

How will developments within digital technologies affect creative industries?

**Abstract**

Digital technologies are having significant effects on creative organisations as the relationship between end user and producer is in a state of change. The literature review mapped out significant key issues and effects on the creative industries, followed by primary research to test out the major themes and effects from a spectrum of industry sources and viewpoints. The literature revealed that dramatic changes in strategic management may be required as a result of emerging digital technologies. Primary research was undertaken in the form of qualitative interviews, the results of which generally contrasted with the literature, revealing conflicting opinion around the significance and overall impacts of digital technologies. The findings suggest that the creative industries are aware of basic impacts, are confident of their *trained abilities* to provide *better design*, but equally fearful of future paradigm shifts that are already taking place.

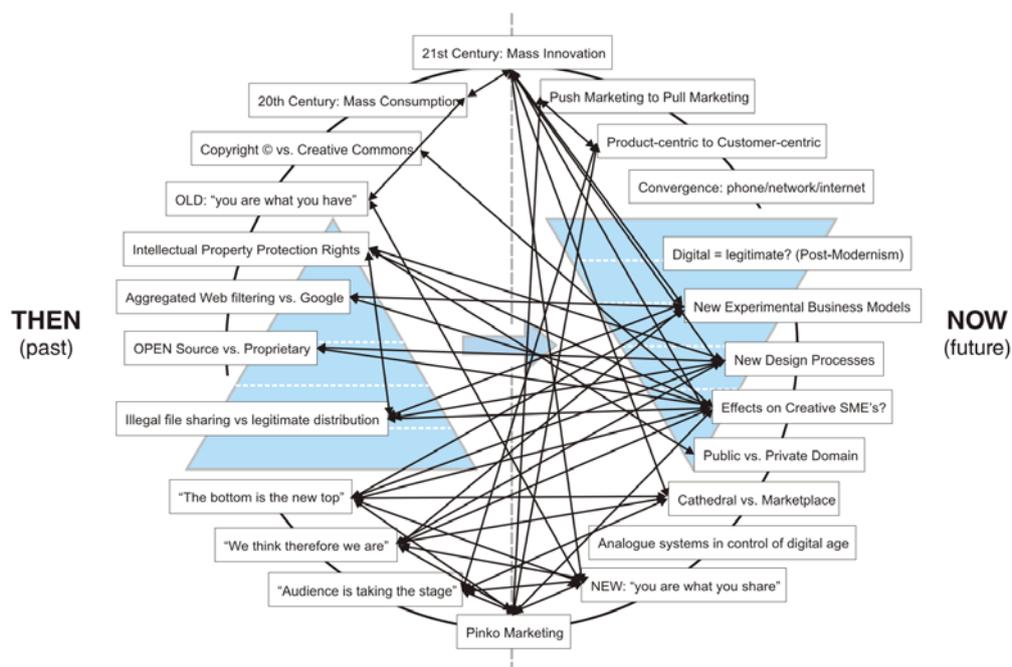
## Introduction

The global explosion of digital technologies has brought with it implications on innovation, creativity, and business models for the creative industries. Creative businesses may need to explore how to take advantage of innovation from new areas within open-network situations within constantly changing and evolving digital technology and business environments. This may have implications on existing hierarchy-based business models as technologically informed groups of people explore ways to *create value*. There is a new generation of interconnected and mass-communicating actors who may impact on the traditional end-user and on the use of creative processes and resources within creative industries.

The aim of this paper is to investigate the effect of new digital technologies on creative businesses and to determine strategies that creative businesses could employ.

## Literature

There has been a democratisation of the digital tools which are now available to everyone for free. The 20<sup>th</sup> century represented a period of mass-consumption and there is now the possibility that the 21st century will represent mass-innovation via digital tools. There is a change from a ‘*Cathedral with priest*’ to a ‘*marketplace*’ with everyone participating and traditional creative organisational hierarchies being dissolved. There is also a transition from *push* to *pull* marketing with companies now forced to a customer-centric rather product-centric focus. From initial mapping of the key issues, a relations diagram (Figure 1, *Relational Diagram*, below) was used and this identifies some of the root causes or drivers to the issues, against the possible outcomes or results.



**Figure 1. Relational diagram**

One of the main areas identified by Sapsed et al, 2008 is, ‘*understanding how innovation changes business models and markets,*’ whilst looking at the effects of new technologies and new business models on sectors of the creative industries. Sapsed et al, 2008 argue that digital technology poses new opportunities for innovation for organisations, but also that they challenge existing business models as users develop innovation for themselves. The key issues involving digital technologies and creative business include:

- **Web 2.0 (the social Web)**
- New marketing dynamics, creative ‘*OPENness*’, copyright and Creative Commons.
- **Mass creative collaboration and innovation**
- New design processes and resources within changing creative business models.

The genesis of thinking about digital technology and business implications can be traced back to 1999 and the *Cluetrain Manifesto*. The author set out a number of calls to action for businesses operating in a newly-connected marketplace via the internet (Manifesto, 1999).<sup>1</sup> The manifesto focuses on the new global-conversation taking place, whereby people and markets are becoming smarter and creating new ways to share relevant knowledge between themselves; effectively bypassing companies faster than they realise (Levine, Locke, Searls, & Weinberger, 2000). It originally pointed out a particular phenomenon -conversations among a networked world- that would have significant effects on future business planning and strategy, heightened by the over-hype of the *dot.com bubble*. More recently, Marzano commented on the changing relationships between society, consumers, products, services and businesses that were predicted by the Cluetrain Manifesto (Best, 2006). He highlighted several situations where digitisation is now affecting all products and services resulting in opposing traditional paradigm-shifts, whether the product itself is digital or not:

- Change from *local* to *global* orientation
- Change from *predictable* to *unpredictable* consumer behaviour
- Change from *highly tangible* products to *tiny products, barely more than packaged information*

Digital technology is ‘*rapidly becoming an essential facility for citizens and consumers of a modern society*’ (Department for Culture, 2009). In 2008, the ‘*Creative Britain – New Talents for the New Economy*’ report highlighted three major areas of concern for digital technology:

- The ability to *understand* its nature
- To rise to *future* challenges
- To *embrace new, innovative business models*

This means creative industries need to have the strategic abilities to exploit the changes brought about by digital technology. It isolates a number of different issues revolving around the common digital technology theme, including managing of intellectual property, effects on value chains as well production and distribution. The Engineering and Physical Sciences Research Council (EPSRC) is currently in the process of funding up to £30 million for three *Digital Economy Hubs*, over the next five years that are multidisciplinary research centres to highlight the skills needed to realise the UK’s digital economy (EPSRC, 2009). Research is however primarily focussed around digital-social inclusion projects, rather than specific effects on any particular sector such as the creative industries. Birkinshaw, Bessant, Delbridge,(2007) state that businesses should open up to new sources of ideas and means of diffusing and absorbing innovation and that research needs to be carried out in order to find organisational models that can make them happen. Research into the effects of such models

could be used in conjunction with new business models being explored, such as generating new revenue streams from existing intellectual property catalogues (designs, photography, music, film, literature for example) or providing basic tools and products for free with augmented paid for, add-on creative services. The previously mentioned issues and topics will now be reviewed in more detail.

## **Effects of New Marketing Dynamics**

### ***Push to Pull Marketing***

Digital technologies have brought with them significant changes in the dynamics of marketing. Push marketing once dominated how to get your marketing message and products out to consumers via producer, wholesaler, and retailer to end user. In the digital age, pull marketing is replacing it as the social web continues to take gain momentum. Rollins (2009) states that old marketing has been superseded by the pull of online consumers who create, share and influence each other via peer communication and collaboration by the '*individuals' networked empowerment*'. Consumers now look to each other rather than '*credentialed experts and celebrities... to discover the culturally relevant... and to create new sign-value*'. This marks a complete shift from traditional thinking and practice to its opposing opposite.

There is a traditional mode of thought that states that creativity comes from special people, in special places, in R&D laboratories and special rooms within companies, who then come up with special ideas; and in order to increase creativity you just need more special people. The Web challenges this concept as ideas can flow back-up the pipeline as a pull from consumers, ahead of the producers. The users and consumers are going through a significant change of role that creative organisations will need to be aware of and remain open to, as the *users are becoming producers* and the *consumers are becoming designers*. Here again, digital technologies have reversed traditional thinking that products and services simply flow down a value chain in a purely top-down manner. In the digital, connected world it can (and increasingly will) flow back up and will flow laterally between users in a much more complicated, previously un-experienced manner. Rollins (2009) has commented on this polar shift from old mass-marketing push tactics, to the pull of the online (social) community, '*creating, sharing and influencing each other.*' She notes that the decentralisation and exchange of ideas and intellectual property has defied creative organisational hierarchy and instead creates '*value constellations*' rather than value chains that have the power to span across not only creative, but economic, environmental, political and technological spheres.

### **Creative Organisational '*OPENness*'**

The OPEN framework is described as a strategic tool for organisations to assess its current state of openness; how much it currently leverages the nature of digital technologies as well as to direct its future uses to build brand equity via strategic digital experience. Rollins (2009) again states that in order to be an open organisation, an open framework based upon several key user behavioural attributes: *on demand, personal experience, engaging experience* and *networked experience* could be adopted (Figure 3, *The OPEN Framework*). "Openness (denoting a decentralised exchange of ideas, IP, and goodwill that defies hierarchy and boundaries and creates value constellations rather than value chains) is a meme and a macro-trend that cuts across social, technological, economic, environmental, and political spheres, and so takes up open branding and the Web's uniquely open ethos into its larger force field."



**Figure 2. The OPEN Framework**

Vargo and Lusch (2004) state that organisations should shift their strategies towards creating an open relationship with their consumers who should view them as ‘co-creators of value *rather than targets*’. This also extends beyond the creative world and is now also being adopted by educational institutions as anticipated by Leadbeater.<sup>2</sup>

### **Digital technologies and organisational identity dynamics**

Andres and Bevelo (2004) note that digital technology is responsible for massive information exchange between consumers; and at the same time opens-up organisations to be more aware and respond directly to millions of global customers in a local, intimate manner. Web 2.0 and digital technology therefore have the potential to significantly affect organisational identity, through this two-way, dynamic relationship. This model could also be used in analysis with a creative organisation to see more specifically what roles digital technologies currently have in avoiding these dysfunctions within a design based context. It can also allow external consumers and stakeholders to participate in the internal ‘*co-creation and reinterpretation of solutions through a responsive dialogue*’ (Andrews & Bevelo, 2004).

### **New Design Processes and Resources**

Digital technologies bring new ways in which ideas can be shared and communicated amongst users and producers that can have effects on new design process and resources available to creative industries. Two regularly occurring changes are now explored from the literature, *pinko* marketing and *crowdsourcing*.

Pinko Marketing is a response to the increase towards a pull-marketing environment and has significant implications on traditional design processes. It reverses the traditional model that product messages are sent top-down from marketing departments as well as changing the way in which products are assessed for development and production (Hunt, 2007).

Potential creative works (new designs, products, photography) can be uploaded to sites such as Flickr to be syndicated and aggregated to obtain feedback and general perception by an expanding community of over 8 million users (Sauvignon, 2009). This provides an unprecedented arena to test out new creativity from the consumer perspective. It also has potential effects on product design and development as traditional job roles (performed by marketing executives or product managers) that could become largely digitised and automated by the use of new mass-collaborative digital platforms. However, if correctly implemented, these could provide additional tools for creative organisations to obtain further macro-environmental information, whilst taking advantage of the open framework mindset. Larger organisations such as BT, BBC and Virgin Atlantic have, over very recent years, started experimenting with forms of open input from the audience, but as of writing the term *pinko marketing* is relatively unknown concept.<sup>3</sup> Japanese retailer Muji already circulates new

product ideas via its online member base of around 500,000 people and asks them to pre-evaluate designs through voting and commenting. Approved designs are then handed over to development departments for production (Wei, 2009). Smaller creative organisations may not have the registered user base of Muji, but they do have access to a much larger and free user base such as Flickr.

Crowdsourcing (previously known as ‘*community-based design*’) is a term that refers to a design task usually performed by employees within an organisation and outsources it in the form of an open call to a large undefined group of people using digital technologies (Howe, 2009).<sup>4</sup>



**Figure 3. The Crowdsourcing model**

It is usually adopted to leverage mass-collaboration and to obtain intellectual property from unpaid or low-paid amateur community designers to create content or solve problems in their spare time (Boutin, 2006). This has direct impacts in nearly all creative disciplines (graphic designers, web designers, illustrators, animators, products designers, film makers) as it can undermine the technical training required to complete the task as an individual within an organisation. The general nature of digital technologies and Open Source is to democratise the availability of the tools and knowledge needed to complete creative tasks, once held by closed, private organisations. However, if all users have access to the same tools, there may be the risk of an average, even poor standards of work (which has been the main criticism of the Wikipedia project (Black, 2008)) and broaden the divide between traditional, institutionally-trained as opposed to community-trained designers.

Liu, Summers and Hill (2009) point out, ‘*with digital creation and collaboration tools becoming increasingly connected and easy to use, the barrier to market is much lower*’. The short term implications imply that the emergence of a two tiered design class would widen between task-orientated designers and conceptual designers, particularly between outsourced production work to countries such as India and design centres such as New York and London (DMI, 2009). On the one hand, flatly-democratised standard technical skills would create further distance from a more technical, conceptual and elitist design class. In this case would seem to contradict the model that the situation is merely inverted, but is inverted *and* divided(ing) at the same time.

### **Impacts of Copyright & Creative Commons**

UK Copyright framework will celebrate its 300th anniversary this year and does so in a world vastly different from that in which it was originally created. The original copyright framework was set up to protect a different world of intellectual property and was implemented in order to prevent unlicensed, unregulated printing of books. Today in the context of digital technology, founder of the Creative Commons (CC) copyright license, James Boyle, noted at a NESTA conference that the Web is inherently ‘*a machine to facilitate copying;*’ in direct contrast to existing copyright law and that in the digital world, we all inadvertently press copyright laws’ triggers and we all have the potential to violate them with the simple click of a mouse.<sup>5</sup> Boyle states that it is under this entirely different and modern

playing field that these old laws are struggling to be upheld, enforceable and even relevant. Boyle recommends that businesses should go *with*, rather than fight its fundamental nature to facilitate perfect copying and duplication of content.

It was with this in mind that the Creative Commons licensing was established to offer an extension to outdated copyright laws, to allow for legal distribution of creative works without the need for lawyers to get involved. It gives copyright-holders, legal licences and tools to '*mark creative work with the freedom the creator wants to carry, so others can share, remix, or use commercially*'. This has particular implications for the creative industries such as the music industry, where digital content is circulated regularly and illegally. As Boyle notes, contrary to our natural inclinations, '*the enemy is obscurity, not copying*'. The result is that the content gets legally distributed, is heard, seen and more generally known about. This new situation subsequently raises questions about our immediate inclinations to protect and guard intellectual property and opens up the commons to new business models and strategies to generate value.

Creative Commons licensing provides an up-to-date framework to enable legal exploration of such models and is especially designed to be in harmony with the nature of digital technologies today.

There are reactions against the idea of freely sharing and distributing content as seen by the massive increase in application and protection of patents and intellectual property protection, more than doubling since 1985.<sup>6</sup> This could be seen as a reaction against the nature of digital technologies as *a machine to facilitate copying*, by those who seek to guard their intellectual property, as a form of protectionism to economic gain, for increasingly challenged and outdated business models. This battle is fought against an increasingly inter-connected base of billions of consumers who can produce, copy, participate and share content making it even harder for those to monetise creative rights from copyright content; but it does so, unsustainably against the nature of the digital tools it uses.

### **Effects of Mass Creative-collaboration & Innovation**

Rheingold, *Mass Collaboration: Smart Mobs*, 2007, have defined paradigm shifts from small group activities to mass co-operative actions, linking it back to man's earliest need to survive through collaborative efforts. This has been echoed by many collaborative creative projects that have recently been emerging via digital technologies, such as the success of Linux (without any formal organisational structure).

Rheingold claims that collaborative technology lowers creative thresholds and amplifies our ability to do things together; not as altruism, but as self-interest that benefits everyone. Earls (2009) points out that as humans, we are inherently social beings who like being together; like doing things together and have copied each other from child birth. He argues that the nature of the Web plays exactly into our natural instincts as human beings, and we simply use the Web to facilitate mass-interaction and collaboration.

These natural, inherent social instincts go a long way to explain the proliferation of some recent mass-scale collaborative efforts with digital technologies:

- When Hurricane Katrina hit the United States in 2005, teams of volunteers got together and created software to help search for relatives as part of the disaster response and was completed in a single weekend (Rheingold, *Mass Collaboration: Smart Mobs*, 2007).

- In 2007, Google, NASA, Amazon and Universities worldwide got together over night to co-ordinate a search effort for a missing professor in 132,000 miles of ocean using and sharing satellite mapping data to aid the search effort (Hafner, 2007).

It seems that in our essences as human beings, we have the in-built desire to organise, socialise, create and collaborate together and that the arrival of digital technology mediums has merely acted as a catalyst in which to realise and explore our fundamental nature. Consequences of this are sudden changes on the act of creating and the creative industries have up until now maintained the control of these tools and means of creation.

### **Implications specific to the Creative Industries**

What makes the use of these technologies different within the context of the creative industries is that new and freely-available tools and means (as well as interconnected and communicating audience) are at their essence, widely available tools to generate value *by the act of creating*. Traditional barriers to entry and access to these means no longer exist and the result is that established traditional business models are being tested to their limits by the way in which users now have the ability to organise themselves, collaborate and innovate to generate creative value independent of the industries. There are implications for other sectors too, such as Health Care, Education, Science and Politics; but initial wave of mass creativity, collaboration and innovation is in its early stages and primarily affecting the Creative Industries (such as software, entertainment, culture and media)<sup>7</sup> as it enables people to generate creative output, consumer value and intellectual property to equal standards as industry but with little or no initial costs at all. Charles Leadbeater (NESTA, 2009) focussed on how digital technology is *'changing our world, creating a culture in which more people than ever can participate, share and collaborate, ideas and information'* (Leadbeater, We-think: The power of mass creativity, 2008). He discusses the role of digital technologies, particularly Web 2.0, as allowing creative collaborations that, *"are not designed for mass production, so much as production by the masses"* and that creativity has the potential to become a mass-activity, rather than an elite one, held within creative design-based organisations. The power of these collaborations has already been witnessed with the case of Wikipedia, which has now matured and undergone research confirming that it is now actually more accurate than the printed Encyclopaedia Britannica.

Impacts on the creative industries in film, the music recording industry, broadcasters, both public and commercial as well as design services are being challenged as these industries have relied up high capital start-up costs for creating and distributing content to maintain competitive advantage, that now no longer exist. The ability to collaborate and innovate on a mass scale is challenging those that want to share and those that want retain control of it in a top-down manner.

One of the most significant impacts Leadbeater highlights is that companies inherently create top-down financially driven organisations, and then try to make them appear to be humane, democratic and bottom-up; or in other words, to try make more like the open mass-collaborative commons. This could explain why these open communities are thriving so well in the digital world as they resolve these traditional organisational tensions.

From this situation it seems that the only way for creative organisations to survive being outnumbered by the creative masses (potentially by billions of people around the World) is to embrace them and incorporate them, rather than try to compete against them. This goes a long way to explain how the nature of mass-collaboration and innovation is challenging and

changing the established organisational creativity and critiquing what it means to be a *professional* within industry, but does not frame these impacts more specifically within context of creative organisations and how these impacts are actually affecting business processes and strategy or not. Primary research interviews within creative organisation(s) regarding these issues raised could provide a context in which to frame and analyse these issues more specifically in practice.

When democratised, semi-professional digital technologies combine with mass-collaborative digital tools and platforms (such as Web 2.0), the explosion in mass-innovation can have significant effects on creative sectors.

Yochai Benkler has pointed out that camera phones, laptops and the Internet have put the tools and systems into the hands of people that have traditionally involved business models to deploy effectively (Day, 2009). The individual now has a productive piece of capital at their fingertips as well as a mass audience without the need for, and expense, of a printing press or radio aerial. This critical change was demonstrated in the recent Iranian Election protests of July 2009. Individuals on the street captured video, sounds and images that were then uploaded to a free network in the '*cloud*' (Internet). Traditional media organisations witnessed an inverted relationship to content, by performing curatorship role, rather than capturing content themselves. The director of The Photographers' Gallery notes '*the recent emergence of citizen journalists, whose images are more and more often sourced by newspapers*' appeared with the July 2005 terrorist bombings in London where 20,000 pieces of news, 400 photos and 4 camera phone videos were submitted to the BBC via mobile phones (Unit, 2009). The story was then run with headline footage from a camera phone. Here the audience took the stage, moved from user to producer and marked a complete inversion of the traditional newsroom model. It is an example where a sudden and dramatic reversal has taken place between the mass-amateur audiences challenging the comparative minority-qualified, professional practice. In both cases '*the audience is taking the stage*' by swift, sudden and opposing change brought about by the mass-enabling properties of digital technologies. There are already signs of some experimentation with new business strategies and thinking in response to the impacts of digital technologies highlighted in this review. The implications being that organisations need to embrace and be prepared to experiment with open thinking.

Several high-profile companies are already experimenting and adopting new business models and strategies that have raised awareness and challenged our natural tendency to be risk-averse to open frameworks and thinking (Boyle, Rip, Mix and Burn, 2009). The UK Government is currently involved in test beds with large investment budgets to find ways to monetise digital content for the creative industries as we move to a knowledge-based economy. Some of the main areas include of testing: such as micro-payments from embedded advertising; encouraging the sharing of IP in order to reduce IP piracy incentives and the Digital Communications Knowledge Transfer Network (KTN) to assist the government Technology Strategy Board (Board, 2009).

#### **How might future business models work?**

- Tools become distributed to consumers to help themselves
- Knowledge on how to use the tools is transferred between peers
- Leadership and governance comes from within the community
- Users put resources in and are not simply consuming

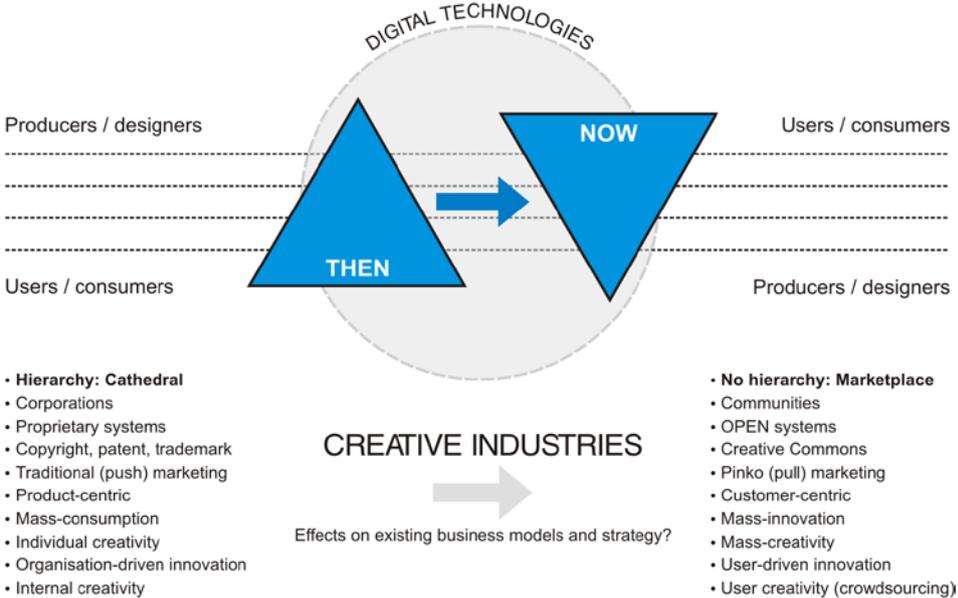
Conducting the literature review has identified some of the most significant issues and challenges facing creative organisations as well as revealing a number of underlying, linking themes that will now form the focus of the primary research in order to further investigate, analyse and synthesise them against the initial research questions and objectives.

Fundamental impacts of digital technologies include: facilitating mass-collaboration; creativity and innovation, the transition from push to pull marketing; consumers performing *professional* creative tasks and; new design resources and processes created

The industry responses may include: Adapting strategies and business models; government level engagement in research and/or increasing OPEN-organisational mindset. The underlying effect of these situations indicates a sense of rapid traditional paradigm inversion; brought about by the fundamental user-empowering characteristics of digital technologies, flipping traditional thinking on its head. This phenomenon underpins most situations analysed where cases of significant change are brought about by rapid and sudden shifts from one situation to the opposing-other and occurring in relatively short periods of time.

**Proposed model**

The literature review has highlighted a number of different situations and scenarios that appear to be related by this underlying linking-effect. A model of explanation of the situation is proposed in Figure 4 (below).



**Figure 4. Proposed model**

The review suggests a need for a primary research investigation to determine whether or not this proposed model explains what is happening within contexts of the creative industries; as well as to obtain research that either confirms or challenges the findings so far.

**Methodology**

This empirical research is based in grounded theory as data collection will commence without any previously established theoretical framework (due to the complex and overlapping nature of the issues revealed by the Mind Map, *Figure 1*). The research seeks the opinions of expert

participants; through their experience and observations, an interpretivist stance will be most suitable, as it will help to uncover deep, hidden attitudes and beliefs around the themes.

### **Assumptions**

Fundamental shifts in traditional thinking to an inverse situation – ‘*the audience is taking the stage*’.

Transition from *push* to *pull* marketing: “As the so-called social web began to flower, old mass marketing push tactics were superseded by the pull of an online population prolifically creating, sharing, and influencing each other.” (Rollins, 2009).

Mass creativity and innovation will continue to increase and encroach on traditional ‘trained’ designer roles: “mass creativity challenges and will continue to challenge traditional creative industries. Designers will no longer be the soul sources of knowledge or authority as the recipients now want to be participants” (Leadbeater, 2009).

Increasing *OPEN*-organisational mindset: “We are seeing a third wave of transformation in the way we organize our society, share our personal creativity, and generate innovations. It requires a new way of thinking – “open platform thinking” -- that goes against the grain of traditional business practices and conventional business wisdom.” (Rheingold, Saveri, Vian, Chai et al, 2006)

While qualitative data is important to answering the research questions, due to the complicated nature and vast number of actors involved in the impacts of digital technology, expert qualitative interview research would reveal far more about the issues (with its multiplicity of perspectives), and allowing generalisations to be made, rather than concrete statistics alone, which is why qualitative semi-structured interviews will be used.

### **Data Collection & Analysis**

.Interviews were carried out with professionals from different disciplines within the creative industries, such as design management consultants, graphic designers, digital designers, new product development managers, digital strategists, patent and IP lawyers and government advisors on innovation strategy. General themes for interviewing were used as it ensured that the same areas were explored throughout (to allow for triangulation). This also provided more focus than a conversational approach and still allowed for a degree of freedom and adaptability to obtain information from other topics raised.

Open questions were generally used leaving flexibility for the interviewer to probe new arising issues and get objective interviewee feedback with heightened awareness of influencing concepts in the minds of the respondents. The visual explanation model (Figure 4) was used as an initial prompt for discussion (to more specifically define the discussion themes) and to obtain feedback from the respondent’s individual industry viewpoint.

### **Primary Data Analysis Approaches**

Analytical induction was used as it provides an ‘*intensive examination of strategically selected phenomenon*’ (Johnson, 2004); and much more in-line with the nature of data required. The approach generally starts with a less-defined explanation of results (themes from the visual explanation model) and when there is no other clear existing theory to use, as in this case (Moustakas, 1994). The approach allows the researcher to start with loosely defined themes, carry out research, narrow down and then select further primary research as a result; ceasing to collect data when a valid explanation is found and where, if they are not valid or relevant, can continue until research reasonably explains the phenomena. The literature review started in an immensely wide context, which was somewhat narrowed-down

into key themes. The analytical inductive approach would continue that process further, by analysing the data in the same manner, focussing further each with each interview.

### **Triangulation of analysis**

In order to provide strong, credible and believable data, triangulation is used as it seeks qualitative data from more than one person's perspective (from multiple backgrounds) around the same key themes in conjunction with the analytical induction approach (as described above). Multiple perspectives from within different industry contexts on the same subject should provide research rigour.

### **Primary Data Analysis**

Using analytical induction, a first wave of interviews was carried out using themes from the literature review. After reflection of the data (looking beyond respondents views as the only explanation), a second phase of interviews was carried out, focussing-in on unanswered themes, in order to draw reasonable explanations that could most effectively answer the research objectives. The results of both phases were loosely grouped by the literature review themes. The primary research initially presented somewhat challenging viewpoints to the findings of the literature review, down-playing the levels of significance and impact indicated. The following keywords summarise some of the first-phase findings in relation to the literature review: apprehension, disagreeing, cautiousness, challenging, opposing and optimistic.

With this in mind, the analytical induction approach was used for a second phase of interviews to probe reasons for these viewpoints by narrowing-in with questions to investigate causes for these disparities in perspectives (both interview phases are presented below).

### **Transition from *push* to *pull* marketing**

Several responses were made, indicating that the situation was not entirely shifting as indicated by the literature, but merely being extended:

*"It doesn't really change the role, it just extends the input from consumers as it still has to go through the same processes to realise them. It still has to go through the same organisational process so doesn't change much in the way they are executed in the end."* - 06DM

Other viewpoints indicated that the transition was an inevitable outcome of digital technology and that it provides a more refined extension to existing tools:

*"There are a lot of subjective things that need a larger sample. The web provides a bigger more relevant sample."* – 01AD

On threats to traditional product management positions:

*"I wouldn't say a threat but a real upheaval: a need for highly experienced ones where there is a need for qualitative approach that cannot be modelled."* – 14TS

Further probing questions revealed that a move from *push* to *pull* marketing was actually changing the nature of the relationship between the *user* and *producer* in several other ways:

*"Instead of trying to be above [consumers], we are trying to be a part of them, be on par with the consumer..."*

*...one thing that has changed within the market is that instead of people wearing the brand to give them kudos, people see wearing the product as giving the brand kudos."* - 05PD

This suggests that the nature of the interconnected, empowered audience could be causing a number of individual and subtle changes in relationship between producers and consumers (possibly building the case that paradigms *are* in a state of transition).

Initial phase 1 interview research, suggested that a transition was not impacting as significantly and aggressively as found in the literature, but on further specific phase 2 probing, signs of this shift were commented upon, somewhat re-confirming the literature.

### **Consumers performing professional creative tasks**

Signs emerged that designers and new product development managers in particular, were aware of the increasingly connected and informed audience and signs of narcissism were evident as a result of the audience increasingly undertaking creative roles:

*“Traditional design teams have an ego, we’re the designers, and we’re the ones who know what it means to be creative. There’s a lot of pride there. The danger is that everyone thinks they can design.” – 01AD*

*“We don’t ask others for input, because that’s your job. I’m the creative one.” – 04GD*

There were signs of fear about giving-up creative tasks to the audience as eventually users would end up controlling the activities of creative organisations.

*“The last position that we want to be in is to be totally driven by users because we do consider ourselves experts in doing these things, but at the same time take into consideration what’s going on out there.” – 01AD*

The literature review demonstrated that consumers are now positioned to become designers due to the nature of technological empowerment that could challenge the role of *professional designers*. A comment stated an opposing viewpoint to this:

*“...professional designers are trained to step-beside their own wishes and desires and try to understand the target group. And I think that the single-user is trying to push his own desires into the product and often he cannot see what influences his desires may have.” - 06DM*

This is interesting as it provided an argument against the literature findings. This situation may be the case for the time being, but in the future, as the consumers become even more knowledgeable and ‘*trained*’ by each other, it may be that consumers gain this knowledge and train themselves to think beside themselves as designers.

In response to bottom-up product development; the literature findings focussed around a general assumption that the majority of consumers and users would be involved in the creation process. Perhaps in reality only a small proportion may actually be involved:

*“Not every consumer is trying to influence product strategy. Some are simply not interested and would prefer to go to a competitor instead. It’s only the lead user who is interested in co-developing the product. Users are more likely to work for a company like LEGO than they are for example a company doing for example liquids to clean your house.” – 06DM*

This phenomenon may also only affect the very top lead-users (with sufficient resources) who place more value upon user generated design and who have an audience actually motivated to participate:

*“I don’t think the designer is losing his power in creating the products but he is getting better inspired by consumers.” - 06DM*

*“...there will always be a place for long, complex and sometimes tedious creative processes that require more than gimmicks” – 14TS*

Further signs that a shift in attitude is taking place between user aggregated content and ‘official’ media outlets (within the same sector highlighted in the literature review) with news content:

*“A new iPhone app that filters user aggregated news content, but not from big news sites. A shift from value from the professionals to the end consumers.” – 01AD*

Research indicates that the news media is experiencing some of the most drastic inverted traditional paradigms, due to mass user-generated content.

One of the most highly commented upon themes, respondents sought to naturally defend their positions within industry, justifying their experience and professional training above and beyond the creativity of the mass audience. Mostly in contrast to the literature, but raising important valid points in more specific situations within the industries where the implications may not be so generally influential.

### **New design resources and processes created**

A graphic designer explained a sense of organisational-unwilling to engage with new digital technologies; commenting with a sense of reluctance and inevitability:

*“We feel we are being dragged into it and it feels like something we should be doing rather than wanting to be doing.” - 04GD*

Design managers commented that new design resources only provide additional tools, rather than replacing existing ones:

*“...it is streamlining an already existing processes rather than replacing them completely. Making existing part of consumer research more effective, but not replacing, just extending the traditional approach...”*

*“...I think it is only another information stream to design, they still have to match the concepts with the brand as well.” - 06DM*

These views seemed to further down-play the more severe implications made in the literature. A senior art director subsequently commented that there is in fact a marked change in mindset particularly within the digital creative industries, as positive impacts can be quantified now (more so than in traditional graphic design organisations):

*“Before they were resistant but now they are seeing tangible results, now they want to do something about this. There is a change in attitude now.” – 01AD*

It appeared that amidst feelings of fear and uncertainty in experimenting with and adopting new digital-based design resources, some more high-profile creative organisations now have analytical proving data to convince business leaders of the tangible positive results. This suggests changes in organisational mindset are now only just starting to gain some change-momentum.

### **Increasing OPEN-organisational mindset**

While most interviewees agreed in principal that an OPEN-organisational mindset was a beneficial idea, most also agreed that it has very serious potential problems for creative organisations for a number of different reasons: *“[It] can be very dangerous if they let users choose which products to develop. If consumers of MUJI are influencing the product*

*development process, it has the danger of mis-aligning itself with its brand values, if the process is not managed...*

*...now it is user centred design and companies have to change how they deal with the way in which these processes are changing.” – 06DM.*

There were strong opinions about the extent to which an organisation should be *OPEN*, with severe implications if it is *too* open: *“You can’t let your audience dominate your strategy or design. Take-in what they say, but if you lose control of your audience then you will have a problem. You need a balance of both.” – 01AD .*

Concealing design to maintain competitive advantage was a particular issue with regard to product design and development organisations: *“If we show something, we have so much competition. They would see what we do and we need to keep what’s coming-up low-key.” – 13TS*

In this case any desire to be *OPEN* would be simply over-ruled by the competitive business need to keep intellectual property hidden from competitors.

Creative organisations demonstrated an inherent fear about the impact of negative comments by the end-users and consumers, highlighting that it is a two way mass medium, not just one way. Again possibly accounting for initial reluctance to adopt and experiment with *OPENness*: *“Most companies are very cautious because of negative comments that can come out of it.” – 01AD*

*“It’s challenging because if we do something they don’t like, they can push the responses back to the mass-audience.” - 13TS.*

The gestural sign-value (see Appendix 3) of having an *OPEN*-organisational strategy was commented as being: *“...a blurring at the moment. [It] tends to be more of a propaganda tool within organisations than real commitment (it’s cool for the sake of being mentioned as cool)” – 14TS*

Primary research feedback on this theme centred on largely negative impacts *OPENness* could have on existing processes. Whilst most agreed that is the way the industry is headed, it is done so with a sense of severe caution. In some cases *OPENness* simply went against corporate strategy and in others it contradicted. In extreme cases, it was seen as having potential to completely misalign a brand with itself. The general feeling was that it is a good way to lose ‘*control*’ of their markets, brands and consumers.

### **Business awareness of the changing environment**

There were a number of fears found on a general business-awareness level. One of the main issues indicated that creative organisations were extensively hesitant (in all sectors) about making first steps into adopting and investing in new digital technologies: *“They didn’t want to just jump in and see what happens. A lot of people are stuck in their ways and there are a lot of people that are not educated enough.” – 05PD. “Mostly business people making the decisions, they don’t want to shift until they can see the results. Slowly they are starting to see that they need a separate sector” – 01AD*

Some openly commented on their willing to let others take-the-lead position (and initial financial risks):

*“We don’t come up with the new stuff, because we let them do it first, then we take their idea and put our take on it. We don’t use our money to come up with the big ideas first... ...we let the others use their money to make it and then we follow!”*

((*Laughs – suggesting acknowledgement of the risks of financial failure resting with competitors alone*))) – 13TS.

The scale, power and enormity of the Web could also be a driving factor for fear of engagement: “*That generation is like that; more traditional and doing it the old ways. They see it as too big and scary, because they can narrow everything down so much in the marketing.*” 13TS.

Other fears indicated a fear of losing control of the mass-audience, as this could lead to being dictated to and ultimately restricting the creativity of trained professionals. “*I would say yes and no. I do agree with no hierarchy, but we don’t want to be just driven by users.*” – 01AD .

A technology specialist defined a possible root cause of fears as: “*...becoming useless as an intermediary or too fragile against competitors since they are just manufacturing interfaces*” – 14TS.

We may now be at a point where new impacts can be quantified and accounted for, encouraging high-end agencies to start adopting. A high-profile digital design consultancy agreed with the general literature findings, pointing out that: “*[It’s] a two way street. Even traditional organisations are starting to embrace that idea, because they see the results from that.*” – 01AD

Primary research on this theme demonstrated that creative organisations are highly-aware of the potential practical uses and applications of digital technologies, but are at the same time are highly-cautious about investing in research, experimentation and adoption. Other fears again are strongly evident in giving-up control to the users.

## **Conclusion**

Following on from the literature review and primary research, further reflective thought is now presented upon the data. An extensive and wide ranging literature study narrowed-down to some of the most influential and impacting key issues affecting the creative industries. This demonstrated that there is a need for *OPEN* organisational thinking/behaving, an awareness of dramatic opposing shifts to traditional business thinking, willingness to experiment with business models at all industry levels, embracing of mass-innovation, creativity and resources as well as calls for further research in the area.

The review took in a broad range of actors’ viewpoints at varying levels of organisation within the creative industries and provided a relatively different picture to the literature. Creative organisations generally felt that digital technologies were extending not shifting traditional ways of creating value, although there was clear acknowledgement of a general shift to user generated content and thinking. The idea of *design training, skills and education* provided the main defence against the ‘*mass audience taking the stage,*’ claiming that the audience simply lacks the knowledge to be a serious threat and that it merely provides an extension to *trained* designers’ tools and was not taken too seriously as capable of replacing their roles, functions and creativity.

This seemingly confident outlook rather out-shadowed underlying fears that were clearly evident. There were serious deeply-held views with resistance to embracing, adopting, experimenting and taking advantage of digital technology as it was seen to be a perfect way in which to lose control of the audience, who would then start dictating, via *untrained voices* back through established and traditional creative design processes. *OPENness* was held with an instinctive fear as it simply goes against traditional business thinking , but was something that creative organisations could see as the inevitable future that they would reluctantly be

drawn-into at some point soon. The initial steps and industry competitive-lead are happily surrendered to the to the largest organisations to experiment and test-out the best ways in which to exploit digital technologies (as well as take the financial investment and risks) for the future benefit of organisations further down the line. This interpretation is interesting because it has taken a number of existing implications of digital technologies and extended it to a largely unexplored and specific context within the creative industries. It has highlighted two opposing themes between the literature and the primary research. The literature review may take in a wider-span than primary research which is based upon individual industry perspectives of occurring phenomena. Possible causes of these opposing viewpoints could indicate that the creative industries are not yet experiencing the noted effects of digital technologies or are not fully aware of the extent of these implications. It may also be the case that the literature is over-emphasising the significance of the perceived current and future impacts; but due to the variety and number of well-informed sources indicating the contrary, it seems logical to draw a conclusion that the creative industries are perhaps in a state conscious dismissal by discrediting the significance or simply '*burying heads in the sand*' on awareness and engagement in these current and future issues. There could be a number of reasons accounting for the dissonance between the literature and primary research:

- The industries are relatively knowledge-unaware and future foresight is lacking due to the *newness* of the issues.
- The industries *are* aware, but do not see the impacts as important yet and are waiting for industry leaders to jump-in and test things out first.

Impacts have not yet been felt or experienced at more general industry levels, suggesting an *ideal* situation in which to start experimenting before changes are wider-influencing. The primary and secondary research has demonstrated that the industries need to be more aware impacts on the creative industry business planning and strategy.

### **Further research implications**

Widening the scope of primary research, may find additional confirmation or challenges to the perspectives defined by this research. The majority of respondents were of largely the same viewpoints within this research, and this could differ if carried out on a wider-scale within the creative industries.<sup>8</sup> These findings raise new questions. If creative organisations are in a state of unawareness or appreciation of potential future challenges; then how can the industries essentially become more aware, whilst combining new technologies with new business models and proliferate this knowledge at the same time to dispel fears?

### **Definitions**

Creative Industries: "*The creative industries include advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio.*" (Reform, 2008)

Digital technology: "*The current surge in connectivity and technology is fuelling information exchange among people, and at the same time allowing companies to be more aware of, and*

responsive to, millions of global customers in a more local and intimate manner” (Andrews & Bevelo, 2004).

Mass-creativity and innovation:“...*ideas are emerging from a mass of creative interaction between a wide range of people who combine different but potentially complementary insights*” (Leadbeater, *We Think Research Reports*, 2009).

Web 2.0 (a.k.a. the Social Web):The Web’s creator, Tim Berners-Lee famously commented in 2006 on Web 2.0 saying that, “*nobody even knows what it means;*” There is still confusion on its clear definition today (Anderson, 2006).<sup>9</sup> A helpful and descriptive definition found within the literature reads as follows: “*Web 2.0 is a stage of development of the Web. It is about creating an effective communication tool out of the Web for the dual and inter-related purposes of improving human knowledge and fostering collaboration.* (Leadbeater, *We Think Research Reports*, 2007)

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