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Location decision-making of ‘creative’ industries: insights from the media and computer games sectors

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Abstract

In the literature there has been significant research undertaken examining the ‘creative class’ thesis within the context of the locational preferences of creative workers. However, relatively little attention has been given to the locational preferences of creative companies within the same context. Accordingly, this paper reports on research conducted to qualitatively analyse the location decision-making of companies in the creative sector. We specifically address the role of so-called ‘hard’ and ‘soft’ factors in company location decision-making and assessing as well examining the variation of these factors by company size and whether they are indigenous or multi-national. The study focuses on ‘core’ creative industries in the media and computer games sectors and utilises interview data with company managers and key elite actors in the sector to investigate the foregoing questions. The results show that ‘hard’ factors are of primary importance for the location decision-making in the sectors analysed but that ‘soft’ factors play quite an important role, (especially for foreign multi-nationals) when ‘hard’ factors are satisfactory in more than one competing city-region.

Introduction

The recent adoption of ‘creative’ development strategies across Europe and the United States has been fuelled by the work of Richard Florida and particularly his ‘creative class’ thesis (Florida 2002). The infiltration of these ‘Florida-esque’ development strategies has been well documented internationally (see Stam *et al.* 2008; Zimmerman 2008; Atkinson and Easthope 2009; Cantungal and Leslie 2009; Indergaard 2009; Long 2009; Murphy and Redmond 2009, Lawton *et al.* 2010). Yet, many academics have highlighted the problems that exist with the creative class discourse and its associated development strategies, not least because the latter are often developed with limited understanding of the dynamics of these industries at the regional level (Chapain 2009). Despite the very mixed success of interventionist strategies attempting to stimulate the creative economy (see Mugnano *et al.* 2010), there continues to be a focus on the development of these industries through policy intervention at the regional level.

The core distinction that can be made between the ‘creative class’ theory and more traditional theories of economic growth is Florida’s response to the question of *why* “some places are able to develop, attract, and retain human capital/skills/creative capabilities” (Florida 2004: 3). Traditionally, individuals have tended to be attracted towards cities that are successful economically. However, Florida suggests that this traditional framework of labour following companies has been ‘turned on its head’ (Baris 2003: 42) and companies now follow labour to ‘cool cities’ where ‘creatives’ can flourish regardless of the economic opportunities available (Storper and Scott 2009). In the literature this debate has developed recently around a framework of

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the importance of 'hard' (traditional) and 'soft' (creative class) factors for economic growth. However, the overwhelming majority of research investigating this debate has centred on assessing the location choices of workers but few studies have explored the factors affecting the location choices of companies within the specific context of this debate. This research attempts to contribute to the debate specifically in this area.

The paper begins by providing an overview of the more established or 'classic' theories of industrial location theory that stress the importance of 'hard' factors of industrial location before discussing the emergence of the 'new economy' and the associated 'soft' conditions theory emerging from Florida's creative class thesis. Then the study's methodology is outlined in detail before the results are presented from a series of qualitative semi-structured interviews conducted with company managers from the media and computer games sector in Dublin, Ireland. Finally, some conclusions are drawn from the results of the empirical data and the implications of these results for economic and urban development policy are highlighted.

Industrial location theory

The relevance of 'hard' factors

Numerous spatial economic theories have been developed in an ongoing attempt to understand why some places grow and prosper, while others do not. Many of the theories which attempt to explain the processes underpinning contemporary trends in the spatial distribution of economic activities globally are modifications of classical theories of industrial location that emerged in the nineteenth and early twentieth century from scholars such as von Thünen (1826), Marshall (1890), Weber (1909) and Christaller (1933). To varying degrees, these theories focus on issues relating to factor mobility, transport costs and external economies of scale for determining industrial location decisions. The key determinants of industrial location as identified by these classical theorists relate very much to the notion of what are now referred to as the 'hard factors' or classic conditions of industrial location (see Musterd *et al.* 2007; Bontje and Musterd 2009; Murphy and Redmond 2009; Lawton *et al.* 2010; Musterd and Murie 2010). In the contemporary literature, these 'hard' factors include the availability of a skilled labour force, an accommodative institutional context, attractive tax regimes, good transportation and communications infrastructure that enables market accessibility, as well as the availability of affordable accommodation (i.e. office and retail space) (see Sassen 1991, 2002; Scott 2003). In a similar vein, Musterd and Murie (2010: 20) point to more concrete factors such as 'nearness to global financial centres, the presence of an international airport, telecommunication services and other service suppliers and clients, as well as the availability of an international labour pool'.

Having particular regard to the availability of a skilled and diverse labour pool, the importance of human capital to regional economic growth has been well documented with many highlighting the role of universities in producing high quality graduates for high-technology and knowledge-based industries (see Becker 1964; Glaeser 2005). Indeed Glaeser (2003 as cited in Glaeser 2005: 594) has pointed out that human capital predicts urban success because "high skilled people in high skilled industries may come up with more new ideas". This view is reinforced by the work of Glaeser and Saiz (2003) who found that educated cities have grown more quickly than comparable cities with less human capital for more than a century. Naphiet and

Ghoshal (1998) sought to extend the human capital theory somewhat by introducing the concept of 'intellectual capital' whereby institutions such as universities are considered to attract educated people, leading to the development of clusters of human capital and sub-sequential economic growth. Essentially, the importance of high-skilled and well-educated individuals has long been recognised to influence regional growth and development and can thus be considered a more traditional or classic factor affecting company location choice.

Added to these traditional 'hard' factors, Porter's (1998) cluster concept has recently emerged as being highly relevant for the location of industry. It relates to the concept of agglomeration economies where the assumption is that related companies cluster within close proximity to each other because it is profitable to do so. Although the idea of cluster theory has emerged relatively recently in the literature, it is closely related to the idea of 'embeddedness' which, according to Musterd and Murie (2010), was initially used by Polanyi (1944). Thus, the role of clustering in the location-decision of firms aligns itself with the more traditional factors or classic conditions for location choice.

Musterd and Murie (2010) argue that the aforementioned classic conditions associated with traditional industrial location theory are 'necessary conditions' or prerequisites for the location of advanced industry and remain essential determinants in the location decision-making process of firms (e.g. capital, qualified labour, tax policies, rent levels, labour costs, legislation etc.) . Following from this, companies, and particularly multi-national corporations, are unlikely to locate in a city where such conditions are absent or insufficient. Economic development strategies that adhere to the more traditional or classic theoretical approaches thus tend to focus on the improvement of the 'hard' conditions within city-regions to foster economic growth and development.

The emergence of 'soft' factors

There is little doubt that the contextual background from which classical theories were initially developed has changed significantly in recent years. As more complex patterns of global production, trade and investment have emerged, so too has a general acceptance that a 'new economic order' has transcended many of the world's contemporary economies. The characteristics of this new order are somewhat difficult to define succinctly and a diverse range of terminology has emerged to describe it including 'post-Fordism' (Albertsen 1988), systems of 'flexible accumulation' (Harvey 1987) and the 'new economy' (Scott 2006). Central to this new economic order is a shift towards: (1) extended networks of highly specialised firms and relatively short production cycles (i.e. 'flexible specialisation' and 'just-in-time' production systems (Piore and Sabel 1984; Harvey 1987); (2) mobile and competitive labour markets with high levels of part-time, temporary and freelance working arrangements; (3) products that compete not only in terms of price, but also on the basis of their qualitative attributes (Zukin 1995; Scott 2006).

The rise in the importance placed on the symbolic value of products relative to their practical use value (Zukin 1995; Scott 2006) has led to the expansion of the "economic branches that specialise in creating this symbolic value" (Bontje and Musterd 2009:2). These branches are now commonly associated with the 'lead edges' of growth in the contemporary economy (Scott 2006: 3) and have been broadly termed the 'creative industries'. It is worth highlighting that the difficulty in delimiting the creative industries for research purposes has been well documented

elsewhereⁱ (see Markusen 2006; Stam *et al.* 2008; Murphy and Redmond 2009; Musterd and Murie 2010).

With the emergence of this ‘new economic order’ and in particular, the ‘creative economy’, it is perhaps unsurprising that new theories relating to the location behaviour of firms and workers have developed in an attempt to understand the key drivers in the development of contemporary urban and regional economies. In particular, questions regarding the relative role of ‘hard’ and ‘soft’ factors in the location decision-making process of creative companies has become increasingly prevalent in some of the more recent academic literature on regional economic growth (see Landry 2000; Florida 2002; Scott 2006; Musterd *et al.* 2007; Bontje and Musterd 2009; Murphy and Redmond 2009; Musterd and Gritsai 2009; Storper and Scott 2009; Musterd and Murie, 2010). In particular, there has been criticism surrounding the dominance of classical location theories and the role of classic ‘hard’ location factors in analysing the competitiveness of regions in terms of their ability to attract new investment (see Landry 2000; Florida 2002). Accordingly, ‘soft’ (consumption orientated) factors have been identified as being increasingly important in understanding the location behaviour not only of companies but also individuals in the ‘creative economy’.

In contrast to the ‘hard’ location factors that are akin to more traditional theories of industrial location, ‘soft’ factors relate to the field of theory which asserts the importance of a range of urban amenities that create an environment for attracting the ‘creative’ talent that are deemed to be highly important for the most advanced high value-added high-technology and knowledge-based industry that aids regional economic development. The term ‘soft’ factor is used precisely because it is difficult to identify operational definitions for the concepts that are housed under this umbrella (Musterd and Murie 2010). However, they relate largely to the intangible conditions of a place including urban ‘amenities’ such as quality of life, the urban atmosphere or city ‘buzz’, levels of ethnic and social diversity, the quality of cultural and social facilities as well as the levels of tolerance and openness of the population. This ideological shift has been largely fuelled by Richard Florida’s proposals for regional economic growth based on his ‘creative class’ class thesis and its widespread adoption by policymakers (see Peck 2011)ⁱⁱ.

Within the ‘creative class’, Florida distinguishes between the ‘super creative core’ and ‘creative professionals’ (Stam *et al.* 2008; Zimmerman 2008; Long 2009). Those that constitute the ‘super creative core’ according to Florida (2005: 34) include “a new class of scientists and engineers, university professors, poets, actors, novelists, entertainers, artists, designers and architects as well as the thought leadership of modern society: non-fiction writers, editors, cultural figures, think-tank researchers, analysts and other opinion makers...”. In addition to this core group, Florida includes ‘creative professionals’ which encompass an eclectic mix of skilled individuals such as those working in business management, financial sectors, healthcare professions, high-technology sectors, and legal-related activities (Pratt 2008; Stam *et al.* 2008; Zimmerman 2008; Long 2009).

The thesis itself centres on what Florida refers to as the ‘three T’s’ of economic growth - Technology, Talent and Tolerance. Florida posits a causal relationship between the three T’s and regional economic development, the nature of which is succinctly explained by Murphy and Redmond (2009: 72) in their analysis of the ‘creative class’ thesis in an Irish context:

“...a ‘bohemian’ presence (Tolerance) in an area helps establish an environment that attracts talented individuals (Talent) and that this in turn attracts and generates innovative high-technological industries (Technology)”

At the core of Florida’s thesis is the creative *worker* rather than the creative *industries* specifically because it is hypothesised that these workers influence the location of companies and not necessarily the other way around. Essentially Florida’s thesis postulates that creative and knowledge-based companies now locate on the basis of where the ‘creative class’ are located; and because the ‘creative class’ choose to locate in cities on the basis of ‘soft’ factors, it follows that companies now look primarily towards ‘soft’ factors when deciding where to locate .

Although Florida’s ‘creative class theory’ appears to be ostensibly new and pioneering, Markusen (2006) highlights that upon further inspection, Florida’s ‘fuzzy’ definition of the ‘creative class’ is occupation based and synonymous with higher levels of education, and thus “he conflates creativity with high levels of education”, otherwise known as ‘human capital’. Similarly, Glaeser (2005:594) argues that Florida “acts as if there is a difference between the human capital theory of city growth and the ‘creative capital’ theory of city growth”. In response to Glaeser’s (*Ibid*) comments, Florida (2004) admits that “human capital and [his] own creative class or creative capital measures are in fact highly correlated” and that the creative class measure was developed to get a ‘better handle’ on skills than conventional education based measures offer. Florida’s (2004:3) rationale is thus to measure what “people do, rather than just what their training may say about them on paper” and is therefore occupationally, rather than educationally, based. Florida’s creative class can thus be viewed as an *extension*, rather than a *rebranding*, of classic education based measures of economic growth.

Setting aside the theoretical debates surrounding the uniqueness of certain elements of the creative class thesis, important issues can also be raised having regard to the empirical verification of the theory itself. To date, most of the empirical work assessing the validity of the ‘creative class’ thesis has been undertaken from the viewpoint of *creative workers* with few studies assessing how the thesis sits within the context of industrial location theory. Bearing that in mind, the current research has two key objectives: first, to explore the role played by ‘hard’ and soft’ factors for company location choice; second, to determine if the role played by these factors differs depending on the size of the company under investigation; or whether or not a multi-national corporation or indigenous industry is being examined.

Methodology

Defining Dublin’s Creative Industries

Delimiting the creative industries for research purposes and determining their contribution to the overall economy is rather ambiguous. Testament to this issue in an Irish context is the admission within the *Dublin City Development Plan 2011-2017* that the contribution that the creative industry offers to economic growth remains relatively unknown. Attempts have been made however to grasp the economic importance of creative knowledge sector and a study prepared for the European

Commission shows that, between 1999 and 2003, the average turnover growth² of the cultural and creative sectors in Ireland was 7.7% with a growth in value added to GDP of 8.8% (KEA 2006). In the case of Dublin, a more recent study estimated that the Gross Value Added (GVA) by creative industries to the Irish economy was in the region of €3.25 billion in 2006 (Curran and van Egerat 2010). The same study concluded that in 2006, 59% of Ireland’s creative industries were located in the Greater Dublin Area accounting for 10% (77,026 persons) of the region’s total employment(see Table 1). The dominance of the Dublin region in terms of Ireland’s creative economy warranted its selection as a case study area from which to analyse the factors influencing company location.

Much of the ambiguity surrounding the contribution of the creative sector to the economy stems from the wide range of different definitions that exist for creative industries internationally. Gibson and Kong (2005, 546) have emphasised the multiple ways in which the creative economy can be defined but they emphasise the importance of not becoming myopic about definitional issues and acknowledging the ‘...polyvalency [of creative industries] and address specific research agendas from there’. Thus, for practical purposes we use a well-known definition of creative industries utilised by the UK Department of Culture, Media and Sport (DCMS) (DCMS 2001) for operationalising the research. Using a sector-approach, DCMS define creative industries as the following sectors: Advertising; Architecture; Arts and Antique Markets; Designer Fashion; Video, Film, Music and Photography; Music and the Visual and Performing Arts; Publishing; Computer games, software and electronic publishing; and Radio and TV. It is important to note that we adhere to these definitions throughout.

Table 1. Creative industries in the GDA and nationally, 2006

NACE Code (Rev 1.1.)	Industry	Greater Dublin Area	National Total	GDA as % of National
74.4	Advertising	3,736	5,173	72%
742	Architectural and engineering activities and related technical consultancy	10,718	21,106	51%
17	Manufacture of textiles	1,355	3,921	35%
18	Manufacture of clothes; dressing and dyeing of fur	1,237	2,854	43%
19	Tanning and dressing of leather; manufacture of luggage, handbags	88	328	27%
921	Motion picture and video activities*	1,462	2,202	66%
923	Other entertainment activities	3,168	6,156	51%
927	Other recreational activities	2,597	5,257	49%
	Publishing printing and reproduction of recorded media	10,366	16,661	62%
924	News agency activities	262	392	67%
722	Computer and related activities*	23,562	36,656	64%
922	Radio and Television activities*	3,580	5,070	71%
748	Miscellaneous business activities nec	14,895	25,050	59%

²The average turnover growth is a useful economic indicator to measure the growth in a particular sector(s) in comparison to growth in the overall economy within a given timeframe.

	Total Creative Industries	77,026	130,826	59%
	Total All Industries	800,240	1,930,042	
	Creative Employment as % of All Industries	10%	7%	

Source: Curran and van Egeraat (2010, 17, Table 1).

*Industrial sectors of interest from which respondents were drawn.

Methods

Our research used qualitative semi-structured interviews to attain data from respondents. An interview guideline was drawn up which focussed on core themes specifically relating to the objectives of the research. We used semi-structured interviews because many of the in-depth questions being asked did not lend themselves to quantitative approaches.

Respondents were selected on the basis of three characteristics: (1) geographical location of the company; (2) the size of the company (in terms of the number of permanent employees) and (3) on the basis of the NACE codes for the industrial sectors of interest (Table 1). In terms of (1) we attempted insofar as was possible to achieve a geographical spread of companies from the core and periphery of the city region (see Table 2) (i.e. inner and outer city). We considered the inner city to be the area of Dublin city which falls within the boundaries of the Royal and Grand canals. For (2), the selection of company size was on the basis of the number of permanent employees at each company. We chose three categories: we included individual one-person self-employed individuals as a category because evidence suggested that these industries very often have a large number of one-person self-employed companies or freelance individuals (Ratzenbock *et. al.* 2004ⁱⁱⁱ; Scott 2006). Small enterprises were considered to be companies with 50 permanent employees or less as per the guidelines of the Irish Small Business Forum (Small Business Forum 2006) while medium to large enterprises were considered to be anything above this number. For (3), a database of companies corresponding to the NACE code sectors was compiled from information contained in the Kompass and Fame company databases. Companies were then contacted at random from compiled database listings and only individuals who were senior managers, directors, CEOs/owners were selected for analysis. This was to ensure that appropriate information could be gathered in relation to the strategic decision-making of the companies selected for analysis.

Our aim was to get at least one in interview in each of the categories defined in Table 2. However, we were able to interview more than one individual in some of the categories.

Table 2. Breakdown of respondents by company size and location

NACE 921 & 922: Motion Picture and Video; Radio and Television Activities		
	Inner City	Outer City
Self-employed/freelance	Company 1	Company 2
0-50 Employees	Company 3	Company 4
50+ Employees	Company 5&6	Company 7

NACE 722: Computer Games and Electronic Publishing		
	Inner City	Outer City
Self-employed/freelance	Company 8	Company 9
0-50 Employees	Company 10&11	Company 12
50+ Employees	Company 13	Company 14

In addition to the 14 interviews carried out with managers in the industrial sectors of interest, four expert stakeholders with knowledge of the creative sector were also interviewed (see Table 3). These experts included a local government official from Dublin City Council involved with creative urban policy, an official from the state foreign investment authority, the IDA, an official from the state indigenous enterprise authority, Enterprise Ireland and an official from the state competitiveness authority, the National Competitiveness Council. These officials were interviewed because of: (1) their expertise in the creative sector; (2) their knowledge of the drivers of indigenous enterprise in the sector; (3) their expertise on company location decision making; (4) their knowledge of competitiveness issues within the regional and national economy. A separate semi-structured interview guide was established for these individual because the nature and thrust of the questions being asked differed from those of company respondents. This led to a total of 18 interviews being undertaken for the purposes of this study.

Table 3. Breakdown of stakeholder interviews

Key Stakeholders in Creative Economy		
	Position/Organisation	Agency Role
Int. 15	Senior Manager, IDA Ireland	A government agency responsible for the promotion and development of foreign direct investment
Int.16	Senior Manager, Enterprise Ireland (EI)	A government agency responsible for the promotion and development of innovation and capacity building within indigenous enterprise
Int. 17	Policy Advisor, National Competitiveness Council (NCC)	A government body which reports to the Taoiseach on key competitiveness issues facing the Irish economy. It also makes policy recommendations on enhancing Ireland's competitive position
Int. 18	Senior Manager, Dublin City Council (DCC)	One of four administrative districts in county Dublin. DCC is the largest local authority in the Dublin region and is responsible governing Dublin city.

Results

Key 'hard' factors affecting location decisions

Labour availability

The most attractive feature of Dublin from the perspective of creative companies is undoubtedly the availability of a highly skilled and diverse labour pool. Although the importance attributed to this factor by the creative and knowledge firms researched appears to add some weight to Florida's (2002) notion that creative companies are following the location patterns of talented labour, one must remember that the availability of a suitably skilled labour pool has long been a traditional factor affecting company location theory; this observation is nothing new and reflects the well-established human capital theory (Glaeser 2005; Murkusen 2006). In any case, Florida's perception of 'talent' deviates somewhat from what is referred to here as a 'skilled and diverse labour pool' in the sense that the former relates specifically to creative individuals that are drawn to areas on the basis of 'soft' conditions. The results from our analysis revealed that company interpretations of a skilled and diverse labour pool relates more generically to the general education and skill level of the workforce (i.e. human capital) in the Dublin region rather than to a specific 'creative class' cohort (see Florida 2002). In other words, what is viewed by the companies in the media and computer games sector as skilled labour mirrors the human capital theory rather than the 'creative class' thesis.

More specifically, the results show that the availability of a skilled and diverse labour pool was a core motivating factor for company location in the Dublin region irrespective of the origin (in terms of foreign or indigenous) or size of the company interviewed. The results also show that once Ireland was decided upon as a potential location choice under consideration, both indigenous and foreign companies considered locations within the Dublin region to be of paramount importance because of the critical mass of adequate labour in this area when compared against more peripheral locations. This is succinctly described by the following respondents:

'We also looked at Dundalk and we had very little interest in those areas [beyond Dublin] purely because it would be hard to find staff. Our business here is very much global and European and Asian focussed and we need people with that knowledge. So, half the office here is non-native Irish. We have a number of people from China for example...So it's kind of difficult to find them in Dundalk...It's still not that easy to find staff but it's easier to find them in Dublin than in those outer areas...there is a lot of international people here so it is easier for us to attract people in Dublin.'

(Interview 13, Senior Manager, Company 13)

Even though the majority of the country's skilled labour is located in the Dublin region, the general view emerging from the results suggested that a shortage of skilled labour still exists in the creative sectors analysed. More specifically, the shortage relates to the volume of skilled graduates available rather than the quality of these graduates:

'We have very talented people here but we don't have sufficient volumes...There are a lot of IT or tech companies here; It [Ireland] has infrastructure; there is a programming environment; it has a good taxation regime, all those things. So the only thing you need to do is get talent in. And for myself, it's all about talent. It is the biggest contributing factor to our success. If we don't get good people then we don't succeed. It is very simple.'

(Interview 14, Senior Manager, Company 14)

The results also show that the role of grant aid offered to companies locating in the region is becoming less important than it was in the past and that skilled labour availability has emerged as the key factor attracting companies to the city-region. This highlighted in the following quote from a stakeholder at the IDA - a state organisation charged with attracting FDI into the country:

'...the classic factors are still very important. But, you know it's all relative. You could say for example ten or twenty years ago when you couldn't get grants in Ireland that grants were very important. They are not anymore; grants are not really a deal maker, certainly not for the companies that I am dealing with. So it's not grants. Increasingly what we see is it is the availability of staff. Not even labour as labour is a generic term. It's the availability of staff that either have the skills for the company or have the potential to acquire them in the workplace setting. So that is absolutely crucial because especially when you are dealing with inverted commas, creative industries, I mean the real source of their competitive advantage, what they are selling is a service. And that is a contact intensive sport; it's very people based. So really the success of any company in that situation is rooted in its people...'

(Interview 15, Senior Manager, IDA)

While the foregoing results establish that the availability of skilled labour affects the attractiveness of the Dublin region as a company location, it also has a significant impact on the location of creative companies *within* the region. In this regard, the general trend emerging from the results is that once the Dublin region has been chosen as an appropriate location, creative companies consider the availability of city centre sites as important not only for attracting, but also for retaining skilled employees. One of the key reasons for this was due to the fact that the employee profile within the companies tended to be of a young demographic and respondents felt that these workers favoured city centre living:

'...the reason we are in the city centre and not at the East Point or Sandyford [the suburbs]...is because of the young population, a young workforce; and a lot of them cycle. We only have a couple of car parking spots and they are not really used that much. We have a pretty young demographic...I think we were even looking as far as Blanchardstown [the periphery] at one stage. There was a bit of a revolt. At the end of the day that was what we were up against.'

(Interview 13, Senior Manager, Company 13)

Central city locations were favoured by the companies interviewed for a number of reasons. In addition to those mentioned in the quotation above, a number of interviews felt that central locations were important because of the perception of enhanced safety for employees in these areas when compared to the periphery. Given that many of the companies interviewed had significant numbers of female employees, having a safe location to travel to and from work was a very important consideration. This was particularly the case for companies in the media sector where work-practices tended to be more deadline-oriented and as a result staff are often required to work until late at night:

'The city centre is convenient...the vast majority of staff at production level is female...so it had to be somewhere that was relatively safe along the main thoroughfare.'

(Interview 5, Senior Partner, Company 5)

The foregoing demonstrates that the high levels of importance placed on the availability of a skilled and diverse labour pool by creative companies not only serves to attract these companies to the region, but also influences their choice of location at the sub-regional level.

Communications infrastructure

Communications infrastructure is highly important for the location choice of creative companies within the Dublin region. The interview results show that while the quality of the infrastructure is not necessarily a make-or-break factor at present, there is considerable concern about the state of the communications infrastructure generally. Once again, this trend was visible irrespective of company size or whether or not indigenous or foreign companies were interviewed. The results show that for creative companies, the city's substandard infrastructure is negatively influencing their attitudes towards doing business in Dublin; particular reference was made to the high levels of congestion and the overall dominance of the car in the city. Issues such as cross-city connectivity and the increasingly complex commuting patterns in the region were raised by companies in the sectors analysed. The following range of quotes highlights the extent of the dissatisfaction with the transport system in the region:

'The only big disadvantage is the traffic and the transport system. You know, you can get a Luas [light rail] to the Stephens Green and then you have to walk over to the other side of the city if you want to go to Tallaght. So the transport system is the disadvantage, the traffic is a disadvantage.'

(Interview 12, Senior Manager, Company 12).

We still have a relatively well educated workforce but our competitiveness has fallen because our labour costs have gone up because our infrastructure sucks...I think it [the transport system] is very negative...So let's make the investments, let's fix the infrastructure; because the infrastructure is hopeless...'

(Interview 14, Senior Manager, Company 14)

The importance of transport infrastructure and other ‘hard’ factors in attracting foreign companies to Dublin was highlighted as a key issue by a policy advisor in the National Competitiveness Council (NCC):

‘...you build on the core factors. So unless you have got the infrastructure, people don’t want to live in a city that is completely congested...And human capital, infrastructure, competitiveness, cost and business performance would be the core factors and then everything else while they are not dependent on them they would happen in tandem with them; so social inclusion for example, that would be a huge part of building core competitiveness in cities.’

(Interview 22, Policy Advisor, NCC)

The quality of the broadband system was another issue of concern for some of the companies interviewed, particularly for small and medium sized companies who do not have high-end broadband specifications with their internet service providers. In contrast, the major multi-national companies did not relay such concerns and appeared satisfied with the quality of broadband services in the region:

‘Broadband doesn’t appear to be a problem, at least not for our clients. Our clients are going to have very high spec contracts with their broadband provider whether it’s Eircom or BT. We know for example that our global connectivity is of a high quality and there is surplus capacity. It was an issue I actually raised with X in Google recently. He said there was no issue involved. So Google are just down on Barrow Street and trust me, if a company like Google had an issue with broadband, they would let us know. Now, whether most small and medium enterprises in different parts of the city or in the suburbs have issues, I don’t know...’

(Interview 15, Senior Manager, IDA)

The foregoing demonstrates that Dublin’s communications infrastructure, particularly the region’s transport system, is of core importance in terms of maintaining the attractiveness of the city region in the future. Investment into the region’s public and private transport system is a vital prerequisite in order to attract and retain creative companies in the region in what has become an increasingly competitive global environment. Once again, this demonstrates that considerable attention must be attributed by policy makers to the ‘hard’ elements of the city’s environment in the pursuit of a robust creative sector in Dublin.

Networking and agglomeration effects

Creative companies also appear to favour Dublin as a location on the basis of its accessibility to clients, supporting services and its expansive market, indicating the importance of clusters and agglomeration effects within the sectors analysed. This is epitomised, in particular, by the clustering of television and related activities in the general vicinity of the national broadcaster^{iv} to the south of the city and demonstrates that within the sector, there appears to be a strong desire to locate in close proximity to RTE given its regional and national dominance. Evidence of a similar trend can be seen in the inner city in the case of the computer games industry, where a number of

small creative firms are located in the ‘Digital Hub’^v as evidenced by the following quote:

‘If people are looking for a provider of a service and they look at a company and they are based in Navan [in the outer periphery] and they go like - ok, they may or may not be good. But somebody based in the Digital Hub - right you are on! And a lot of students would want to be based here [in the Digital Hub] too because they feel it is a centre of excellence...We felt we had the ability to get better people and better access to people [by locating here]. And its proved that way...we started advertising for staff using this as an address long before we moved in here and the CV’s were flying in and some of them were from people who were in other companies...’

(Interview6, Owner, Company 6)

However, it is worth acknowledging that in the case of the latter, government intervention has been highly influential in the emergence of Dublin’s Digital Hub (see Bayliss 2007), whereas the television and film cluster in the south of the city was more organic and gradual in its evolution.

The results demonstrate that the benefits that can accrue from the clustering of similar economic activities are considered to be an important location factor for creative firms. Once again this is a classic (‘hard’) factor that has frequently been used to explain the location decisions of a wide range of firms (see Porter 1998) and is therefore unlikely to be a factor exclusive to the creative knowledge sector. However, the importance of these factors lends supports to Scott’s (2006) characterisation of the ‘new economy’ whereby collaborative networks and agglomerations are considered necessary in the development of specialised outputs.

‘Soft’ factors affecting location choice

Work environment

The results revealed that ‘soft’ conditions are indeed considered important for companies in order to attract and retain skilled employees and that these conditions do affect the location decisions of companies. However, our results suggest that ‘soft’ conditions play a secondary role to that of traditional factors in informing the location decisions of companies in the sectors analysed. Yet, that is not to undermine their role and many companies pointed out that they did indeed consider ‘soft’ conditions when making locations decisions and this related specifically to the quality of the office space available for staff and more specifically to the importance of the attractiveness of the work environment for staff retention. Thus, many companies interviewed placed high priority on the availability of suitable office space for employees and also on the provision of facilities within the work environment to keep staff satisfied. The flowing quotes highlight the lengths that companies in the sector go to in order to create the most pleasant work environment for attracting staff and improving staff retention:

'We try to use the twenty percent rule where twenty percent of your time is to go off and do something else and work later but to keep the morale. So we have a huge games room; so a fifth of the premises are probably the games room. There is a huge balcony where we can have a barbeque; there are pool tables; flat screens where you can play all your games; board games. We do everything. There are also things like, our kitchen is well-stocked: breakfast, lunch and a small dinner. Everything from porridge, we bring in fruit and veg and yoghurts...and then there are practical considerations - the company pays for the employees travel to and from work. We are taking our time to find the right people and the last thing we want is for them to leave...'

(Interview 14, Senior Manager, Company 14)

'I just want them [employees] happy, I just want them happy. I have worked for companies where, and some of the people here have worked for the same companies, they do not provide proper facilities for their workers. I think it is important; plus I think it is a major factor. I mean, I may not be a millionaire but I insist that we have decent computers and I insist that we have nice desks and a nice place to work. I think it's very important for people to be happy. People will want to stay. It's a freelance business so people do move around.'

(Interview 4, Managing Director, Company 4)

In a similar vein the quality of the office space itself aside from its facilities played an important role in the location and relocation decisions particularly of more established companies. This is expressed succinctly in the following quote:

'I like the fact that the offices have a lot of natural light as I had been working in a couple of places that had artificial light and I don't like putting employees into that situation; it makes them feel like they are in a battery chicken farm.'

(Interview 5, Director, Company 5)

The explicit recognition of the need to keep employees happy supports the assumption that creative workers have become increasingly mobile (Scott 2006) and the foregoing demonstrates the manner in which this trend is directly influencing the location decisions of creative companies. Such examples demonstrate the attention placed on 'soft' factors by creative companies particularly for the retention of staff, which is largely indicative of the importance attributed to attracting and retaining suitable skilled labour within the creative sector.

Urban amenities and the social and cultural environment

In the literature Florida (2002) suggests that social and cultural factors and urban 'amenities' are important for the location decision of companies in the creative economy. Our results show that to some extent this is the case for the sectors analysed but once again it must be stressed that this issue was of secondary concern. The 'soft' factors to emerge as an important consideration relates broadly to the 'buzz' or social atmosphere of the city and its cultural environment and its image as a young and happening city. Dublin is clearly still seen as being a predominantly young city (and demographically this is indeed the case) which is exciting to work and live in and this

is attractive for creative companies who tend to have disproportionate number of workers from younger age cohorts; this is attractive for these companies who feel they can access a diverse and skilled labour pool in such a city:

'Dublin is small, still perceived as a happening, cool, young place in Europe. So we find that people are pretty much very open to come to Dublin and they like the idea of Dublin. Ireland still has a very nice image as a nice place to live; whether it's true or not, I don't know. So we find people in the US with families are very happy to come here and we have a lot of South Americans. Now, they are not here for the weather, but they love it and their families love it. So it's not only the young twenty year-old engineers that we really need to attract but it's actually also family people who want to experience something else or who want to go a nice location and they like the idea of coming here...the anecdotal stories that I hear are incredibly positive.'

(Interview 14, Senior Manager, Company 14)

'Soft' factors relating specifically to the city's social and cultural environment also emerged as being important for companies within the sectors analysed. One company in particular highlighted that the range of cultural attributes and leisure facilities in particular areas of Dublin (and particularly the central area) played a significant part in the location decision:

'...the area of Smithfield is a very up and coming area. The Lighthouse cinema is moving in behind us and an ad agency done the road and some great pubs and bars and stuff like that, and it's only getting better. So we just felt it had a cultural vibe to it. We just felt that this area here is very creative, the cobblestone square is beautiful and it's still central. You can still walk into town for meetings or hob on the Luas [light rail system], so it ticked a lot of boxes for us.'

(Interview 16, Managing Director, Company 6)

The foregoing demonstrates that while 'hard' location factors are of primary importance for creative companies locating in this sector; 'soft' factors clearly play a role in the overall location decision-making process of creative companies. The 'buzz' or social atmosphere of Dublin as a city in which to live is considered particularly important for staff attraction and retention. Thus, the role of Dublin as a liveable city is perceived to be a significant factor in attracting and retaining specialised labour, which in its turn is a vital component for company development.

Discussion and conclusions

Despite the emergence of increasingly complex patterns of global production that are synonymous with the 'new economy', our results show that in the case of these specific sectors of the creative economy, classic industrial location theories continue to have the most relevance in an Irish context. Richard Florida's 'creative class' thesis has been subjected to much debate not only for its ambiguous relationship with classic 'human capital' theories of urban growth, but also because it implies that the traditional theory of labour following companies has been 'turned on its head' implying that companies no longer follow labour in the generic sense and instead

pursue the ‘creative class’. Our results suggest this is not the case for Dublin but they do indicate that Florida’s ‘soft’ factors do have some role to play in company location decisions.

The general trend emerging from our results shows that ‘hard’ factors are of primary importance in the location decision-making process of firms throughout the sectors analysed. The most important factors emerging were the availability of a skilled labour pool, the quality of the communications infrastructure and the role of networking and agglomeration effects. Despite these factors being of paramount importance, our results also revealed that ‘soft’ factors, while of a secondary concern for companies, are indeed important in the location decision-making process of companies within the media and computer games sectors. In particular, ‘soft’ factors emerge as being important particularly for foreign multi-nationals when the ‘hard’ factors tend to be similar across a number of cities being scouted for a particular location. This is exemplified in the following quote from an official at the IDA:

‘...if they are satisfied that from a ‘hard’ infrastructure perspective Dublin is adequate, the issue for them is the ‘soft’ infrastructure. So they are asking us for more information on anything that will give them a sense of the quality of life in Dublin. So they want to know is there an international school. So who would have thought that when geographers were writing about the traditional location factors that the presence of an international school would be significant or not?...they are even asking us about proximity to leisure and recreation facilities, golfing, sailing etc. because what is driving them to make this project work is that they are going to have to transfer key members of staff in an existing European operation. They are very senior, they are very experienced and they have the skill set that the company needs to actually bring the Irish operation here to begin with.’

(Interview 15, Senior Manager, IDA)

In this context, our research shows that the relative role of ‘hard’ and ‘soft’ factors varies depending on company size (i.e. large or small in terms of numbers of employees) and origin (i.e. indigenous or foreign). Broadly speaking, the research demonstrated that ‘soft’ factors play a more important role in the location decisions of foreign companies and these companies also tended to be large in size. In the case of foreign companies, it seems that the role of ‘soft’ factors becomes important once the ‘hard’ factors are deemed to be adequate in more than one competing city. In such a case, the evidence suggests that foreign companies look towards ‘soft’ conditions within cities when making a final decision on where to locate. By way of contrast, ‘hard’ factors are considerably more dominant in the location decisions of indigenous companies. This is as one might expect given that indigenous companies, which also tend to be smaller in size, often do not have the same operational scope beyond national borders and hence do not look towards alternative cities in foreign countries. Thus, our results support the contention of Musterd and Murie (2010) that the satisfactory availability of ‘hard’ conditions is a necessary pre-requisite for company location choice but that ‘soft’ factors play an important secondary role in decision-making. It is interesting also that once a decision has been made to locate in Dublin, company location choice within the city itself is also important and the role of ‘hard’ and ‘soft’ factors again come to the fore. Companies locating in the central area tend to take greater consideration of ‘soft’ factors than companies located at the outskirts

and this trend holds for companies both within the specific sectors and also between the sectors analysed. It also holds for indigenous and foreign companies and for companies of different sizes and points to the greater importance attributed to 'soft' factors in the location decisions of companies with a particularly young employee demographic.

In policy terms, despite the inherent problems associated with Florida's thesis, there has been a general acceptance of his prescriptions for urban growth by regional policy makers throughout of the world. In the case of Dublin, the following quote illustrates that attention is being increasingly shifted towards creative city policies as a means of improving the region's global competitiveness:

'...we have to stay ahead of the competitive race which is really in the field of high-end design and creative thinking, innovation and in particular the use of technology at the edge of thinking. So there is a vested interest in the city that business thrives because that is part of the revenue, it's part of the life of the city...'

(Interview 18, Senior Manager, DCC)

As the regional level becomes an increasingly important scale in the competition for highly mobile flows of global capital, it is perhaps unsurprising that the creative discourse has also become prevalent at the regional level in Ireland. The highly centralised system of urban governance in an Irish context is likely to further increase the attractiveness of creative development strategies at a regional level as their proposals assist in empowering local authorities (see McGuirk and MacLaran 2001; Lawton *et al.* 2010). Florida's economic development formula encourages the channelling of investment into the 'soft' conditions of the city despite the fact that it appears, at least in the case of Dublin, that 'hard' conditions are most crucial for investment and in most need of attention. In Dublin, the recent pursuit of a creative economy (see Lawton *et al.* 2010) would therefore appear to be directing increasingly scarce resources away from where investment is needed most. Indeed it was the 'hard' factors that company managers regarded as being least satisfactory, with many highlighting the poor standard of the transport and communications infrastructure in particular.

Moreover, regardless of whether investment measures are 'hard' or 'soft' per se, research carried out by Bayliss (2007) and Mugnano *et al.* (2010) demonstrates that policies aimed at stimulating the creative sector are unlikely to be successful given the inherently unique nature of the sector. Even if creative strategies were to succeed, several other academics have raised concerns regarding their long-term sustainability (Long 2009; Bontje *et al.* 2011; Crossa *et al.* 2010). Indeed Peck (2005, 749) warns against the widespread adoption of these strategies as there is a real risk that such "such faux-funky attractions might lapse into their own kind of 'generica'"^{vi}. Similar concerns have been raised by Bontje *et al.* (2011: 99) about the tendency for development strategies aimed at stimulating the creative economy to be developed in accordance with a "linear and universal model". Based on their analysis of the emergence of creative industries in three city-regions (i.e. Amsterdam, Birmingham and Budapest), they concluded that policymakers should develop distinctive and 'locally embedded' creative industries that reflect the distinctive legacies of individual cities.

Classic location theories, which focus on the role of 'hard' location factors and the productive capacity of regions, continue to retain their merit within the context of

the Irish media and computer games sector. Thus, if regional policy makers are serious about effectively laying the foundations necessary to restore economic well-being, then a policy reassessment is necessary. Any shift in policy orientation must acknowledge that the city's 'hard' conditions are the key to restoring and improving the region's economic competitiveness. Such findings are unlikely to be unique to Ireland indicating that a re-evaluation of regional development policies aimed at stimulating these sectors of the creative economy may be required internationally.

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ⁱA report published by the UK's Department for Culture Media and Sports (DCMS) has been an important reference point for those seeking a general and operational definition of the creative industries (Chapain and Comunian 2009; Bontje and Musterd 2009). The document considers the creative industries to include: "advertising, architecture, arts and antique markets, computer and video games, crafts, design, designer fashion, film and video, music, performing arts, publishing, software and television and radio". These industries are generally considered to constitute the 'core' industries within the creative sector.

ⁱⁱOther 'amenity and human capital' theories of urban growth also exist but Florida's creative class thesis is the central thrust of this paper. Storper and Scott (2009) offer an excellent review of amenity-driven urban growth theories.

ⁱⁱⁱBased on figures from the 2001 census, almost half (48.2 %) of the 17,949 creative industry enterprises in Vienna are so-called sole-proprietorships (Ratzenbocket. *al.*, 2004).

^{iv} A large cluster of television and related activities exists in the south city are around the Baggot Street-Ballsbridge-Donnybrook in close proximity to the national broadcaster which is located in Donnybrook.

^vThe Digital Hub is a cluster of digital content and technology enterprises located in Dublin's inner city. It was established in 2003 by The Digital Hub Development Agency (an Irish state agency).

^{vi} For a more detailed analysis of issues relating to the equity of creative development strategies see Scott (2006); Zimmerman (2008); Krueger and Buckingham (2009); Long, (2009).