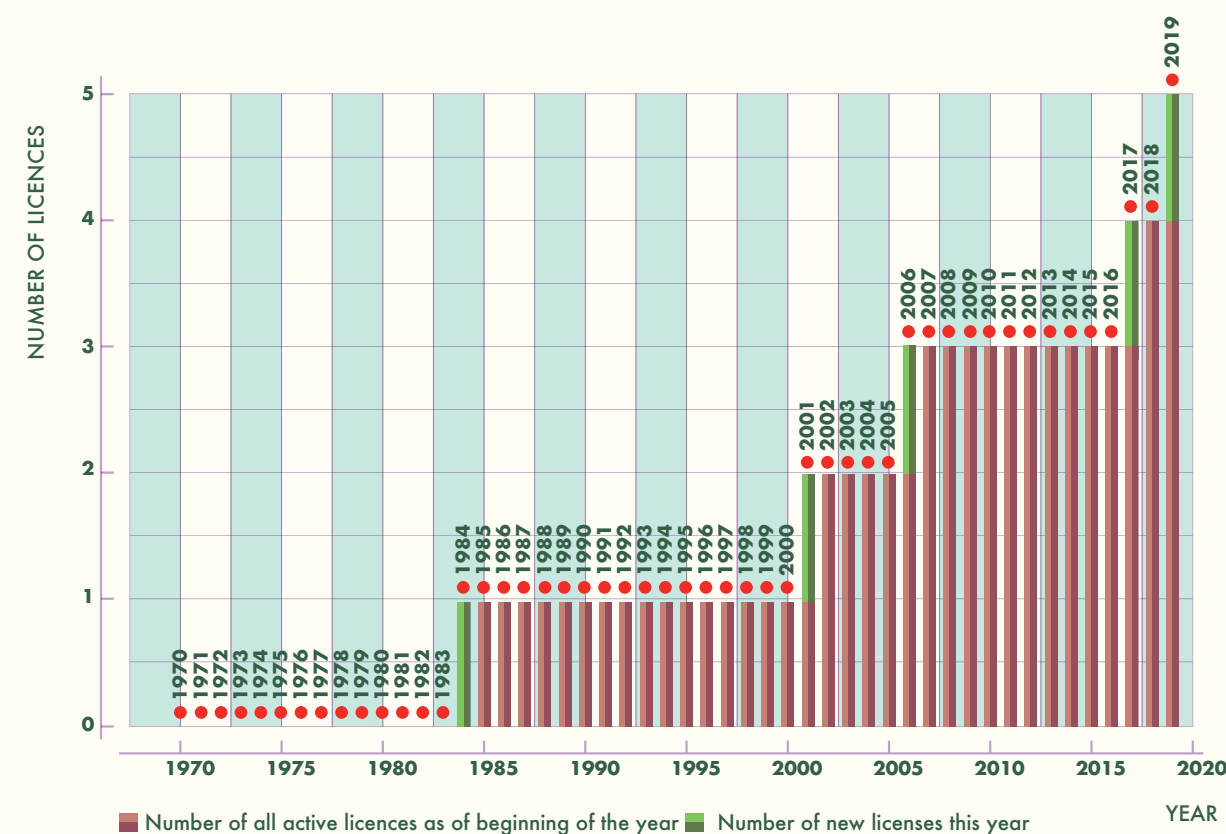
Motion Picture, Video and Television Programme Post-Production Activities are mainly concentrated in Abu Dhabi downtown and in the Mussafah area. The data overview shows that there might be activities of this type concentrated in the twofour45 Community. However, supplementary data needs to be collected to confirm this assumption.

Motion Picture, Video and Television Programme Post-Production Activities: employment estimates



According to this study's estimation, the average number of people employed in the Motion Picture, Video and Television Programme Post-Production Activities sub-sector in Abu Dhabi is **109** (confidence interval: 72 - 294). The list of enterprises that comprise part of the twofour54 Community (N=480), provided by MZA, has

been included in this estimation. However, the supplementary data (ISIC codes of each company, number of permanent employees/freelancers, etc.) is necessary in order to improve the result of the estimation.



Data Visualisation ISIC Code 6391 - News Agency Activities in Abu Dhabi (1984-2020)

The News Agency Activities are registered in Abu Dhabi since 1984, with the new licences attributed mainly in 2001, 2006 and 2017. In 2019, five assets of this type were identified in Abu Dhabi.

The lack of data on the location of assets of this type prevented a cartographic analysis.

News Agency Activities Employment Estimates



According to this study's estimation, the average number of people employed in the News Agency Activities sub-sector in Abu Dhabi is **21** (confidence interval: 3 - 180).

ISIC CODE 6391 - NEWS AGENCY ACTIVITIES

Sub-Sector Development Statistics



This class includes news syndicate and news agency activities providing news, pictures and features to the media.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.

ISIC CODE 7420 - PHOTOGRAPHIC ACTIVITIES

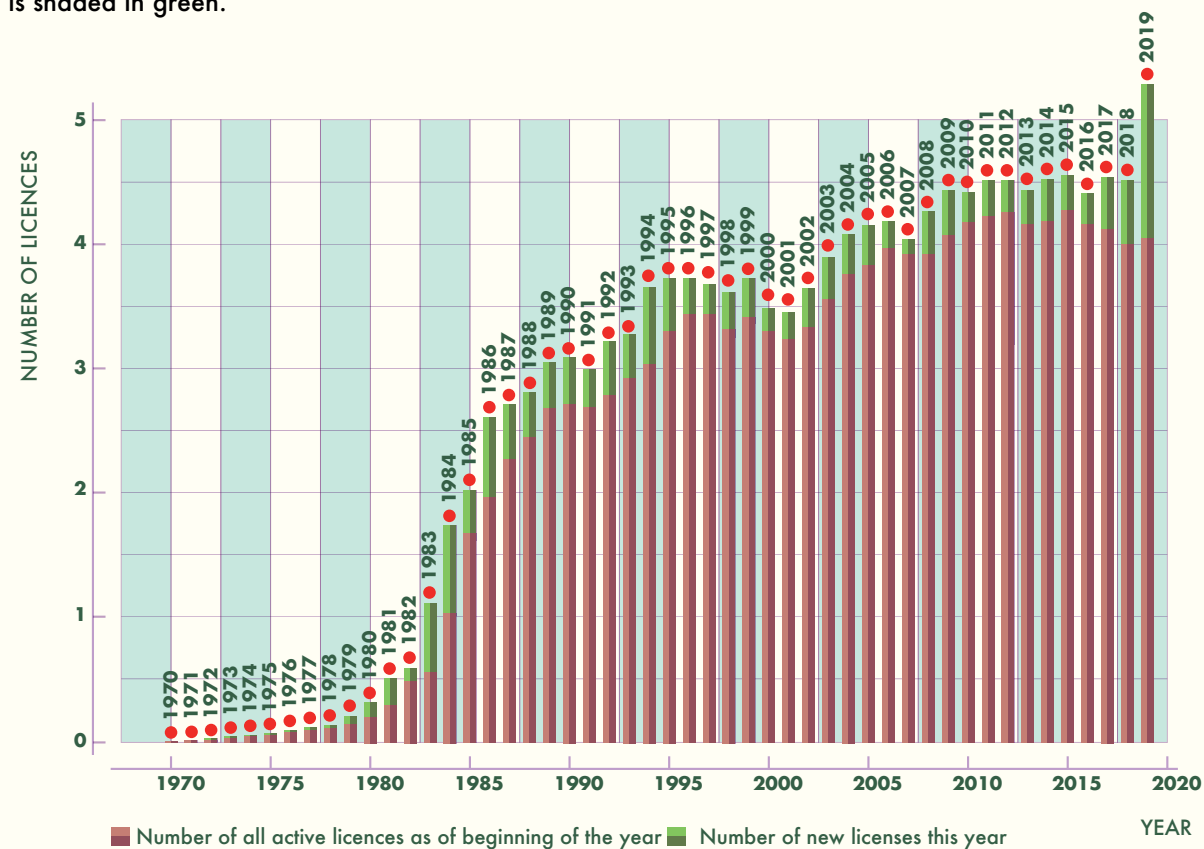
Sub-Sector Development Statistics



This class includes:

- Commercial and consumer photograph production:
- Portrait photography for passports, schools, weddings, etc.
- Photography for commercials, publishers, fashion, real estate or tourism purposes.
- Aerial photography.
- Videotaping of events: weddings, meetings, etc.
- Film processing:
- Developing, printing and enlarging from client-taken negatives or cinefilms.
- Film developing and photo printing laboratories.
- One-hour photo shops (not part of camera stores).
- Mounting of slides.
- Copying and restoring or transparency retouching in connection with photographs.
- Activities of photojournalists.
- Microfilming of documents.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the start of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



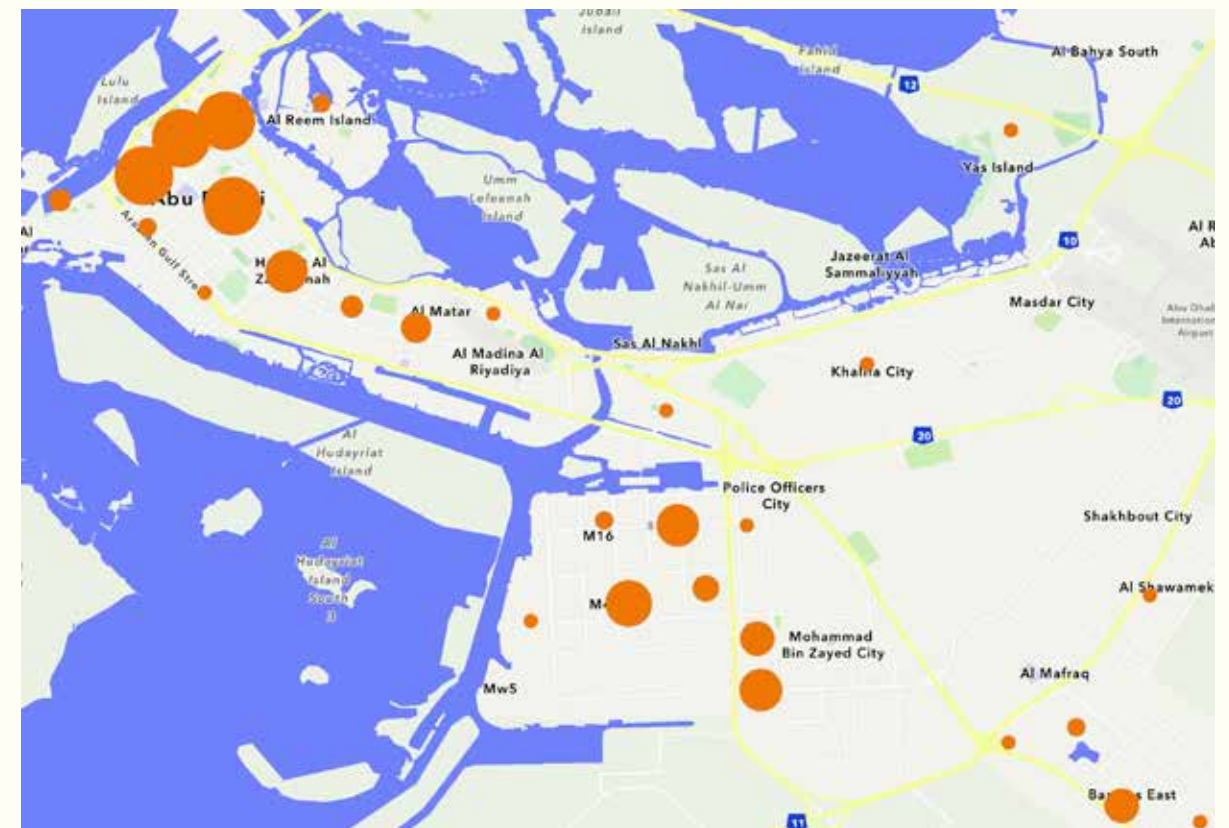
Data Visualisation ISIC Code 7420 - Photographic Activities in Abu Dhabi (1970-2020)

Photographic Activities have been registered in Abu Dhabi since 1970 and are developing stably with an increase of active licences in 2019 (the overall number is 528).

Photographic Activities: Cluster Mapping



The maps below indicate the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 23 Photographic Activities in Abu Dhabi





Map 24 Photographic Activities in Al Ain (left map) and Al Dhafra (right map)

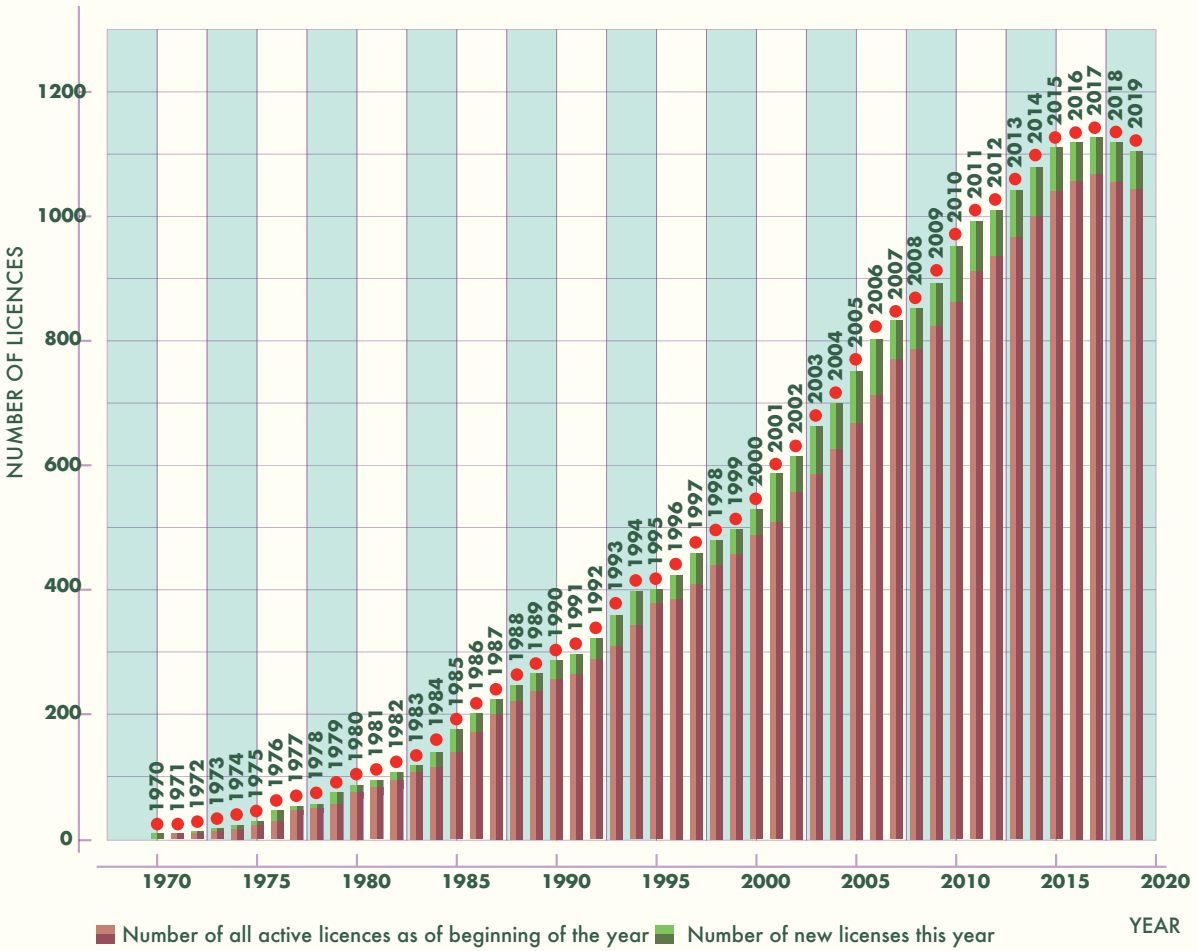
Photographic Activities have a strong clustering tendency and are distributed rather evenly on the emirate’s territory. Many peripheric Photographic Activities assets are located in the proximity of roads and highways. This tendency is observable equally in Abu Dhabi, Al Ain and Al Dhafra.

Photographic Activities: Employment Estimates



According to this study’s estimation, the average number of people employed in the Photographic Activities sub-sector in Abu Dhabi is **3,276** (confidence interval: 2,479 - 4,202).

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 4761 – Retail Sale of Books, Newspapers and Stationery in Specialised Stores in Abu Dhabi (1970-2020)

The Retail Sale of Books, Newspapers and Stationery in Specialised Stores has been registered in Abu Dhabi since 1970. The sub-sector has been developing gradually, with the peak year in 2017. However, since 2017, the number of assets is slightly decreasing. We identified 1,105 active licences in 2019-2020.

The overview of the data shows that many of these licences cover the book and newspapers retail sections in supermarkets (e.g., Lulu, Carrefour, etc.); proportionally, the number of specialised bookstores remains moderate.

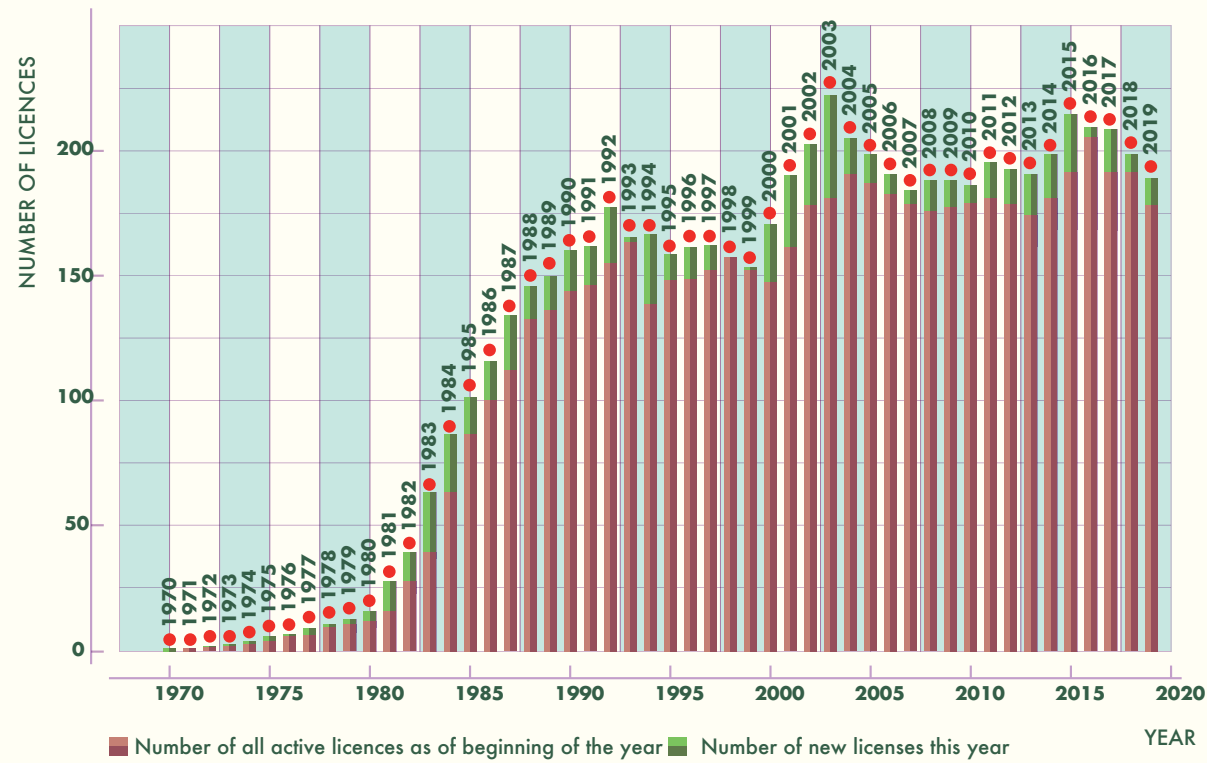
ISIC CODE 4761 - RETAIL SALE OF BOOKS, NEWSPAPERS AND STATIONERY IN SPECIALISED STORES

Sub-Sector Development Statistics



This class includes:

- Retail sale of books of all kinds.
- Retail sale of newspapers and stationery.
- Retail sale of office supplies such as pens, pencils, paper, etc.



Data Visualisation ISIC Code 4762 - Retail Sale of Music and Video Recordings in Specialised Stores in Abu Dhabi (1970-2020)

Similar to the Retail Sale of Books and Newspapers, the Retail Sale of Music and Video Recordings in Specialised Stores has been registered in Abu Dhabi since 1970. The development of the sub-sector has not been linear, with a decrease in the number of licenses in 1999. The sub-sector peak years were 2003

and 2015. After 2015, the overall number of licences has decreased. We identified 190 active licences in 2019-2020. The data overview shows that many of these licences are owned by the supermarkets (e.g., Lulu, Carrefour, etc.); proportionally, the overall number of specialised stores is rather moderate.

Retail Sale of Music and Video Recordings in Specialised Stores: Cluster Mapping

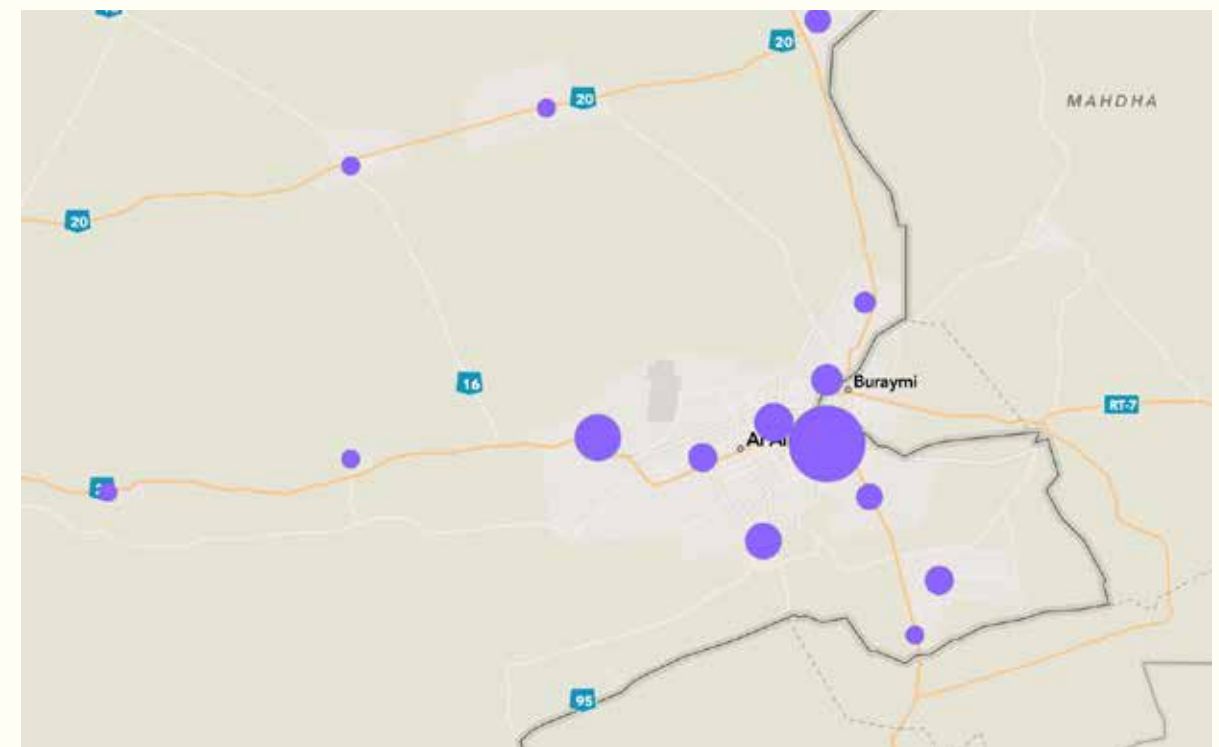
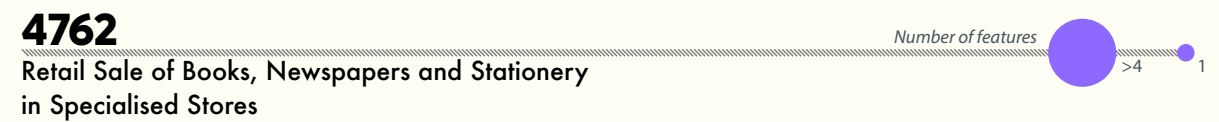


The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

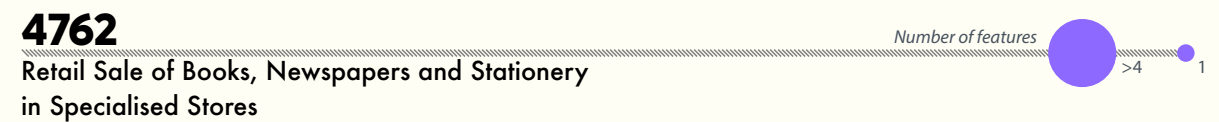
type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 27 Retail Sale of Books, Newspapers and Stationery in Specialised Stores in Abu Dhabi



Map 28 Retail Sale of Music and Video Recordings in Specialised Stores in Al Ain



The Retail Sale of Music and Video Recordings in Specialised Stores sub-sector covers the emirate’s main commercial areas (including not only autonomous specialised stores, but also the retail sections linked to the supermarkets).

Retail Sale of Music and Video Recordings in Specialised Stores: Employment Estimates



According to this study’s estimation, the average number of people employed in the Retail Sale of Music and Video Recordings in Specialised Stores sub-sector in Abu Dhabi is **938** (confidence interval: 542 - 1,529).

ISIC CODE 1811 - PRINTING

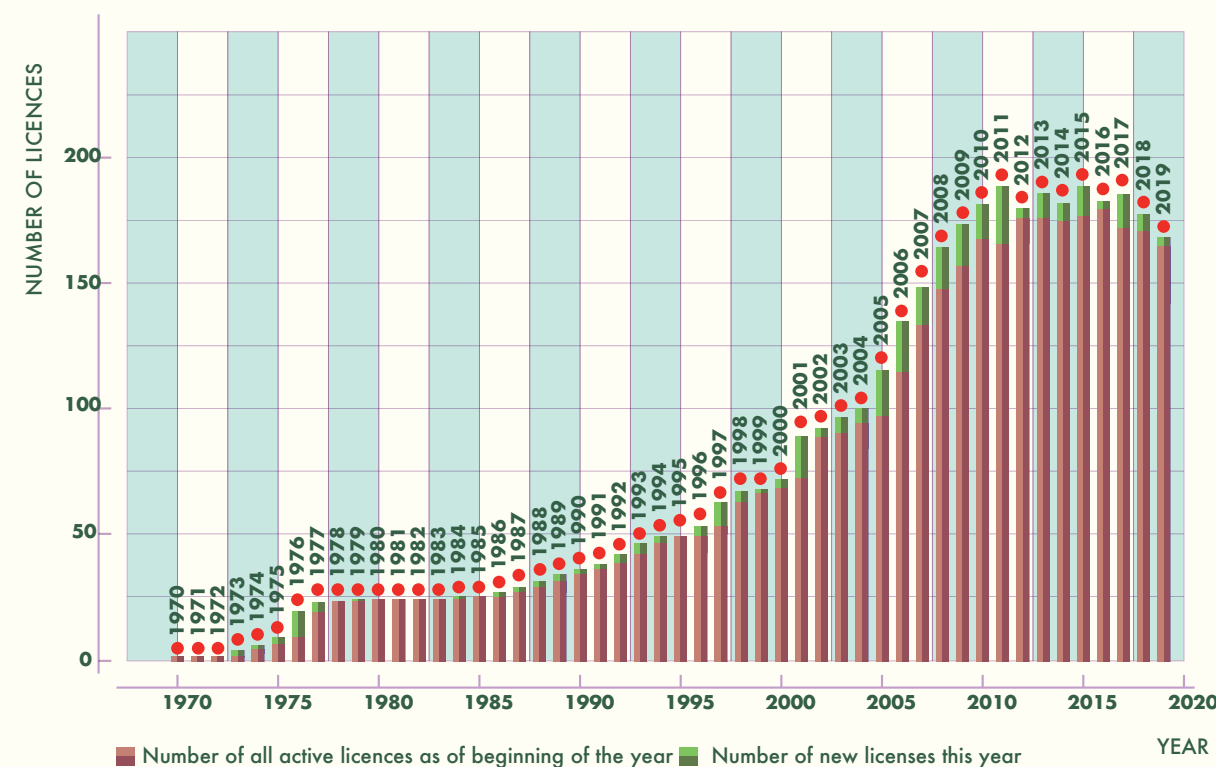
Sub-Sector Development Statistics



This class includes:

- Printing of newspapers, magazines and other periodicals, books and brochures, music and music manuscripts, maps, atlases, posters, advertising catalogues, prospectuses and other printed advertising, postage stamps, taxation stamps, documents of title, cheques and other security papers, diaries, calendars, business forms and other commercial printed matter, personal stationery and other printed matter by letterpress, offset, photogravure, flexographic and other printing presses, duplication machines, computer printers, embossers, etc., including quick printing.
- Printing directly onto textiles, plastic, glass, metal, wood and ceramics (except silk-screen printing on textiles and apparel).
- The material printed is typically copyrighted.
- Printing on labels or tags (lithographic, gravure printing, flexographic printing, other).

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 1811 - Printing in Abu Dhabi (1970-2020)

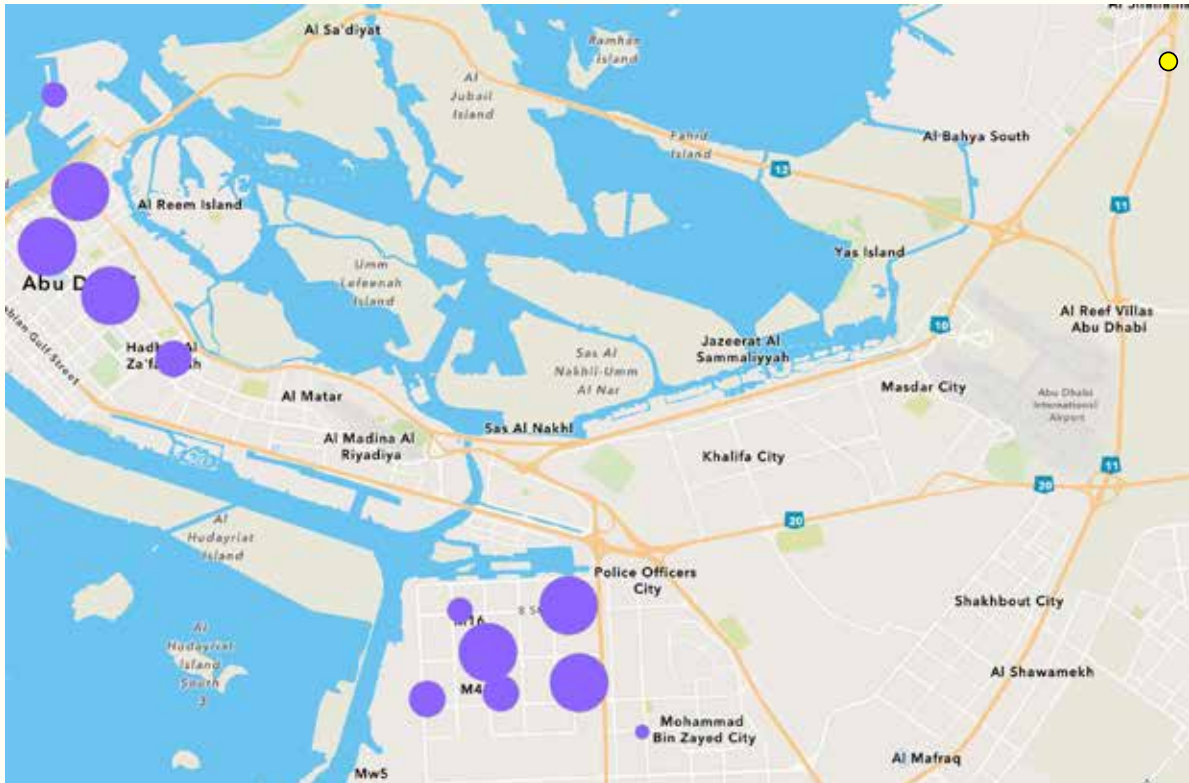
The first Printing assets were registered in Abu Dhabi in 1970. The sub-sector growth has been linear, with a stronger increase in the number of active licences since 2001. However, since the peak year in 2011, a slight immobility of the sub-sector is observable, with a further decrease in licences in 2018 and 2019.

Printing: Cluster Mapping



The maps below indicates the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the

assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 29 Printing Service Activities in Abu Dhabi



Map 30 Printing in Al Ain



The Printing assets are clustered mainly in Abu Dhabi downtown and the Mussafah area. In Al Ain, an important printing cluster is situated in the Al Sahooj-Al Shabhat area, near Zayed Military College.

Employment Estimates



According to this study's estimation, the average number of people employed in the Retail Sale of Music and Video Recordings in Specialised Stores sub-sector in Abu Dhabi is **782** (confidence interval: 422 - 1,320).

ISIC CODE 1812 - SERVICE ACTIVITIES RELATED TO PRINTING

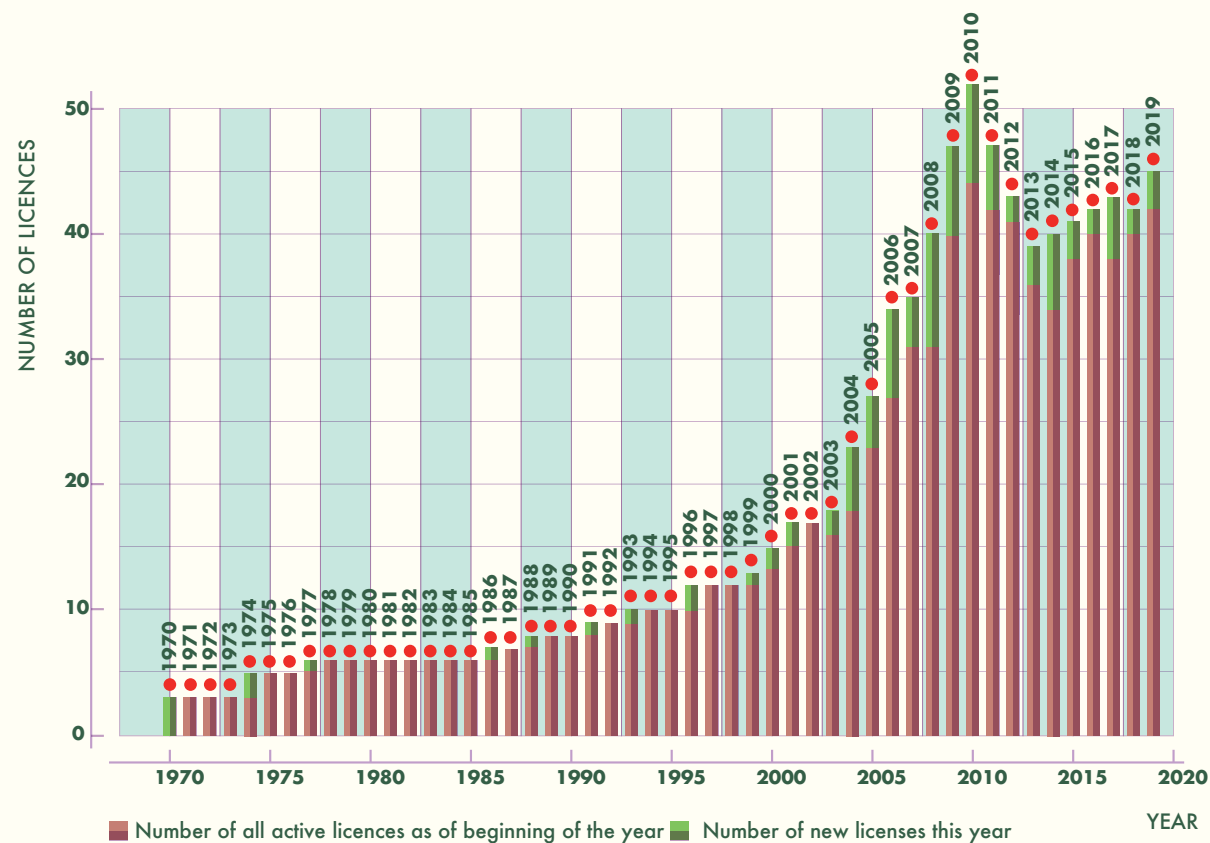
Sub-Sector Development Statistics



This class includes:

- Binding of printed sheets, e.g. into books, brochures, magazines, catalogues, etc. by folding, assembling, stitching, glueing, collating, basting, adhesive binding, trimming, gold stamping.
- Composition, typesetting, phototypesetting, pre-press data input including scanning and optical character recognition, electronic make-up.
- Plate-making services including image setting and plate-setting (for the printing processes letterpress and offset).
- Engraving or etching of cylinders for gravure.
- Plate processes direct to plate (also photopolymer plates).
- Preparation of plates and dies for relief stamping or printing.
- Production of proofs.
- Artistic work including preparation of litho stones and prepared woodblocks.
- Production of reprographic products.
- Design of printing products e.g. sketches, layouts, dummies, etc.
- Other graphic activities such as die-sinking or die-stamping, Braille copying, punching and drilling, embossing, varnishing and laminating, collating and in setting, creasing.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 1812 - Service Activities Related to Printing in Abu Dhabi (1970-2020)

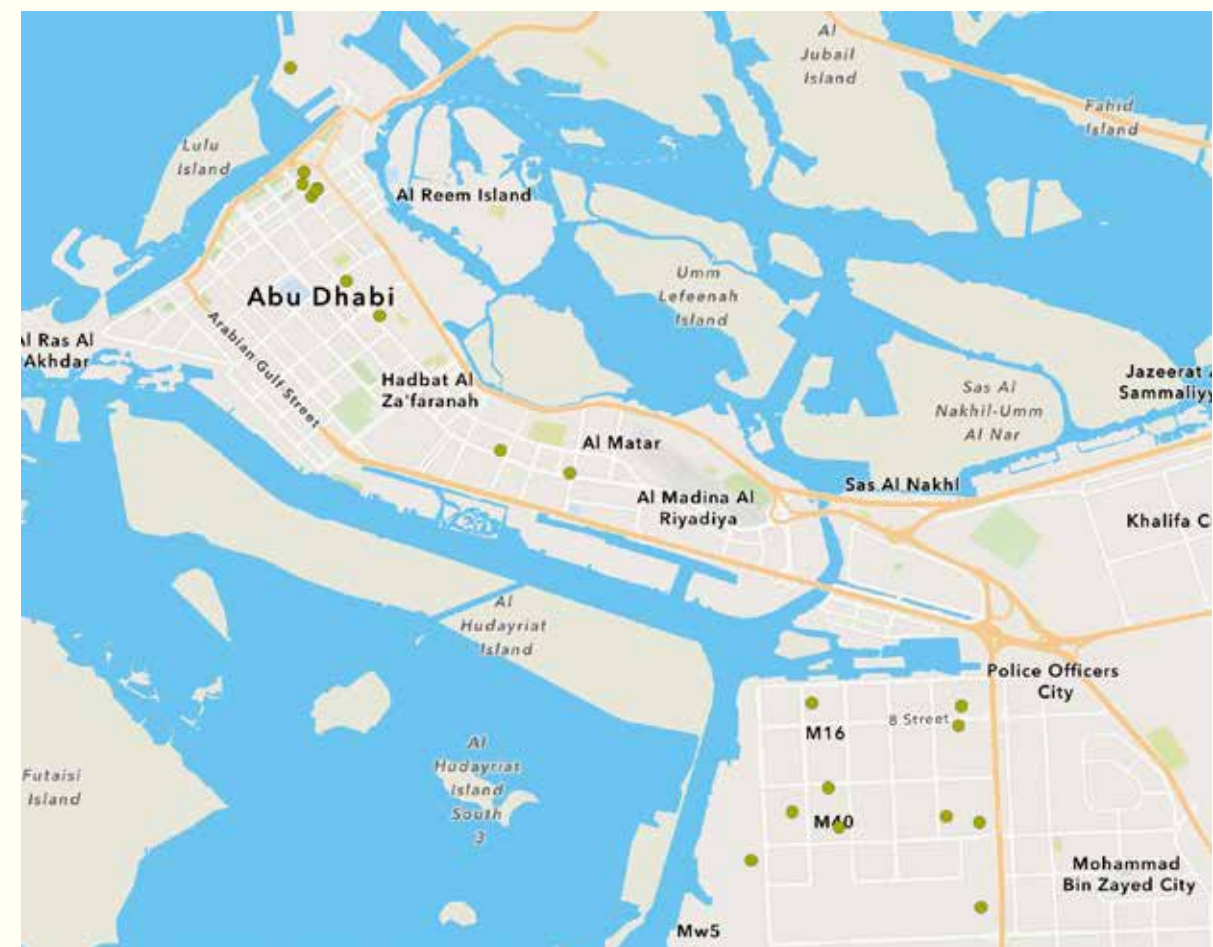
Service Activities Related to Printing have been registered in Abu Dhabi since 1970. Since 2003, the sub-sector has grown, with the peak year in 2010. Since then, the number of active licences is decreasing (45 in 2020). However, the overall pattern of the sub-sector development does not qualify it as stagnating.

Service Activities Related to Printing: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics

(spatial proximity of the assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 31 Service Activities Related to Printing in Abu Dhabi

1812

Service Activities Related to Printing



Map 32 Service Activities Related to Printing in Al Ain

Service Activities Related to Printing are clustered in the same areas as the Printing activities (Abu Dhabi downtown, the Mussafah area and the Al Sahooj-Al Shabhat area near Zayed Military College in Al Ain). The spatial proximity between these two sub-sectors is also proven by the Heatmap analysis (p. 79).

Service Activities Related to Printing: Employment Estimates



According to this study's estimation, the average number of people employed in the Service Activities Related to Printing sub-sector in Abu Dhabi is **225** (confidence interval: 94 - 538).

ISIC CODE 3211 - MANUFACTURE OF JEWELLERY AND RELATED ARTICLES

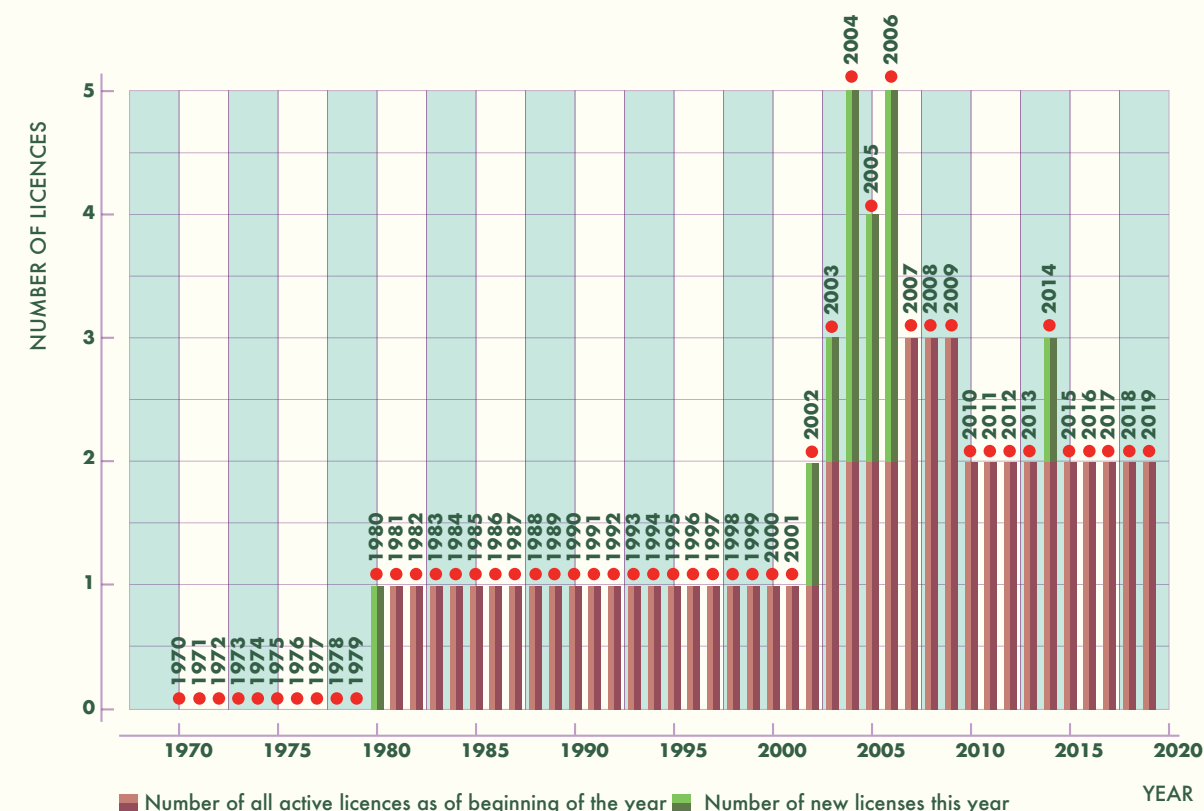
Sub-Sector Development Statistics



This class includes:

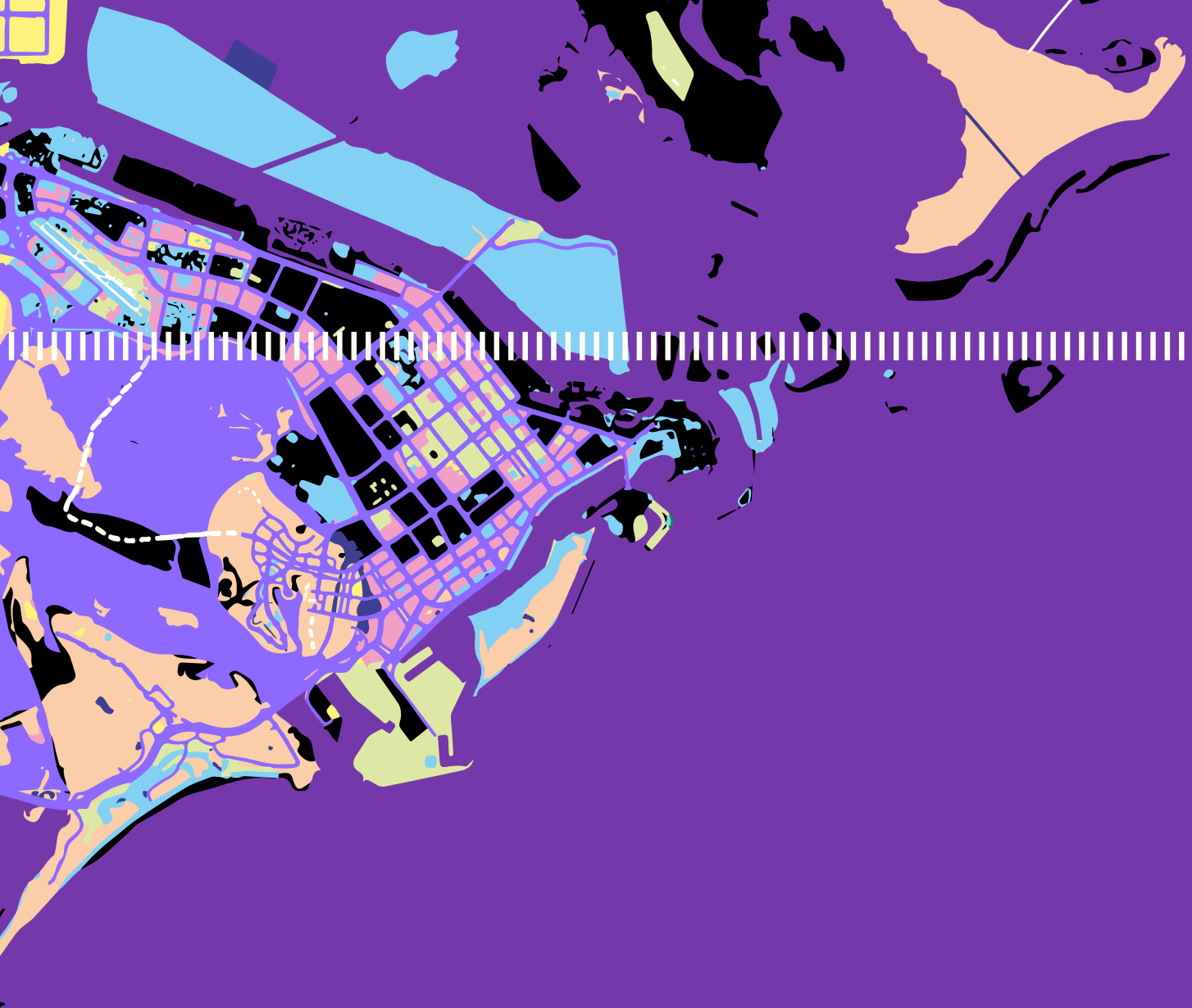
- Production of worked pearls.
- Production of precious and semi-precious stones in the worked state, including the working of industrial quality stones and synthetic or reconstructed precious or semi-precious stones.
- Working of diamonds.
- Manufacture of jewellery of precious metal or of base metals clad with precious metals, or precious or semi-precious stones, or of combinations of precious metal and precious or semi-precious stones or of other materials.
- Manufacture of goldsmiths' articles of precious metals or of base metals clad with precious metals:
- Dinnerware, flatware, hollowware, toilet articles, office or desk articles, articles for religious use, etc.
- Manufacture of technical or laboratory articles of precious metal (except instruments and parts thereof): crucibles, spatulas, electroplating anodes, etc.
- Manufacture of precious metal watchbands, wristbands, watch straps and cigarette cases.
- Manufacture of coins, including coins for use as legal tender, whether or not of precious metal.
- Engraving of personal precious and non-precious metal products.

The chart below displays the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 3211 - Manufacture of Jewellery and Related Articles in Abu Dhabi (1980-2020)

The Manufacture of Jewellery and Related Articles assets has been registered in Abu Dhabi since 1980. The lack of data on the location of assets of this type prevented a cartographic analysis and an employment estimation. The data overview shows that some of the assets of this type are merged with the Specialised Design Activities sub- sector, calling for a qualitative study. The current analysis does not include unlicensed Abu Dhabi artisans, primarily focusing on licensed handmade manufacturing. An ethnographic analysis would allow proper categorization and supplementary data collection on traditional crafts. This exploration will be covered in the Abu Dhabi Cultural Practices module of CultureSTATS-AD..



Stagnating Abu Dhabi Cultural Assets

ISIC CODE 5813 - PUBLISHING OF NEWSPAPERS, JOURNALS AND PERIODICALS

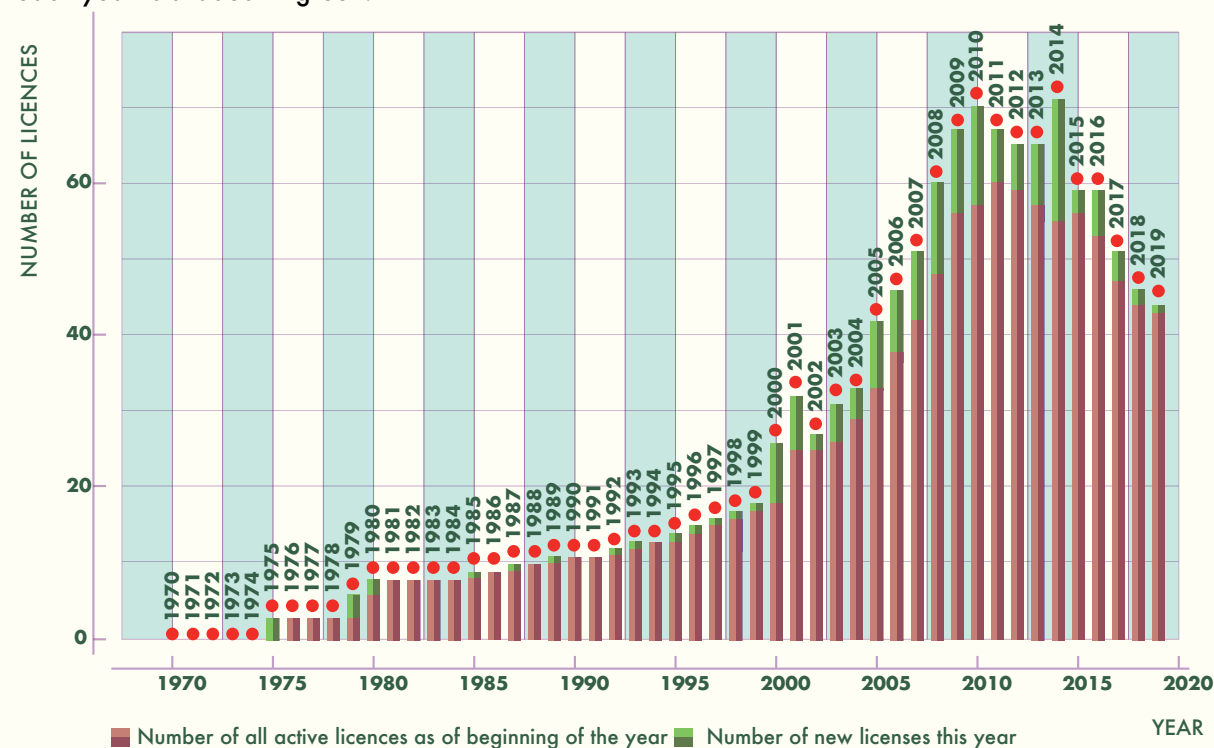
Sub-Sector Development Statistics



This class includes:

- Publishing of newspapers, including advertising newspapers.
- Publishing of periodicals and other journals, including publishing of radio and television schedules.
- Publishing can be done in print or electronic form, including on the Internet.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation ISIC Code 5813 - Publishing of Newspapers, Journals and Periodicals in Abu Dhabi (1975-2020)

The Publishing of Newspapers, Journals and Periodicals assets have been registered in Abu Dhabi since 1975. The growth of the sub-sector has increased since 2000. While its growth has never been linear, this dynamic has been further interrupted after the last peak year in 2014.

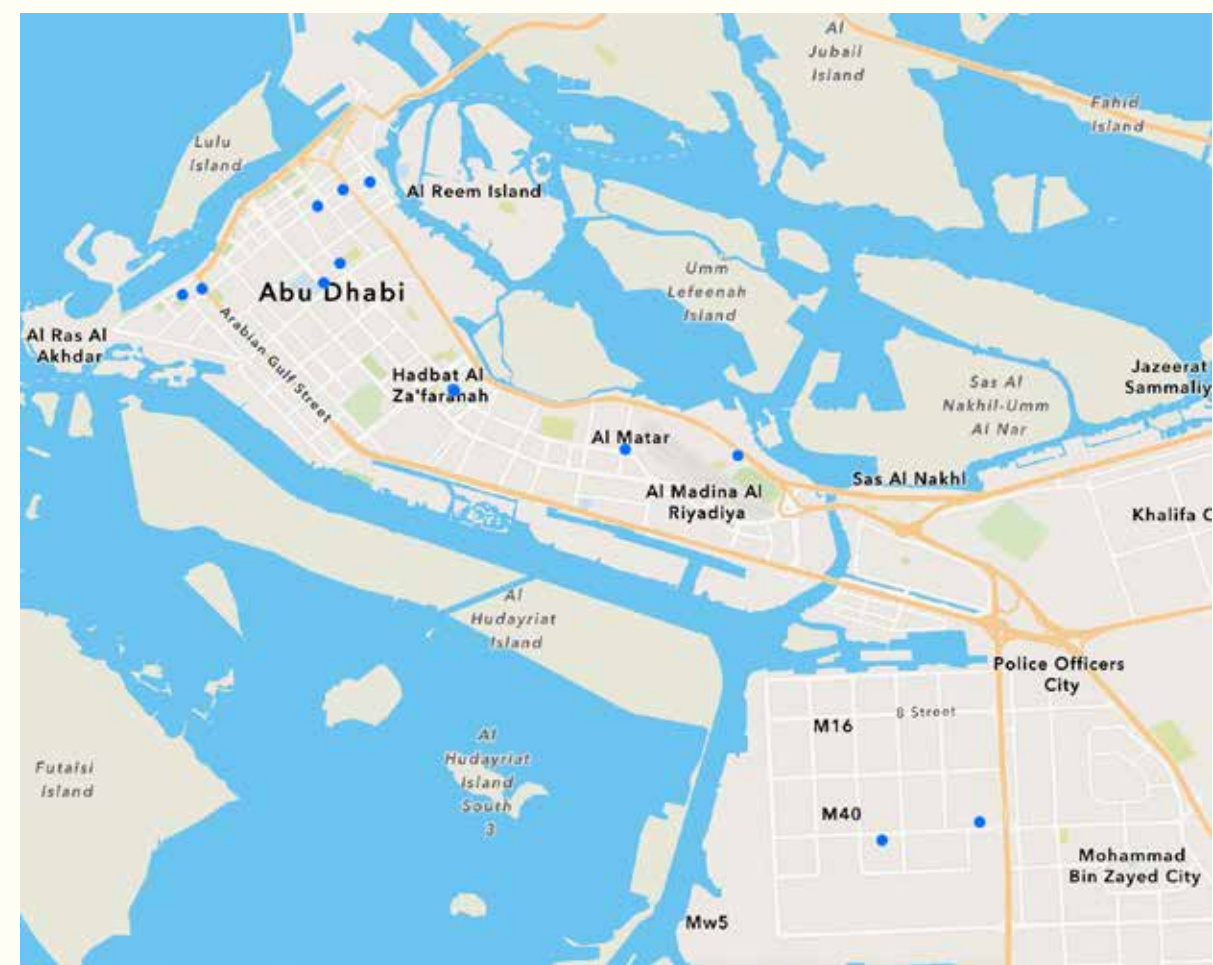
In the period between 2015 and 2019, there has been a clear decrease in the number of active licences (45 in 2019-2020). The resultant conclusion is that this sub-sector is currently stagnating.

Publishing of Newspapers, Journals and Periodicals: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics

(spatial proximity of the assets of the same type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 33 Publishing of Newspapers, Journals and Periodicals in Abu Dhabi

5813 Publishing of Newspapers, Journals and Periodicals

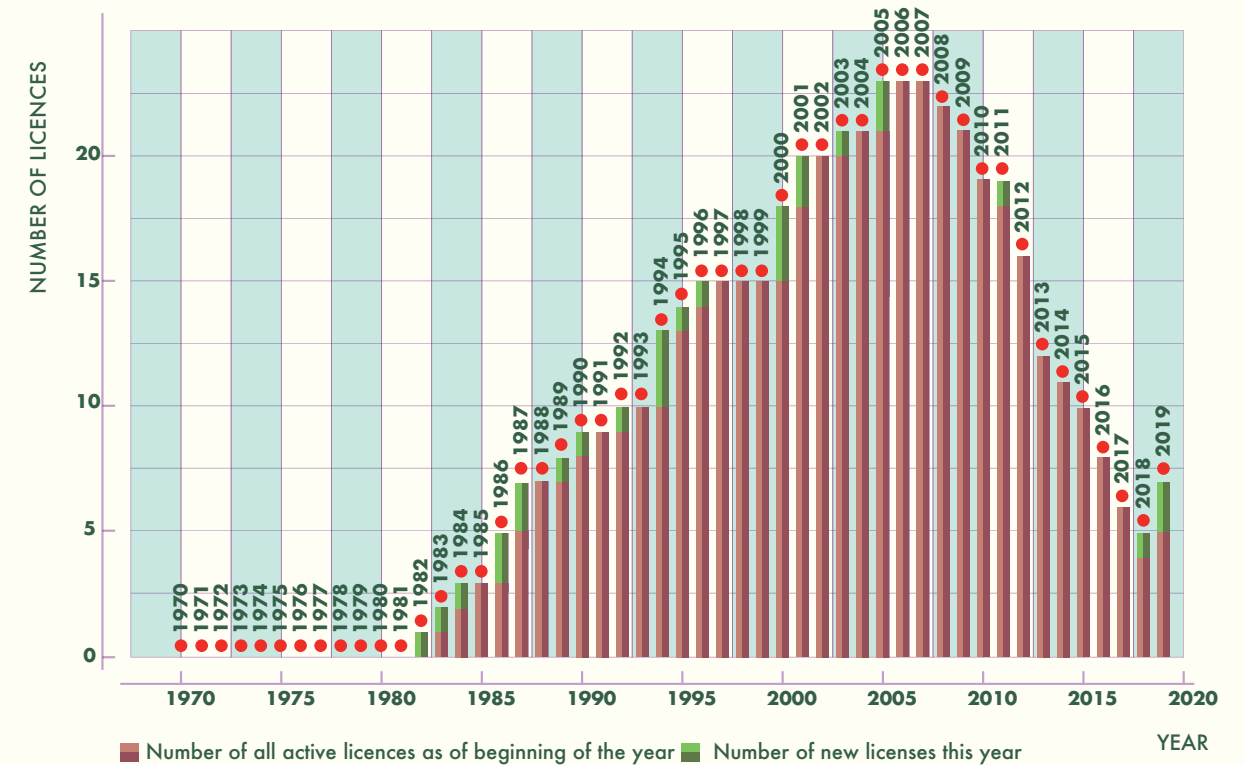
ISIC CODE 7722 - RENTING OF VIDEO TAPES AND DISKS

Sub-Sector Development Statistics



This class includes renting of videotapes, records, CDs, DVDs, etc.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 7722 - Renting of Video Tapes and Disks in Abu Dhabi (1982-2020)

The Renting of Video Tapes and Disks has been registered in Abu Dhabi since 1982. The sub-sector growth increased until 2005 and stayed stable until 2007. Since 2008, the number of active licences has decreased. Despite the two new assets registered in 2019 (the overall number of active licences increased consequently to seven), the overall sub-sector dynamic is stagnating.

The lack of data on the location of assets of this type prevented a cartographic analysis.



Map 34 Publishing of Newspapers, Journals and Periodicals in Al Ain

5813

Publishing of Newspapers, Journals and Periodicals

The Publishing of Newspapers, Journals and Periodicals assets have a weak tendency for clustering. However, the presented mapping is not exhaustive; supplementary qualitative and quantitative data collection on the sub-sector is recommended.

Publishing of Newspapers, Journals and Periodicals: Employment Estimates



According to this study's estimation, the average number of people employed in the Publishing of Newspapers, Journals and Periodicals sub-sector in Abu Dhabi is **141** (confidence interval: 51 - 383).

Renting of Video Tapes and Disks: Employment Estimates



According to this study's estimation, the average number of people employed in the Renting of Video Tapes and Disks sub-sector in Abu Dhabi is 27 (confidence interval: 6 - 190).

ISIC CODE 5920 - SOUND RECORDING AND MUSIC PUBLISHING ACTIVITIES

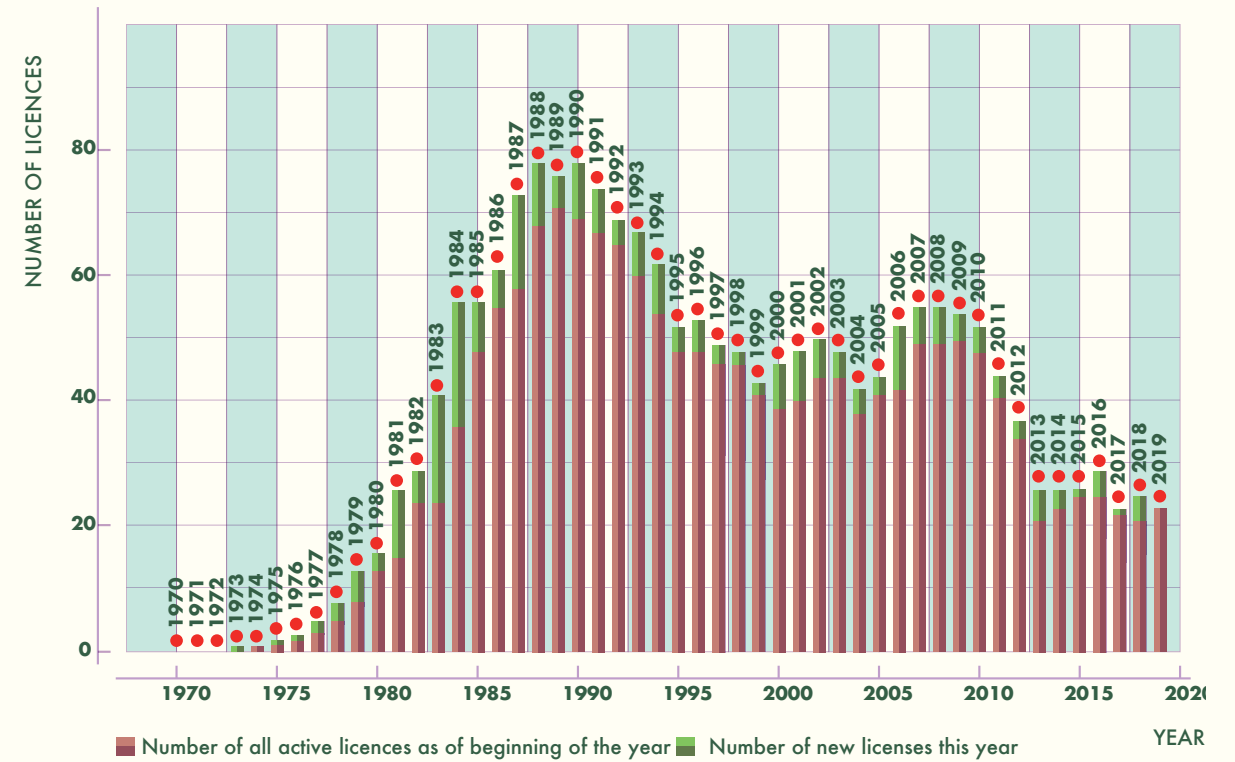
Sub-Sector Development Statistics



This class includes:

- Production of original (sound) master recordings, such as tapes, CDs.
- Sound recording service activities in a studio or elsewhere, including the production of taped radio programming, audio for film, television, etc.
- Music publishing, e.g., activities of:
 - Acquiring and registering copyrights for musical compositions.
 - Promoting, authorising and using these compositions in recordings, radio, television, motion pictures, live performances, print and other media.
 - Distributing sound recordings to wholesalers, retailers or directly to the public.
 - Units engaged in these activities may own the copyright or act as administrator of the music copyrights on behalf of the copyright owners.
 - Publishing of music and sheet books.

The chart below shows the dynamics of the development of this class of cultural assets over the years, since the foundation of the United Arab Emirates. The number of active licences as of the beginning of each year is shaded in brown. The number of new licences obtained by the relevant assets during each year is shaded in green.



Data Visualisation - ISIC Code 5920 - Sound Recording and Music Publishing Activities in Abu Dhabi (1973-2020)

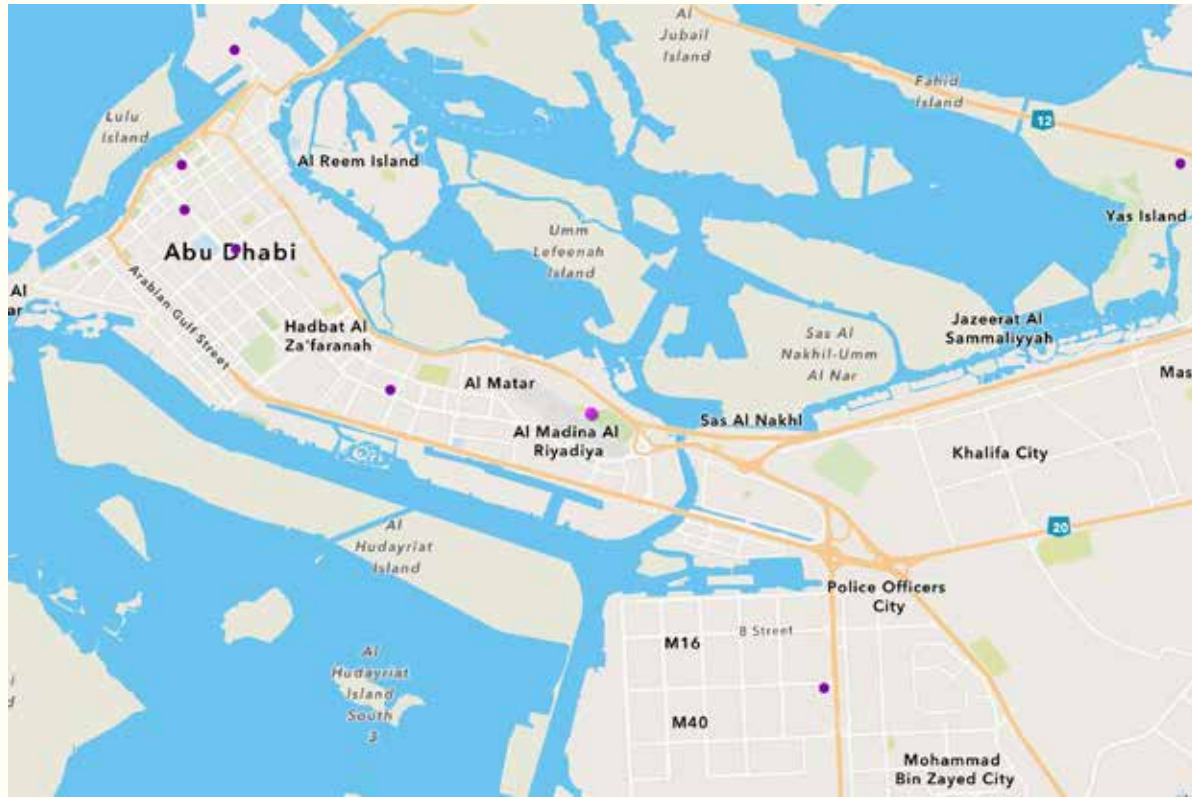
Sound Recording and Music Publishing Activities have been registered in Abu Dhabi since 1973. After the peak years in 1988 and 1990, and the slight increase in the number of active licences between 2007 and 2009, the sub-sector has gradually declined (23 currently active licences, compared to 78 in 1990 and 55 in 2008).

Sound Recording and Music Publishing Activities: Cluster Mapping



The maps below show the geospatial location of the relevant cultural assets in the emirate of Abu Dhabi. The data mapping is limited by the available data records with valid geographical coordinates. The size of the coloured circles is proportional to the existing clustering dynamics (spatial proximity of the assets of the same

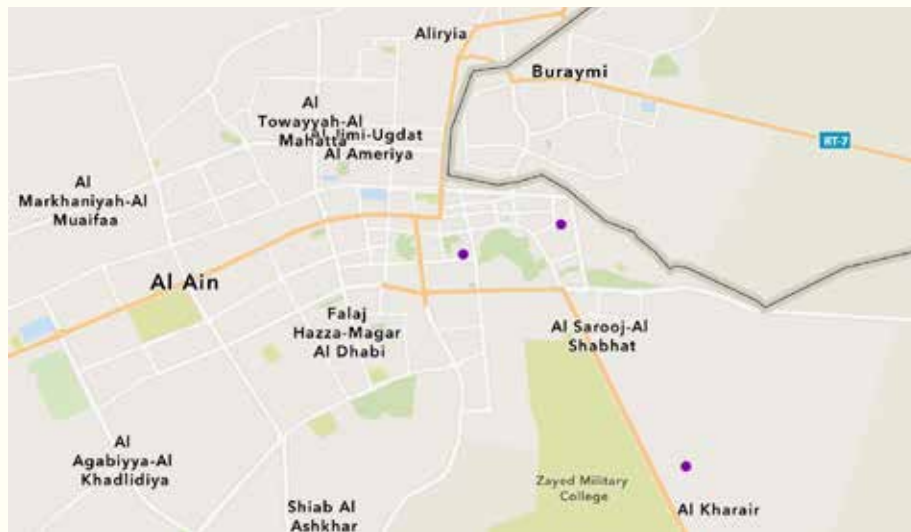
type that tend to be installed in the same neighbourhood, city area, suburb, etc.). The legend of each map shows the scale of clustering (maximum number of features [entities] in a cluster).



Map 35 Sound Recording and Music Publishing in Abu Dhabi

5920

Sound Recording and Music Publishing

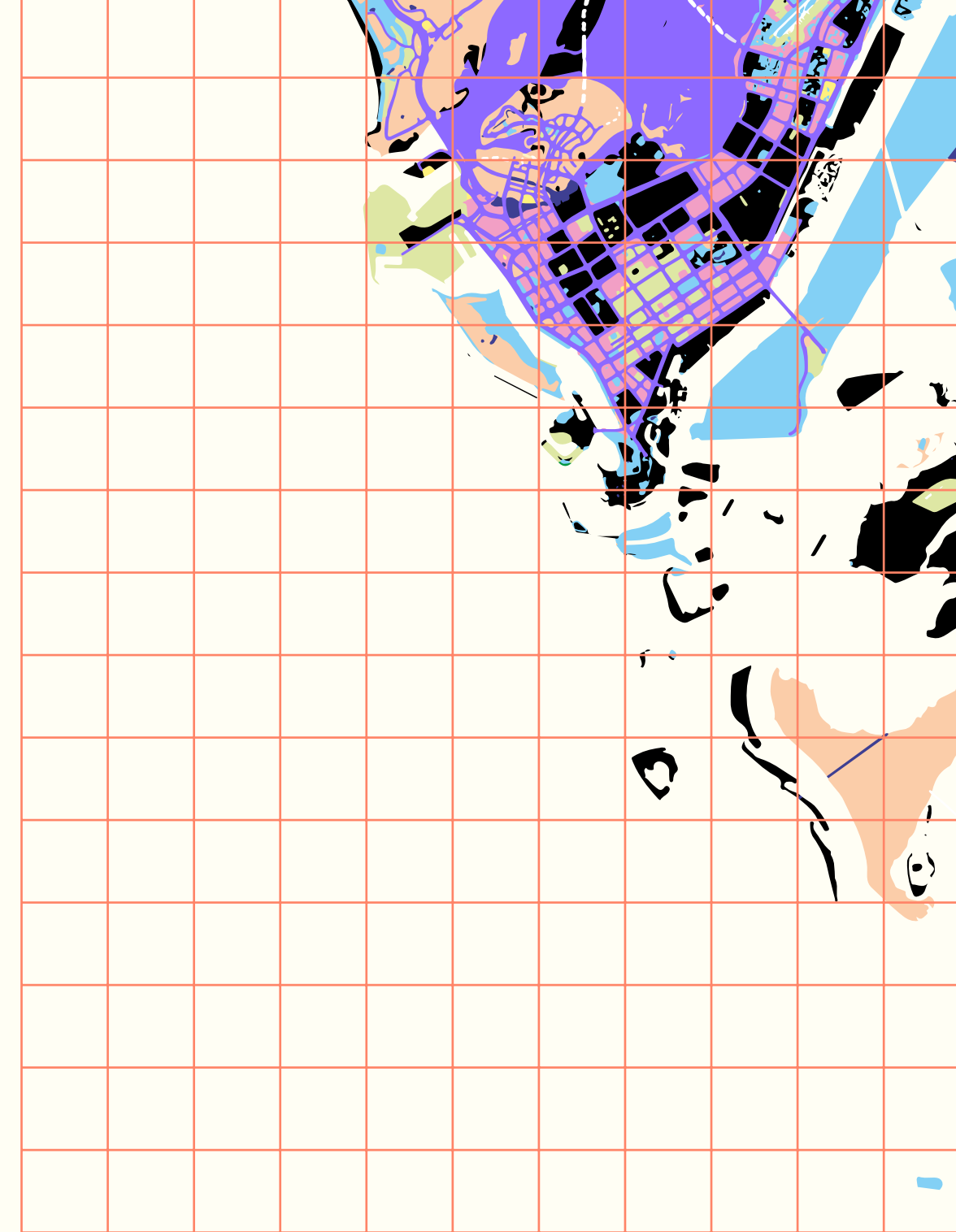


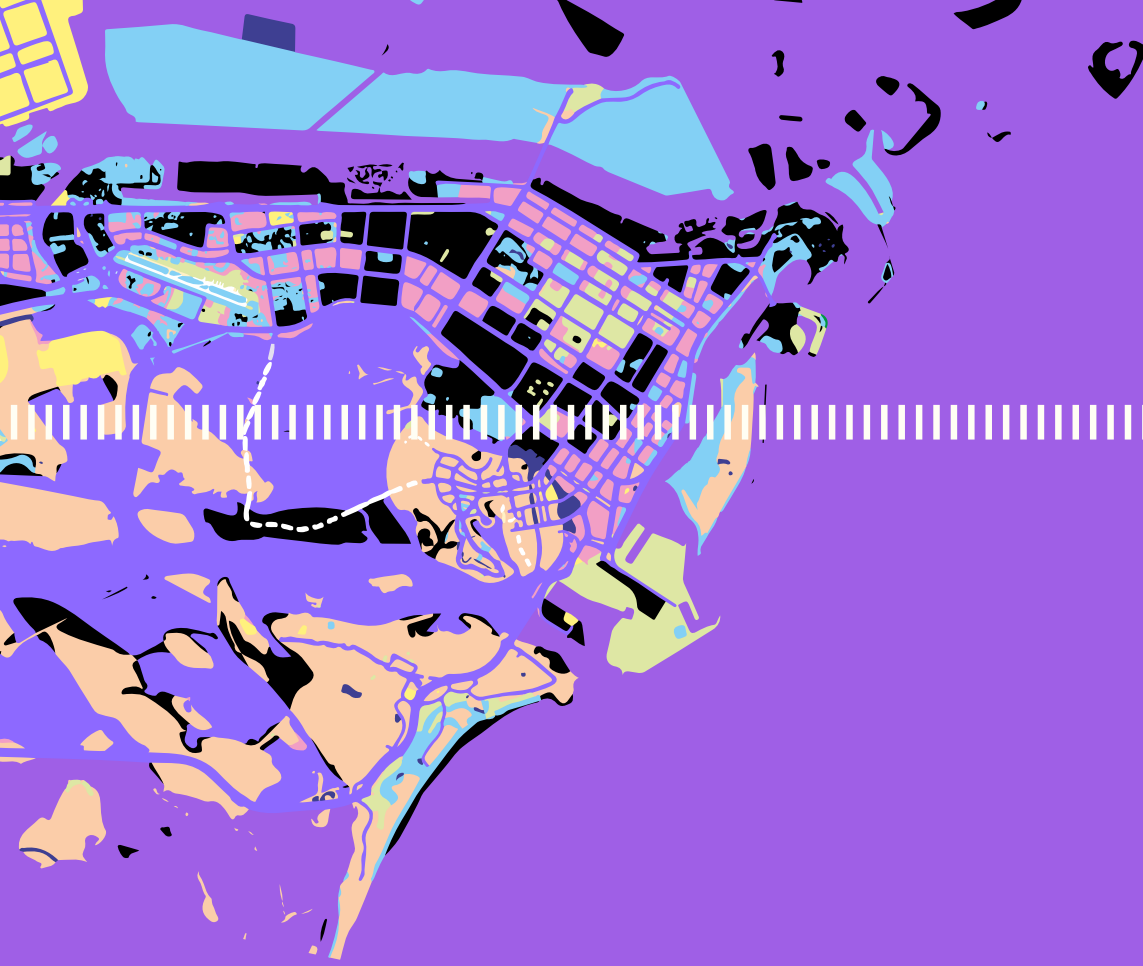
Map 36 Sound Recording and Music Publishing in Al Ain

Sound Recording and Music Publishing: Employment Estimates

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According to this study's estimation, the average number of people employed in the Sound Recording and Music Publishing Activities sub-sector in Abu Dhabi is 134 (confidence interval: 50 - 371).





NEXT STEPS

NEXT STEPS

The international competitiveness in the field of culture sector development has induced a strong demand for the harmonisation of cultural statistics in the various countries. The latter is focused predominantly on a harmonisation of outputs already practiced by national accountants: the statistical variables are defined in common, then each country measures them according to its own means. To measure the impacts of cultural policies both locally and in the context of international competitiveness, the culture indicators should be both comparable internationally and anchored in the local context. From this point of view, “the various harmonisation levels are compared with the various forms of connection and convertibility between the national currencies”.

Consequently, the baseline culture indicators (such as cultural participation, public expenditure of culture, etc.) that seem at first glance to be comparable internationally have different causal and support factors in different local contexts. Cartwright and Hardie define support factors as causal factors specified by the causal principle that are not the focus of the intervention (but are jointly necessary with the focused causal factor). So, whether the term ‘causal factor’ or ‘support factor’ is chosen depends only on the focus of intervention. In the field of cultural statistics, both causal factors and support factors are embodied by the heterogeneous statistical indicators (already existing or that still need to be developed). To understand what assessments are relevant to the cultural landscape of Abu Dhabi, it is thus necessary to proceed to both ‘horizontal’ and ‘vertical’ searches.

Horizontal search is focused on identifying the full set of necessary support factors (e.g. are the social variables that explain cultural participation in Abu Dhabi the same as in other countries? If not, how can they be identified?). Because support factors are not the target of an intervention, they are easy to dismiss. But if they are missing, the indicator will not function properly. For instance, the definition of ‘household’ in Abu Dhabi will impact the statistical indicators related to ‘household expenditure of culture’. It will also impact the harmonisation of these indicators on the international level.

From the perspective of ‘horizontal search’, CultureSTATS-AD needs to consider and adapt the international statistical frameworks that assess both the causal factors that operate the culture sector per se (e.g. cultural participation) and the supporting factors across different policy areas partly correlated with culture (e.g. social inclusion). In a vertical search, one considers whether one has described the cause at the right level of description. There is a tension between making culture statistics concrete enough to be useful and abstract enough to be comparable internationally.

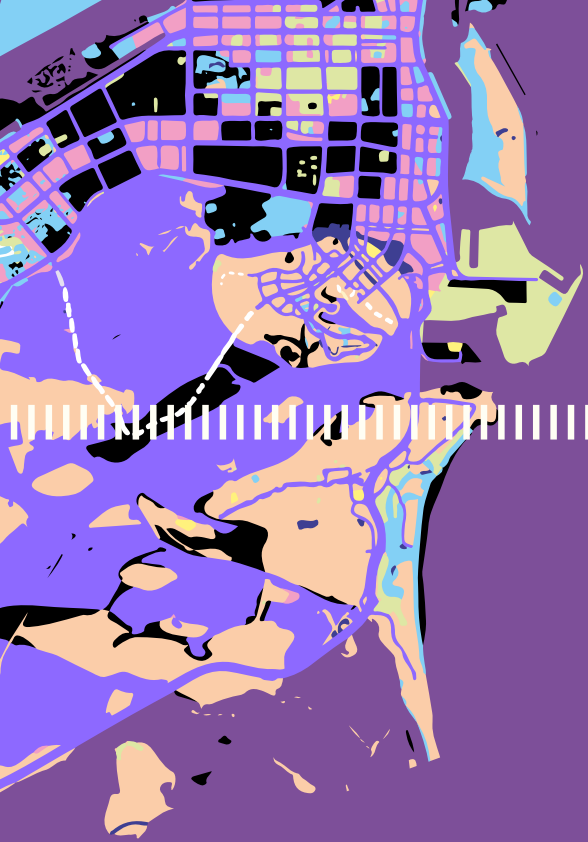
Among the existing culture statistic classifications, the ESSnet-Culture framework is the most extensively documented: it captures all core domains and functions of a culture sector and proposes a systemised set of definitions and a methodology. However, as a generic European approach, the ESSnet-Culture framework offers a non-specific understanding of how to build composite cultural indicators at the scale of each country. In this sense, the available national documents that explain the approaches of the entities comparable to DCT Abu Dhabi in terms of the scope of the action (e.g. documentation of the French Ministry of Culture) present a more relevant source of knowledge for indicator building.

In 2020, DCT Abu Dhabi identified the theme blocks of culture indicators that exist in the international practice and established the logic links between these indicators and the existing indicators in Abu Dhabi. Also, the available documentation from the international peers of DCT Abu Dhabi allows for a comparison of how the analogous indicators are calculated in different national contexts and how they are then aggregated on the international level (e.g. international statistical frameworks, international indexes, such as Creative Cities Index, etc.).

As a next step, the focus needs to be on identifying the causal and supporting factors appropriate to Abu Dhabi that allow the relevant composite indicators to be built that reflect a specific cultural reality. For this, the data that has been collected from the external stakeholders in 2020 will need to be compiled and the DCT Abu Dhabi strategy components will need to be operationalised through these data elements. For this, it is necessary to (1) define causal and supporting factors and (2) understand their relative ‘weights’ (e.g. how to operationalise ‘social impact’ of culture? What is the relative ‘weight’ of cultural indicators, socio-demographic indicators, urban indicators, etc. that need to be combined to assess the ‘social impact’?). This is a complex task that will require several expert meetings and in-depth discussions among DCT Abu Dhabi experts, academic experts, experts from the relevant Abu Dhabi public administration entities (e.g. Department of Community Development (DCD), Department of Economic Development (DED), Statistics Centre Abu Dhabi (SCAD), etc.).

As the final step, the percentage of coverage of each indicator with the existing data will need to be defined, as well as what data is still missing (e.g. if some employment-related data elements need to comprise part of the scope of the indicator ‘social impact of culture’, what cultural employment data is still missing must be understood to make the indicator operational and capable to cover the whole scope of Abu Dhabi).

In terms of the ‘vertical search’ for the right level of description of the cultural phenomena, three main elements will be considered: (1) establishment of the relationship between the general and the particular among the culture definitions and concepts that comprise part of each composite indicator, (2) identifying of correlation and overlapping between indicators and their elements, and correction of such cases, and (3) defining and categorisation of still uncategorised elements through the glossaries tool.



CultureSTATS-AD



CultureSTATS-AD is a knowledge platform that produces cultural statistics on the emirate of Abu Dhabi. It combines existing data with new research, statistics and analysis to create a bigger picture of how culture drives the emirate forward.

CultureSTATS-AD provides tools and information to build on the current understanding of the impact of culture and cultural assets on Abu Dhabi's social and economic growth. It adopts an interdisciplinary approach that requires research expertise and ongoing collaborations with social scientists, economists, urban planners, data scientists and geographers. This research enables an in-depth exploration of the Abu Dhabi culture sector and the emirate's heterogeneous cultural fabric.

The research is aided by GIS mapping, and the results are documented in CultureSTATS-AD platforms for data collection, storing and interpretation, benefiting stakeholders and policymakers. Guidelines and recommendations for regular data collection will be issued as a detailed guide on Abu Dhabi's cultural statistics.

The CultureSTATS-AD project is a large-scale and complex project with a high degree of inter-task dependency. Each project module requires a series of activities performed sequentially and in parallel with others. These include GIS mapping, setting and defining metadata and statistics, a cultural organisations and professionals register, and a population survey.

GIS MAPPING

The ESRI ArcGIS server has been used to map the Abu Dhabi cultural assets and create the first map of the emirate of Abu Dhabi cultural landscape. As of December 2020, the GIS mapping platform allows the following types of analysis:

- Visualise the historical development of the Abu Dhabi cultural assets from 1970 to 2020.
- Show the localisation of the assets that comprise part of different cultural activities, as per ISIC international classification.
- Visualise how the different cultural assets are clustered in the emirate landscape and assess the 'cultural saturation' on a neighbourhood, city and emirate level.
- Assess the spatial correlations of the resident population's cultural resources and socio-economic characteristics, such as age and nationality.
- Identify the territories that might need targeted cultural development strategies.

METADATA, DEFINITIONS AND STATISTICAL TERMS

The CultureSTATS-AD terms documentation is composed of the Glossary of Culture Definitions (e.g. what is 'Museum'?). The initial glossary approach has been based on the culture definitions derived from the approved public policies and the existing DCT Abu Dhabi statistical indicators related to the culture. For the common statistical concepts, cooperation with Eurostat has been engaged.

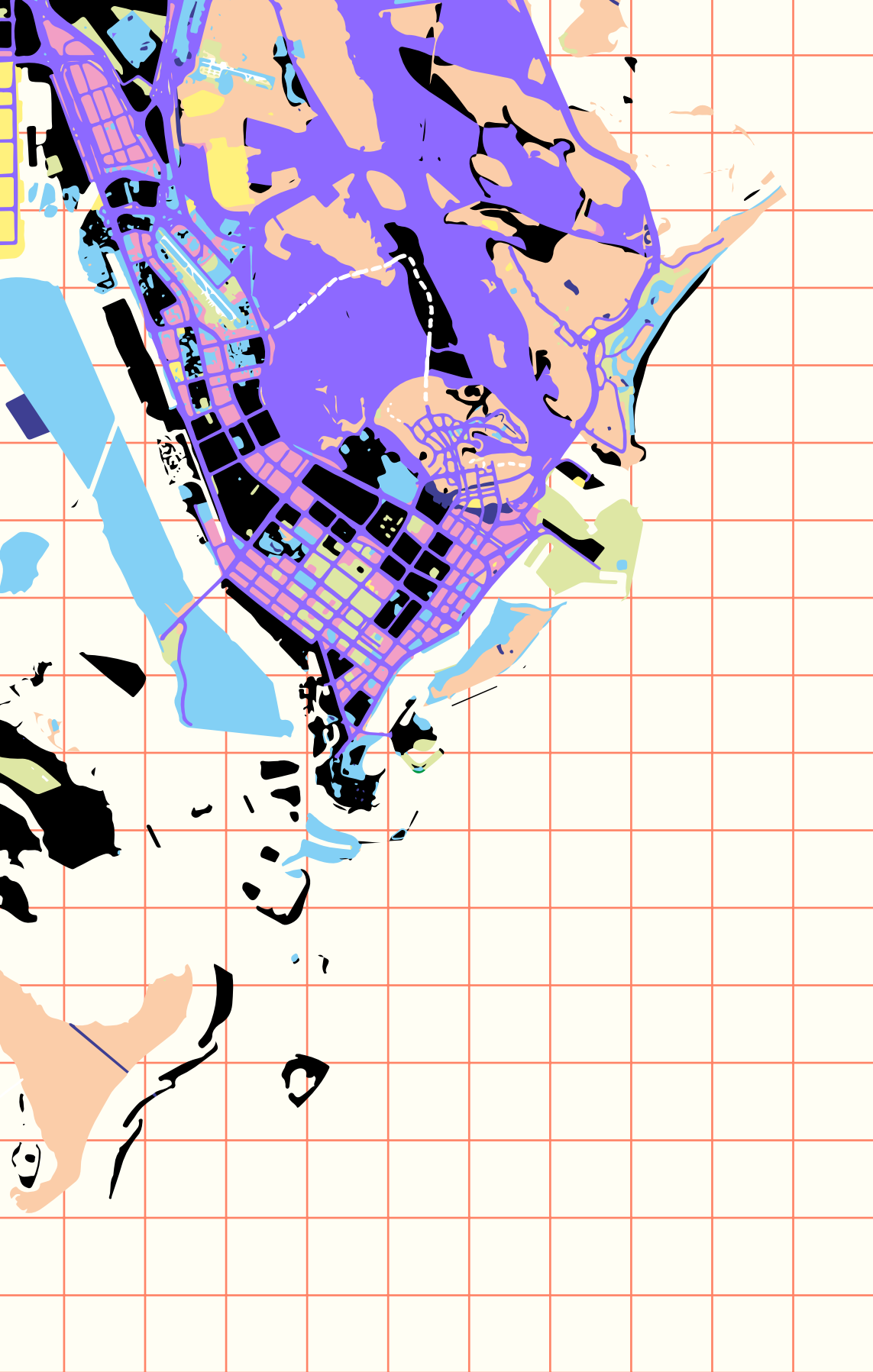
The critical culture definitions extracted from Abu Dhabi and DCT Abu Dhabi-approved policies and regulations (e.g. Law No. 4 of 2016 Concerning the Cultural Heritage of the Emirate of Abu Dhabi and By-Law 2019, Historic Environment Policies, Intangible Heritage Policies and others) were integrated into the CultureSTATS-AD glossaries. The glossaries will also explain commonly used and internationally recognised statistical terms such as 'administrative data', 'exploratory metadata' to unify the understanding of these terms across the cultural stakeholders in Abu Dhabi. Through a collaboration with Eurostat, the Concepts and Definitions Database will be made available in Arabic and English, covering general statistical terminology, metadata and population and social conditions.

DCT ABU DHABI REGISTER OF CULTURE ORGANISATIONS AND PROFESSIONALS (ROCOP)

The Register of Cultural Organisations and Professionals (ROCOP) was launched on 17 November 2020 on Abu Dhabi Culture website. ROCOP data will be used to build long-term interaction with the cultural and creative sector of Abu Dhabi through communication, dissemination, updates and invitations to capacity-building activities such as workshops, seminars and conferences. ROCOP is also a permanent data collection tool that will continuously compliment the culture statistical system by covering the key indicators such as culture employment, culture business demographics and culture freelance sector.

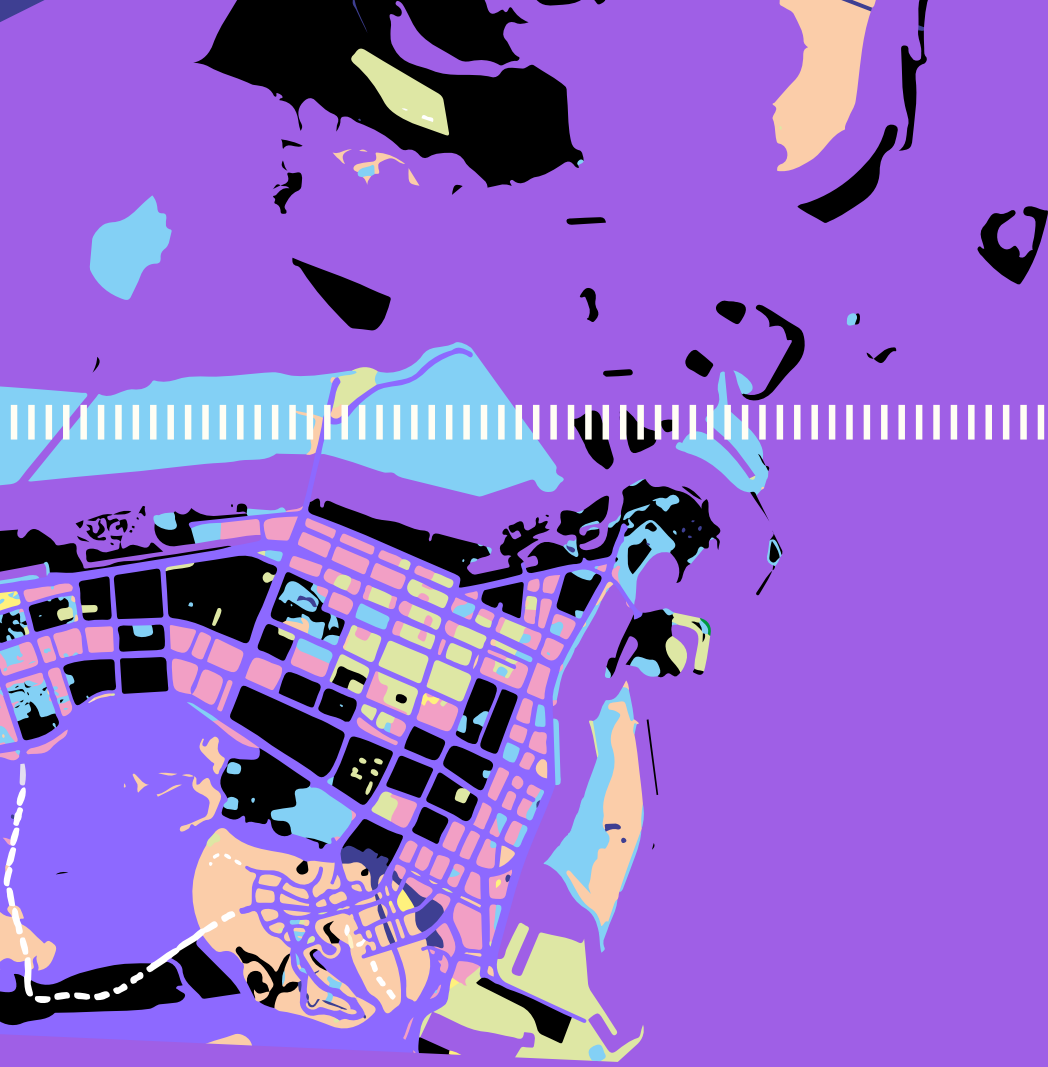
ABU DHABI CULTURE POPULATION SURVEY

DCT Abu Dhabi implemented a general cultural population survey in Abu Dhabi to provide a cultural behaviour baseline. The survey investigates Abu Dhabi's citizens and residents' perceptions of culture and relevant offerings within the emirate. The survey focused on cultural experiences, like reading books, listening to music, frequenting cultural facilities and events. It also observed the uses of traditional media such as television, radio, press) and new technologies linked to digital development. The survey results will provide the DCT Abu Dhabi culture sector with the relevant survey-based baseline KPIs to guide strategic planning in the coming years. The survey will become, over time, the main instrument for monitoring Abu Dhabi residents' behaviour in culture and media.



LIST OF ABBREVIATIONS

- ADCCI** - Abu Dhabi Chamber of Commerce and Industry
- ADCP** - Abu Dhabi Cultural Practices Module
- ADDA** - Abu Dhabi Digital Authority
- ADGM** - Abu Dhabi Global Market
- BI** - Business Intelligence Department
- CAB** - Cultural Activities Baseline
- CAD** - Cultural Activities Development
- CSP** - Culture STAT-AD Platforms
- DED** - Department of Economic Development
- DT** - Digital Transformation Department
- EU** - European Union
- ESSNet Culture** - European Statistical System Network on Culture
- Eurostat** - the statistical office of the European Union
- INSEAD** - L'Institut européen d'administration des affaires (Business School)
- GIS** - Geographical information system
- MENA Region** - Middle East and North Africa Region
- MZA** - Media Zone Authority
- NYUAD** - New York University Abu Dhabi
- PE** - Public Expenditure
- RD** - Research Development
- ROCOP** - Register of Cultural Organisations and Professionals
- SPCCB** - Social Participation and Cultural Consumption Baseline
- CSP** - Culture STAT-AD Platforms
- SCAD** - Statistics Centre Abu Dhabi
- UAE** - United Arab Emirates
- UAEU** - United Arab Emirates University
- UNESCO** - The United Nations Educational, Scientific and Cultural Organization



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