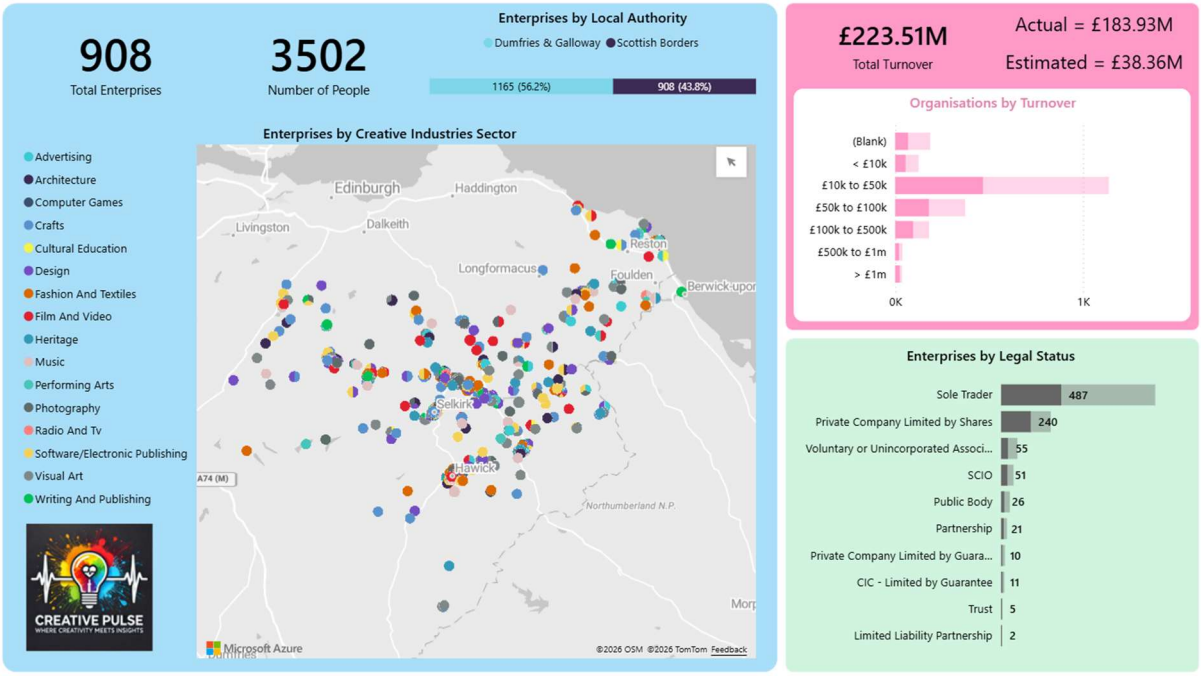
1. Creative Economy in the Scottish Borders Overview

1.1 This paper gives an overview of the Creative Economy in the Scottish Borders based on South of Scotland Enterprise's (SOSE) mapping of the sector. The data has been collated into a single evolving intelligence system called **Creative Pulse**.

1.2 **Creative Pulse** goes beyond a simple directory by systematically capturing who is active across creative and cultural sectors, what they do, where they are based, and how economic and cultural value is created and constrained. Data includes creative industries sector, employment, turnover, skills, funding received, and physical assets. This gives SOSE and partners a shared, evidence-based view of the creative economy as a ***system*** enabling better insights and a clearer understanding of where interventions such as infrastructure, skills or finance can unlock growth and wider wellbeing outcomes.



2. Key Headlines

- The creative economy in the Scottish Borders is substantial in scale, encompassing **over 900 enterprises**, supporting **around 3,500 people**, and generating **c. £223m in annual turnover**.
- Creative industries contribute to economic output, employment, community resilience, wellbeing and place identity, cutting across multiple National Outcomes in the National Performance Framework.
- The sector is **highly diverse**: a small number of globally trading firms generate significant value, while a much larger number of micro enterprises deliver participation, skills, tourism and social value.

- Evidence supports a **place-based approach to policy and investment**, rather than a single model of growth or business support.

3. The evidence

3.1 SOSE mapping of the Creative Economy, our **Creative Pulse**, provides a comprehensive single picture of creative activity in the South of Scotland. Whilst not exhaustive, it brings together information on:

- Commercial creative businesses, freelancers and sole traders
- Social enterprises, cultural venues and heritage assets
- Employment, turnover (actual and estimated), volunteers, skills and location

3.2 The dataset reflects the **real structure of the creative economy**, particularly in rural areas which is fragmented, networked, and embedded in communities rather than concentrated in large employers.

4. Scale and Economic Contribution

4.1 Scottish Borders headline indicators:

- **Enterprises:** 908
- **People supported:** 3,502
- **Annual turnover:** £223.5m

4.2 While most creative enterprises are microscale, the combined contribution is significant. The data clearly demonstrates that the creative economy is not marginal, but a **core component of the regional economy**.

4.3 Geographically:

- The **Scottish Borders** shows higher average turnover and employment per enterprise, reflecting concentrations in textiles, heritage and design.
- The Scottish Borders has a diverse creative economy spread across towns and rural communities.
- The area has a comparatively strong concentration of employment and turnover in **fashion and textiles, heritage, architecture** and **design**.
- Many other parts of the sector are made up of **freelancers**, sole traders and micro enterprises working in visual arts, crafts, music, film, photography, performing arts and publishing.
- **Commercial value and cultural value are closely connected**. Larger businesses support skilled employment and exports, while smaller organisations and practitioners contribute to participation, wellbeing, tourism and place identity.
- The evidence supports a place-based approach rather than a single model of business support or growth.

5. Alignment with National Performance Framework Outcomes

5.1 **Culture:** Creative activity is present in all parts of the region, supporting everyday cultural participation, heritage, learning and expression. The evidence strongly supports the NPF outcome on **culture as a lived, place-based asset**, not just a city centre or national organisation led concern.

5.2 **Economy and Fair Work:** Creative industries contribute to economic performance through **export focused sectors** (textiles, digital, architecture) and entrepreneurial and innovative micro businesses.

5.3 The **Creative Pulse** evidence also highlights that **creative labour markets differ from conventional models**, with high levels of self-employment and portfolio working. Fair work policy needs to reflect this reality.

5.4 **Communities:** Cultural venues, heritage organisations and creative enterprises serve as **social and civic infrastructure**, particularly in smaller towns and rural areas. Investment in creative capacity directly supports **community resilience, empowerment and local identity**.

5.5 **Wellbeing and Inclusive Growth:** The creative economy combines:

- **High participation** (large numbers of enterprises and practitioners)
- **Local economic supply chain**
- **Positive wellbeing impacts** associated with cultural participation

5.6 This aligns strongly with Scotland's wellbeing economy approach and inclusive growth ambitions.

6. Sector Structure

6.1 The evidence shows a clear distinction between:

- **High Value sectors**
  (fashion and textiles, software, architecture)
  Fewer enterprises, high turnover per worker, strong export focus.
- **Cultural participation sectors**
  (visual arts, music, crafts, performing arts)
  Many enterprises, lower turnover, but high social, cultural and place value.

6.2 A strategy focused solely on turnover growth risks undermining sectors that deliver the strongest wellbeing, participation and community outcomes.

7. Examples from Creative Pulse Data

7.1 The following examples have been derived from the **Creative Pulse** data:

- **Fashion and textiles -** is a defining strength of the Scottish Borders creative economy. Its manufacturing base supports skilled employment, exports, innovation and an internationally recognised identity. The sector also connects established manufacturers with designers, makers, heritage activity and the visitor economy. Key challenges include specialist skills, succession, global competition, energy costs and the transition to more circular production.
- **Heritage and culture** - Historic houses, museums, heritage sites, venues and community organisations form an important part of the local economy and civic infrastructure. They support employment, volunteering, education and tourism while helping communities maintain a strong sense of place. Their value is wider than turnover alone and includes participation, wellbeing, learning and local pride.
- **Architecture and design** - include established practices as well as specialists in graphic design, digital services, interpretation, product development and the built environment. These businesses provide skilled services within and beyond the region and can support wider priorities such as town centre renewal, housing, sustainability and visitor experience.
- **Film, digital and CreaTech** - The Scottish Borders has a growing mix of filmmakers, production services, software businesses, games activity and creative technology practitioners. The area's landscapes, built heritage and creative networks provide opportunities for screen production, digital content, immersive experiences and esports. Better connections between businesses, education and technical infrastructure could help this part of the economy grow.
- **Visual arts, crafts, music and performing arts** - These sectors contain many micro enterprises, freelancers, groups and community organisations. Individual turnover is often modest, but their combined contribution to cultural participation, tourism, education, community life and wellbeing is substantial. These practitioners also add distinctiveness to local places and strengthen the Borders' creative reputation.