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That's SIC: How Government Data Underrepresents the UK's Regional Music Sectors

Research article

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Abstract: Standard Industrial Classification (SIC) codes, a UK equivalent of the EU's NACE classification system, are used by the UK government to gather data on its industrial sectors. This data has been used to inform a 2025 "modern industrial strategy", in which the UK music industry has been included as a growth sector. Whilst the strategy is underpinned by impressive economic statistics, the government's reliance on SIC codes to assess economic performance has long been critiqued by the music industry. Given its current limited range of business identifiers, music sector practices are not accurately accounted for by SIC codes. This chapter will reinforce this notion by describing our mapping of 2,916 music organisations in the Liverpool City Region and North East Mayoral Strategic Authority. Here, inconsistencies in business self-categorisation acted as a roadblock to our understanding of regional music sector practices. Less than half of the organisations in both regions were identifiable via SIC code data. This raises the question: How can the UK government provide a coherent music industry sector strategy when the SIC code data on which the strategy is based is inaccurate? To address this, the research advocates for the adoption of an alternate method of economic estimation, based on our regional mapping. This approach works simultaneously from the top-down and bottom-up, providing regional authorities with tools to more accurately map the contribution of music industry to the local economy, as well as making transparent to music organisations the incentives for accurate self-categorisation. The inclusion of the music industry in the UK government's industrial strategy is encouraging. However, the inaccurate economic underpinning of this strategy undermines its salience. This research proposes a reformation of SIC codes in alignment with our regional findings to make clear to government the economic contribution of the UK music industry.

Keywords: *music industry • categorisation • standard industry classification • regional music sector • economic measurement*

1. Introduction

The music industries, as a constituent of the wider creative industries, have been included as one of the eight key growth sector pillars in the UK Government's Modern Industrial Strategy document (Department for Business and Trade 2024). With a commitment of £380 million of new government investment into the creative industries aimed at doubling business investment by 2035 (Department for Digital, Culture, Media & Sport 2025a), the emphasis on music as a "frontier industry" signals positive recognition of the sector and has potential implications for future government support.

All UK government strategic economic decisions are "predominantly based" on data derived from Standard Industrial Classifications (SIC) (Department for Digital, Culture, Media & Sport 2025b), collated by the Office for National Statistics (ONS 2025a). First introduced in the UK in 1948, SIC codes are five-digit classifications used to categorise businesses by the types of economic activity they perform, for use in data collection, statistical analysis and economic planning (Caston 2022). Four of the five digits in the SIC code system sit in alignment with the European Nomenclature statistique des Activités économiques dans la Communauté Européenne (NACE) and the UN's International Standard Industrial Classification (ISIC) code systems. Only the fifth digit, is UK-specific and used

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to classify an organisation at its most granular level, differing from its NACE counterpart (Office for National Statistics 2020). Despite this minor difference, it is useful to think of SIC codes as the UK-equivalent of NACE, for use in both national and international comparative contexts. When newly formed companies officially register their business, they must self-select at least one code that describes their business activities. A maximum of four separate SIC codes can be assigned. Mandatory annual declarations enable a window to modify this code assignment, but there is little available data about how frequently this occurs. Crucially, SIC codes provide a quantitative rationale for the inclusion of industrial sectors in large-scale strategy such as national growth programmes, as well as implementation of sector-specific regulations. Despite the centrality of SIC codes to such tangible government outputs, many of the classifications used are at the behest of presentational and political negotiations (Caston 2022). Consequently, the use of SIC codes in creative industry research has been regularly criticised by both academic and industry bodies due to its inaccurate representation of creative sector work (McDonald et al., 2024; UK Music 2024: 7).

The compiling of 1998's "Creative Industries Mapping Document" (Department for Digital, Culture, Media & Sport 1998) stands as an example of the presentational discrepancies with which SIC codes are associated. As Higgs and Cunningham allude:

> "The original Department for Digital, Culture, Media & Sport (DCMS) definitions of the creative industries and segments appear to align more closely with government portfolio responsibilities than with a rigorous framework to support analysis, as one did not exist." (Higgs & Cunningham 2008: 9).

The idea of a creative industries sector was a relatively novel conception in 1998. Consequently, complications of then new data-gathering techniques have overshadowed and arguably tempered criticism of the drawbacks of the original mapping document's methodology. However, it is notable that despite SIC code revisions in 2003 and 2007, a key feature of creative/music industries mapping literature to this day is a persistent criticism of SIC codes, and invariable explanations of inherent methodological problems derived from their usage. This can be seen described in the DCMS' "Creative Industries Economic Estimates Methodology":

> "While a good part of the music industry is implicitly included in the codes making up the Creative Industries Economic Estimates, the industry and occupational codes do not allow the contribution of music to be satisfactorily identified as a separate category. Even at the highest resolution of detail available in the Office for National Statistics (ONS) data we use, live music is counted alongside theatre in a single 'Performing arts' category" (DCMS 2016: 19).

Such observations are also corroborated across successive white papers, sector reports and academic articles (Higgs & Cunningham 2008; United Nations 2008; White 2009; UK Music 2024; Giles et al., 2025). Much of their criticism revolves around the inadequacy of top-down ONS methods to accurately capture economic activity derived from musical practices, owing to a conflation of music industry activity (particularly in the case of live) with the broader "performing arts", within the SIC code classification system. The reluctance of successive UK governments to make any significant adjustments to creative industries classifications has led various academic and industry bodies to posit new methodologies for accurate creative industry research that move away from top-down mapping of economic activity and instead rely on a combination of workforce mapping and surveying to estimate overall sectoral economic contribution (Higgs et al., 2008; Bakhshi et al., 2013, Potts & Cunningham 2010; McDonald et al., 2024). Despite these proposed methodologies, the Modern Industrial Strategy document still relies heavily on ONS and Companies House data. Consequently, the positive news of music's inclusion in the Modern Industrial Strategy may be undermined by a misjudgement of the number of organisations operating within it, resulting in decision-making that does not accurately reflect the nature of the sector.

Following a summary of the current status of SIC codes, the purpose of this paper is twofold. Firstly, it briefly describes our own process developing a pioneering multi-category system to accurately record businesses engaged in music activity in the Liverpool City Region (LCR).[1] This system was developed as part of a wider aim to map, with the greatest possible accuracy, the economic and cultural contribution of music to the LCR, and was

1 The Liverpool City Region (LCR) is a combined authority area in North West England comprising of the following districts: Halton, Knowsley, Liverpool, Sefton St Helens, and Wirral. 2022-25 LCR research was sponsored by the LCR Music Board, and field work conducted by Gracia Baines, Martha Cook, Grace Goodwin, Nina Himmelreich, and Eleanor Lilley.

later replicated in the North East Mayoral Strategic Authority region (NEMSA).[2] Secondly, using original data and analysis only available through our new and comprehensive multi-category system approach, the paper provides an empirical cross-comparison of music organisations as represented by obtainable SIC-code data. This process engages with and critiques the recommendations made in previous literature; namely the "creative trident" model (Higgs et al., 2008) and Data-City's Real-Time Industry Classifications (The Data City 2025) whilst highlighting the unique structural properties of the music sector and the challenges faced by academics and other national and regional bodies in accurately gathering data to measure and support it.

Our findings reveal significant disparities in SIC code allocation and the scarce use of multiple code assignments, and demonstrate that more than 40 percent of the music sector organisations catalogued are not limited companies and hence have no associated SIC code data. This latter segment comprises a complex array of sole traders, freelancers and unincorporated associations that is absent from any top-down SIC code-based attempt at statistical mapping. As our analysis will demonstrate, the disparity between SIC-code representation and our own categorisation methods are such that we would go further than previous recommendations for an alternate creative industries model. Instead, we advocate for a highly bespoke music sector-specific mapping framework, applied at a regional level and based on the triangulation of top-down and bottom-up data. Our model provides a high-fidelity, nuanced and up-to-date picture of music sector organisations within any given area in the UK and, with some calibration to integrate with other national data systems and protocols, is readily adaptable for global use.

We conclude that the fidelity of our multi-categorisation mapping model makes explicit music sector inter-connectedness that can differentiate between the activities (both creative and non-creative) engaged in by each regional organisation. We acknowledge that established models for creative industries mapping, such as Higgs, Cunningham and Bakhshi's "Creative Trident" (2008) and Bakhshi, Freeman and Higgs subsequent "Creative Intensity" (2013) metric (the proportion of total employment in an industry that is focussed on creative occupations) remain highly useful tools for creative workforce mapping and draw similar distinctions. However, following Behr et al., (2016), Bennett (2018) and Flynn, Anderson and Simmons (2026), our methodology's application gives primacy to the notion that non-musical physical infrastructure and non-creative occupations, are vital facilitators of creative musical activity. As the UK rolls out its industrial strategy, we argue that embellishing established national-level SIC code data with the level of granularity available through our regional approach offers music and the wider creative industries an opportunity to deploy more accurate data in making resource allocation decisions and measuring the government's return on investment.

2. How the DCMS and ONS use SIC Data for Economic Metrics

The UK Government's DCMS and the ONS use SIC codes as a "source of truth" framework to calculate Creative Industries economic metrics (2025). Their methodology combines various data sources and techniques.

The ONS extracts gross value added (GVA) figures for over thirty SIC codes from the Annual Business Survey, ensuring overlapping sectors, such as performing arts, are only counted once to prevent double counting. Trade statistics, including exports and imports, are similarly derived from the International Trade in Services Survey using these SIC codes.

To account for the large number of small businesses that fall below compulsory reporting thresholds, employment estimates are drawn primarily from household surveys like the Labour Force Survey, rather than company registrations. The DCMS additionally applies a "creative intensity" model, which identifies the proportion of creative jobs within each industry. Industries exceeding a set threshold are classified as part of the Creative Industries, and this method helps account for creative roles within non-creative sectors, providing a broader "Creative Economy" measure (2016).

However, as the DCMS acknowledge in Annex E of their "DCMS Sectors Economic Estimates Definitions" report, regarding the music sector, "*industry and occupation codes do not allow the contribution of music to be satisfactorily identified as a separate category... there are also challenges related to capture of micro-businesses*

2 The North East Mayoral Strategic Authority (NEMSA) is a combined authority area in North East England comprising of Durham and Northumberland unitary authorities and Gateshead, Newcastle, North Tyneside, South Tyneside and Sunderland metropolitan borough councils. 2025 NECA research was funded by the North East Mayoral Strategic Authority, with fieldwork carried out by Grace Goodwin, Nina Himmelreich, Jason Holcomb, and Eleanor Lilley.

and the inaccurate classification of music businesses in the ONS Business Register that underpins the Annual Business Survey on which GVA estimates" are produced (2016: 26).

2.1. Research Context and Our Categorisation Method

Within the context of these challenges, we were commissioned by the Liverpool Music Office to develop an extensive and rigorously detailed catalogue of the entire music sector in the LCR. The aim of measuring the makeup and scale of the region's music economy was to provide business intelligence to the Liverpool City Region Music Board (LCRMB) to aid in their policy advocacy to bodies such as Liverpool City Council and LCR Combined Authority. Recognising the SIC code assignment deficiencies described above, our research required a methodology beyond exclusive use of SIC codes.

Our research objective to meet this aim involved cataloguing every music sector business and organisation and the design of a structured data input and organisation system. The devised categorisation framework developed was built upon a combination of fieldwork-led data collection, practitioner self-categorisation and established sector typologies, notably those developed by the LCRMB themselves, and Phil Nelson from Pathways into Music (2025). This approach was further validated and refined by cross-referencing with academic literature on music industries and eliciting feedback from a series of eight consultation calls with invested local government authorities, and various national and regional level music industry representative and advocacy organisations (e.g. UK Music, LIVE, PRS for Music, Featured Artists Coalition, Music Managers Forum).

Our categorisation framework divides the music sector into ten top-level sectors (e.g. "Rehearsal and Equipment", "Recording and Distribution", "Live and Events" etc.). Each top-level sector is subdivided into sub-sectors (e.g. "Recording Process", "Recording Equipment", "Labels"), and each of these sub-sectors has (tertiary-level) categories (e.g. "Recording Studios", "Music Producer", "Promoter/concert event organisers"). The most recent iteration of this framework has ~180 distinct music sector categories. Business and organisation records are associated with a primary category, defining their core business activity, but can also be associated with any number of categories, from any sector, to reflect the variety of activities they may engage in. Additionally, each category is mapped to what we consider the closest matching SIC code.

3. Data Collection Methods

The LCR Combined Authority supplied us with a dataset derived from SIC code assignment in the LCR from their access to the Beauhurst data service (2025), which extracts and packages registered business data from Companies House. This was later supplemented via our institutional access to a similar service provided by Moody's Fame research solution (2025). Each service enables searches of the Companies House register using a variety of criteria including SIC code assignment and geo-location. Each dataset was manually cleansed to ensure only businesses and organisations understood to be directly involved in activities within the music sector economy were added to our own dataset. Concurrently, a hybrid top-down/bottom-up methodology was employed to map and catalogue music organisations within the LCR. A team of thirteen student researchers (three postgraduates and ten undergraduates) gathered data through street-based fieldwork and publicly accessible datasets including Google Maps, Companies House via SIC code searches, the LCR Music Board's lists, Charity Commission and Municipal Licensing registers. This comprehensive approach ensured an accurate profile of the regional landscape. Each resulting record was categorised according to our typology and further cross-referenced with the Companies House register (2025a) to verify limited company status and "Nature of business (SIC)" assignments.

By employing geographic information system software, we developed a publicly accessible, interactive map of the region's music organisations. This tool integrates SIC codes and business activities within our bespoke taxonomy, allowing researchers and policymakers to examine the local ecosystem at multiple levels of granularity. Consequently, it facilitates the synthesis of field-based and top-down classification frameworks, providing a robust evidence base for the sector's long-term strategic planning (Anderson et al., forthcoming).

This entire exercise was later reproduced for the NEMSA region in 2025 (LMMP 2026a), and Glasgow city in early 2026 (LMMP 2026b).

3.1. Analysis of Detailed Regional Data Collection

Out of the 1,543 organisations in the LCR dataset, 58 percent (888) were identified as having limited company status. A similar figure of 54 percent was found in the NEMSA region (743/1,373).

Our typology's primary category	Count	SIC code "match"	SIC code description	Ltd Co. ratio	Ltd Co. (%)
Bar/pub with music [venue]	354	56302	Public houses and bars	190/354	54
Promoter	77	90020	Support activities to performing arts	31/77	40
Record label	68	59200	Sound recording and music publishing activities	45/68	66
Recording studios	50	59200	Sound recording and music publishing activities	18/50	36
Social club/community centre/village hall [venue]	49	56301	Licenced clubs	25/49	51
Restaurant/cafe with music [venue]	48	56101	Licenced restaurants	26/48	54
Festival	45	90030	Artistic creation	21/45	47
Community organisation	36	90020	Support activities to performing arts	27/36	75
Instrument tutor	36	85590	Other education n.e.c.	4/36	11
Producer	31	59200	Sound recording and music publishing activities	8/31	25
Music school	31	85320	Technical and vocational secondary education	20/31	65
Rehearsal space	28	90020	Support activities to performing arts	18/28	64
Record shop	27	47630	Retail sale of music and video recordings in specialised stores	12/27	44
Large nightclub [venue]	23	56301	Licenced clubs	20/23	87
Small nightclub [venue]	21	56301	Licenced clubs	18/21	86

LCR, Liverpool City Region; SIC, Standard Industry Classifications.

Table 1. The top 15 most common primary categories attributed to businesses/organisations identified in the LCR music sector.

Table 1 presents the top fifteen most common primary categories attributed to businesses/organisations in the LCR music sector dataset, including the count and percentage of organisations identified as limited companies.

This reveals the dominance of the live music sector within the LCR. Evidenced by 67 percent (617/924) of the organisations covered in Table 1 being primarily involved in event production (e.g. promoters and various venue types). Pubs, restaurants and clubs identified here have been verified by research assistants as having regularly programmed events featuring live music and/or named DJs in the last 12 months (i.e. not all pubs and restaurants are included here).[3] Table 1 also demonstrates significant variation in limited company status across the category types.

Categories related to venues, such as Large (87 percent) and Small Nightclubs (86 percent), show a very high propensity to be limited companies. Pubs and bars are problematic in this regard in that whilst only around half have been identified as being a limited company operating in the LCR, of the 164 pubs with no apparent limited company status, sixty-nine were recorded as belonging to a pub chain/brewery registered outside of the region. Including these would bring this figure to 73 percent. Methodological issues here involve registered company names not matching the trading name of the pub or bar; difficulties in identifying which brewery chain represents the parent company for a particular pub; the fact that many brewery chains are associated with other SIC codes such as "Activities of head offices" (70100)[4]; and statistically significant numbers of publicans operating as sole traders. The category Instrument Tutor has the lowest percentage of limited companies at 11 percent, which is typical for individual self-employed roles.

3.2. Spread of Actual SIC Assignments

Table 2 presents the most frequently occurring SIC codes and confirms the actual registered business priorities of the organisations and highlights the key areas of activity in the sector.

3 The number of registered companies with 'pubs' SIC code 56302 in the LCR is 1,166.

4 According to TheDataCity (2025a), 25% of all registered companies use this SIC code.

SIC code	SIC code description	Incidence LCR
56302	*Public houses and bars*	157
90010	Performing arts	143
90020	Support activities to performing arts	135
59200	Sound recording and music publishing activities	104
90030	Artistic creation	60
90040	Operation of arts facilities	54
56101	*Licenced restaurants*	41
85520	Cultural education	40
60100	Radio broadcasting	24
82990	*Other business support service activities n.e.c.*	21
96090	*Other personal service activities n.e.c.*	20
68209	*Letting and operating of own or leased real estate n.e.c.*	20
47630	Retail sale of music and video recordings in specialised stores	18
93290	*Other amusement and recreation activities*	15
85590	*Other education n.e.c.*	13
91030	*Operation of historical sites and buildings and similar visitor attractions*	11
77291	*Renting and leasing of media entertainment equipment*	11
70100	*Public relations and communication activities*	11
59112	Video production activities	11
	Total	909

LCR, Liverpool City Region; SIC, Standard Industry Classifications.

Table 2. The most frequently occurring SIC codes for limited companies in the LCR who have self-selected.

This breakdown of core SIC code assignment is focussed on licensed activity and performing arts with the top four codes falling into two distinct but related areas. "Public houses and bars" (56302) is the single most common registered code, reflecting that small pubs and bars remain the bedrock of where live music is performed, and that regardless of these operating, at least in part, as cultural venues, the sale of alcohol and catering is their primary legal and commercial function. "Licensed restaurants" (56101) and "Licensed clubs" (56301) also feature prominently.

"Performing arts" (90010), "Support activities to performing arts" (90020), "Artistic creation" (90030) and "Operation of arts facilities" (90040) collectively represent the most dominant area, confirming that the vast majority of registered activities are arts-focused. However, "Operation of arts facilities" (90040), the closest SIC code match to the function of a music venue, is the least commonly used of these.

"Sound recording and music publishing activities" (59200) is highly ranked, indicating that content creation and rights management are a major and distinct business activity. "Cultural education" (85520) and "Other education n.e.c." (85590) are significant, showing that training and instruction are integral registered functions for a substantial portion of the limited companies in the LCR.

Several highly frequent codes (shown in italics in Table 2) do not match expected music-related categorisations (using our typology), which suggests that many limited companies are registered to cover administrative, property-holding, or miscellaneous support activities in addition to their core cultural and entertainment functions.

3.3. Expected Versus Actual SIC Code Assignment

Given that SIC code assignment is based upon self-selection, and effectively an interpretation of which code best matches an intended business activity, Table 3 reveals how many limited companies in the LCR use the SIC code we would expect.

What can be observed from Table 3 is that for music venues (which dominate in terms of scale), licensed premises operation determines SIC code assignment, even when their music-focussed activity is prominent. In fact, in both the LCR and NEMSA regions, the number of companies with SIC codes for "Licensed restaurants" (56101)

Our typology's primary category	Companies count	Expected SIC code	Expected SIC assigned	Expected SIC missing	Expected SIC missing (%)
Record label	45	59200	26	19	42
Promoter	30	90020	12	18	60
Community organisation	27	90020	10	17	63
Festival	21	90030	4	17	81
Music school	20	85320	0	20	100
Large nightclub	20	56301	3	17	85
Recording studios	18	59200	12	6	33
Rehearsal space	18	90020	4	14	78
Small nightclub	18	56301	1	17	94
Theatre/opera house	15	90040	8	7	47
Radio station	15	60100	12	3	20
Equipment hire	13	77291	6	7	54
Arts centre	13	90040	9	4	31
Small music venue	12	90040	3	9	75
Performing arts for young people	12	85320	0	12	100
Record shop	12	47630	6	6	50

LCR, Liverpool City Region; SIC, Standard Industry Classifications.

Table 3. Comparison of our primary categorisation against expected/missing SIC code assignments in the LCR.

and "Public houses and bars" (56302) that also have any SIC codes from the Arts, Entertainment and Recreation (90000) series is zero.

Festival and Community Organisation categories show a high incidence of multiple codes like "Performing arts" (90010), "Artistic creation" (90030) and "Cultural education" (85520), vindicating that limited companies in the sector are inherently multidisciplinary. Companies providing music education services categories also lean heavily on the very broad "Cultural education" (85520) (which does encompass private music tuition for hobby purposes) and "Other education n.e.c." (85590) SIC codes. Arts and music schools and colleges, however, are recommended to use SIC code: "Technical and vocational secondary education" (85320), but it could be that this is mistakenly perceived to be associated with secondary education schools (ONS 2025b; Vida 2025).

The scale of mismatching is perhaps best illustrated in Table 3 based on LCR data. Only Radio Station, Recording Studios and Event Production demonstrate a strong alignment, where SIC codes are highly representative of the primary business activity, even if other codes are also present. Many categories, however, show strong divergence in assignment compared to our expected SIC Code (seen in high percentage values in the final column). It is feasible that there may be reluctance or disincentives for using select SIC codes due to tax, insurance or other concerns. Further qualitative research would be required here as most detailed analysis on SIC code use is focussed on criminal misuse, such as by Dark Money Files (2025). Our own direct communication with staff at Companies House reinforces this perception (Anonymous, online meeting, 3 November 2025).

3.4. Category Spread for Non-Limited Companies

Given that 42 percent of organisations and businesses involved in the music sector in the LCR (46 percent in NEMSA) were not identified as being structured as limited companies, the following analysis examines the spread of primary categories amongst these organisations, which likely represents freelancers, sole traders, unincorporated associations or partnerships. Whilst music venues are statistically significant and would dominate this data presentation, they have been excluded here to highlight categories where individuals or smaller, less formally structured organisations are most prevalent.

Our typology's primary category	Count	Expected SIC code
Promoter	46	90020
Instrument tutor	32	85590
Recording studios	32	59200
Festival	24	90030
Record label	23	59200
Producer	23	59200
Record shop	15	47630
Music school	11	85320
Instrument shop	11	47591
Management	10	73120
Rehearsal space	10	90020
Community organisation	9	90020
Vocal tutor	7	85590
PR company	7	73120
Amateur orchestra	6	90010
Charity organisations	6	85520
Mastering engineer	6	18129
Choir	6	90010
Online magazine	6	58190
Vocal coaching	6	85590
Tour manager	6	90020
Music magazine	5	58130
Live sound engineer	5	90020
Music blog	5	58190

LCR, Liverpool City Region; SIC, Standard Industrial Classification.

Table 4. Most common primary categorisations for non-limited companies in the LCR against expected SIC codes.

What the data shows here is that, whilst not represented in Table 4, many smaller pubs/venues operate outside a formal limited company structure, likely as sole traders or unincorporated groups. Beyond the venue sector, prominent freelancers/sole trader service roles include Instrument Tutor (32), Promoter (46), Producer (23), Vocal Tutor/Coaching (13 total), Tour Manager (6) and Recording Studios (32). These have a high non-limited company count, indicating that these operate as sole traders, frequently home-based or from small private studios. The data also shows a low barrier to entry for music media, with Blogs, Online Magazine and Music Magazine categories collectively accounting for sixteen entries, suggesting that self-publishing and media activities are often undertaken without formal company incorporation.

4. Comparing Regions

Undertaking a comparative analysis of the creative and cultural businesses and organisations catalogued in the LCR and NEMSA regions highlights general inferences regarding the use of SIC codes and identifies key similarities and differences between the two regions. Analysis of both datasets strongly suggests that SIC codes, when used as a single primary classification method, are insufficient to accurately represent the operational diversity of music sectors.

Analysis of multiple SIC code assignments in both regions demonstrates that most cultural music organisations (aligning to the Performing Arts 9000 series of SIC codes) are inherently hybrid. The most common combination is "Performing arts" and "Support activities to performing arts", indicating perhaps that companies tend to register for both to capture their involvement in the creative act and the logistics required to deliver it.

Feature	LCR	NEMSA
Limited company status	58%	54%
Core SIC code overlap	Top 4 are 56302, 59200, 90010, 90020	Top 4 are 56301, 56302, 90010, 90020
Highest expected SIC code match rate (for companies)	Radio station (80%)	Radio station (88%)
Low expected SIC code match rate	Music school	Performing arts for young people

LCR, Liverpool City Region; NEMSA, North East Mayoral Strategic Authority region; SIC, Standard Industry Classifications.

Table 5. Table comparing key features of LCR and NEMSA datasets.

4.1. Alignment Across Regions

The fundamental structure of the music sector, as defined by registered SIC code activities, is remarkably consistent across both regions, as seen in Table 5. The most frequent actual SIC codes are drawn from the same pool of Licensed Venues (56000s) and Arts/Performance (90000s), confirming that these two functions involving the physical premises and musical event delivery form the financial and legal bedrock of the sector in both regions. Whilst in both regions, categories related to education (Music School, Performing Arts for Young People) show low-to-zero alignment with the expected SIC "Technical and vocational secondary education" (85320), this may indicate a systemic preference for broader codes such as "Cultural education" (85520) or "Other education n.e.c." (85590) to classify music teaching work (though this is contrary to SIC code recommendations).

4.2. Differences Between the Regions

The differences primarily concern the dominant type of licensed premises and the specific focus within the arts sector, illustrated in Table 6. The LCR is significantly dominated by organisations classified as "Public houses and bars" (56302), both through primary category mapping and actual registered SIC codes. In contrast, the NEMSA region has a higher proportional concentration in "Licenced clubs" (56301) and "Social Club/Community Centre/Village Hall" (its largest non-limited company category), suggesting a stronger historical or regulatory presence of member/community-run clubs and social spaces.

While both regions feature extensive use of 90000 series SIC codes, NEMSA shows a clear shift in registered priority, with "Performing arts" (90010) being its most frequent actual SIC code. This suggests that the NEMSA region features more limited company registered cultural organisations who are more likely to register their core creative output as 90010 as their highest priority, while the LCR's organisations prioritise their licensed business activity.

It is also evident that the freelancer/micro business landscape differs, with the NEMSA region showing a much higher prevalence of community-focussed, non-incorporated entities (Social Clubs etc.) than the LCR, which is characterised by commercial licensed premises that are not limited companies.

4.3. Multi-Categorisation Versus Multiple SIC Code Assignment

The disparity between the number of organisations we have registered as engaging in at least two business activities (58 percent in the LCR and 33 percent in the NEMSA) versus those that have registered multiple SIC codes (17 percent and 22 percent, respectively), points to a fundamental weakness in the capacity of SIC codes to represent music activity (see Table 7).

Feature	LCR	NEMSA
Dominant venue type (categorisation)	56302 (public houses and bars) - 354	56301 (licenced clubs) - 224
Dominant venue type (by SIC code)	56302 (pubs/bars) - 157	56301 (licenced clubs) - 147
Most common SIC code	56302 (pubs/bars)	90010 (performing arts)
Non limited company concentration	Bar/pub with music (164)	Social club/community centre/village hall (167)

LCR, Liverpool City Region; NEMSA, North East Mayoral Strategic Authority region; SIC, Standard Industry Classifications.

Table 6. Table outlining key differences in features of LCR and NEMSA datasets.

Region	Total	Organisations assigned multiple categories	Percentage ratio (%)	Ltd Cos. with SIC data	Ltd Cos. with multiple SIC codes	Percentage ratio (%)
LCR	1,543	897	58	874	147	17
NEMSA	1,373	449	33	735	152	21

LCR, Liverpool City Region; NEMSA, North East Mayoral Strategic Authority region; SIC, Standard Industrial Classification.

Table 7. Table illustrating the extent of multi-categorisation and multi-SIC code assignment across each region's data.

The portfolio careers of musicians themselves, as well as the reliance of music industry activity on non-musical infrastructure, is well established (Behr et al., 2016; Help Musicians 2023; Bartleet et al., 2019). It makes sense, therefore, that accurate data capture requires some acknowledgement of the multi-faceted and interdependent nature of music sector work.

This recognition of interdependence has precedent in previously suggested conceptions of creative industries mapping. Higgs, Cunningham and Bakhshi's "Creative Trident" model differentiates between three types of creative employment: creative roles within creative industries, non-creative roles within creative industries and creative roles within non-creative industries. However, whilst this model is useful to frame creative work, the rationale behind this model is to focus only on the creative workforce in subsequent economic analysis:

> [the creative trident model] "focusses on core creative activities, excluding economic activity in related value chains not central to the creative process, such as distribution or retailing." (2008: 3).

Conversely, we would contend that it is vital that non-creative work be included in any regional mapping of the music sector, such is the degree to which music activity at a regional level is reliant on wider, non-musical infrastructure. From an advocacy perspective, identification of the multi-faceted, yet still categorisable nature of music activity, spanning across creative and non-creative fields, allows for more targeted policy decision-making, without risking an unworkable level of fidelity. The mobilisation of policy actors in non-creative industry areas is vital. Music sector issues frequently intersect with non-creative infrastructural policies that directly impact music activities (e.g. licensing and late night public transportation).

What this analysis further reveals are differences in the business structures regarding secondary activities between the two regions, or deficiencies in the depth of data collection in the NEMSA region. The data collection in the LCR has recorded secondary activities for 58 percent of all businesses and organisations, indicating that over half were involved in multiple secondary functions, whereas in the NEMSA region only 33 percent were recorded as such. It is unlikely that organisations in the LCR have significantly more complex operational profiles, and this difference relates to data collection in the NEMSA region taking place over a shorter time frame, resulting in less investigative time per organisation to capture the full extent of multiple activities.

Notwithstanding this observation, companies in the NEMSA region do appear more likely to register multiple SIC codes than those in the LCR. This may reinforce a greater in-region prevalence of performing arts cultural companies or may point to incomplete data capture of pubs and bars programming live music across a far larger and more extensively rural area.

5. Implications Regarding Use of SIC Codes for Sector Estimations and Measurement of Economic Activity

Based on the detailed comparative analysis of the two regional datasets, the use of SIC codes to determine the scale and make-up of a creative sector with cultural outputs such as music has profound weaknesses in capturing the cultural and structural complexity of the sector.

Whilst SIC codes are widely used and considered highly effective at capturing the most essential, revenue-generating and heavily regulated business activities, the scale of disparity in terms of non-limited company coverage across these regions would point to significant limitations.

The lack of a dedicated music venue or "hosts live music" SIC code is a particular concern. Most venues that programme live music would not consider themselves as involved in the "Operation of arts facilities" (90040).

However, as our data show, in both regions, live music events predominantly take place in licensed premises. These businesses are facilitating, and in most cases organising gigs, but their SIC code assignments "Public houses and bars" (56302) and "Licensed clubs" (56301) only reflect their primary identity. Their largest source of registered revenue is related to the sale of alcohol and catering, whilst this may be enhanced by the provision of live music; from a standard industry classification perspective, this activity is invisible, and from a DCMS perspective, their role as cultural spaces is absent, even accounting for their "creative intensity" model. UK Music, who lobby the UK government on behalf of major music industry interests, recognise SIC's deficiencies here and use a bespoke mechanism for counting only select live music sector revenues including counts of "*box office and onsite spending (such as food and drink) at the venue*" (2024: 8), however they disregard small-scale venues from their calculations, despite their national prevalence.

Live music helps pubs, bars, restaurants and nightclubs flourish. The majority of venues say it improves atmosphere and guest satisfaction (87 percent) and increases revenue and footfall (79 percent). Live events can increase spend per visit by 64 percent, dwell time by 61 percent and footfall by 36 percent (Gigpig 2023: 5).

Where SIC codes have merit in this sector is where there they accurately reflect single-function, technical activities. Where this alignment exists, the potential predictive power of SIC codes can be harnessed, such as "Radio Station" (60100) and "Recording Studios" (59200), where there is a corresponding high match rate in both regions for these SIC codes and our categorisation typology. Even here, conflating recording and publishing activities into a single code is problematic for delineating sub-sector nuance.

The under-representation of traditionally non-musical businesses within the total music sector output of a region, resulting from organisations choosing not to recognise creative contribution in their SIC code selection, further reiterates the need for a mapping model to recognise the fundamentally interdependent nature of music activity. Furthermore, the acknowledgement that business owners interpret their own economic activities differently to those who are using/mapping such activities demonstrates that regional sector mapping must straddle both top-down and bottom-up methods. Whilst self-registration of SIC codes is a necessary common-sense method to ensure data aligns with company owners' interpretations of their activities, in the case of pubs programming live music, the cultural and economic benefit to the region may be inadvertent, but still real, and worthy of analysis. A model that acknowledges this by working alongside music and non-music organisations in the region to develop a multi-category approach in which different levels of fidelity and nuance can be toggled, will contribute towards solving this tension. A further weakness of SIC codes is the seeming reliance on defining a single principal activity. It could be said that this might account for the low match rates across all core creative categories in our data. Where this may be the case, this failure to register the "expected" code is compounded by the very low (~20 percent) use of multiple code assignment by businesses, compared to our fieldwork's observation that it would be appropriate to multi-assign for around 60 percent of music businesses in the LCR. This is as crucial for small-scale registered companies, businesses and individuals engaged in hybridity and portfolio careers, as it is for larger, more formally established companies, as became apparent during the COVID-19 pandemic when the Professional Lighting & Sound Association (PLASA) identified that the wider music sector was deemed "invisible", and consequently undervalued or unviable due to a lack of available and relevant SIC codes, and a lack of consistent application of those that could be used (2020).

Official classifications often fail to distinguish between creative roles and their enabling functions, leading to undercounting. For example, our analysis found zero SIC codes from the 90000 series registered alongside licensed premises codes (pubs, clubs and restaurants), despite these venues regularly hosting live music. This is a known issue, where cultural activity is obscured by commercial classifications (Creative PEC 2022).

These problems point to an incompatibility between standard industrial classifications and the complex reality of music industry activities, suggesting a significant tension in including the sector in national economic planning. SIC codes measure the creative industries but largely exclude the creative economy i.e. the creative roles embedded within non-creative firms. This is usually situated in examples such as that seen in our data, where analysis of secondary categorisation shows that in the NEMSA region there is significant activity within Management and Business Services categories, but these roles are often captured by general SIC codes (70229 or 73120), meaning their creative contribution is missed, unless the businesses also assign "Support activities to the performing arts" (90020). DCMS data acknowledges that the creative economy is larger than the creative industries alone, but SIC codes provide no mechanism to track this "embedded" value (Department for Digital, Culture, Media & Sport 2016).

Other recent efforts to catalogue industry sectors have either relied on SIC code analysis with a host of caveats embedded into their methodological outlines and extensive use of estimation, median averages and extrapolation

from surveys such as the creative cluster for Wales project, Clwstwr (Centre for the Creative Economy 2025). Another organisation that recognises the fundamental failings of SIC codes is The Data City, which has developed an impressive application which sources data from a range of web-based sources to determine a new matrix of what it terms "Real-Time Industry Classifications" (2025). Whilst both models represent significant progress and feature more efficient data collection methods, they remain tied to limited company and/or SIC code-derived data as their seed source and, by ignoring non-registered business activity, underestimate the scale of sectors.

6. Conclusion

In summary, our comparative analysis across two distinct geographical regions in the UK has reiterated the inherent top-down and bottom-up problems associated with SIC code assignment for music businesses. Top-down, in that the available codes from the ONS are, in many cases, simply not adequate to describe music industry activities; and bottom-up, as reflected in businesses' singular and inconsistent self-selection of codes that do not accurately represent their multi-faceted practices. This impacts how creative and cultural assets are counted, measured, and valued, both socially and economically.

In contrast, our method of mapping a geography's music sector adopts a top-down and bottom-up approach of data capture, drawing down as much as is possible via Companies House SIC code searches; and bottom-up field sourcing of industry actors, along with a robust sector-specific categorisation typology. Whilst the methods outlined here are complex and methodologically intensive, they serve as a first step towards a significantly more accurate and representative model. Furthermore, as evidenced by the fact that our LCR-based cataloguing method was replicated wholesale in NEMSA and Glasgow, this method is not so nuanced as to risk becoming unworkable. Our experience in making the output demonstrable via public presentation of online maps and directories (LCR Music Board 2025), paves the way for extension into other regions, other creative industry sectors, the development of new emergent economic analyses and the inclusion of Standard Occupational Categories (SOC) codes.[5] Future iterations will offer alignment with equivalent systems such as NACE and/or ISIC, which will enable our methodology and processes to be internationally applicable and comparable. Furthermore, were an interoperable data model developed that could collate regionally collected data into a national repository, a more nuanced picture of a country's music sector landscape could be drawn. Such a model would be akin to the EnglandNet framework devised for UK tourism data developed in the early 2000s (Koumelis 2007; Flynn & Anderson, forthcoming).

It should be noted that at the time of writing the UK's ONS are in the process of finalising a review with recommendations for SIC codes in line with the latest NACE revisions, however these are not expected to come fully into force until 2031. It is hoped these will include better representation to account for the economic activities of music-focussed businesses. We were invited to participate in the Night Time Economy Data Steering Group, which included representatives from the ONS and presented our research methods and findings to propose an amendment to accommodate a music venue-specific code. The case for this addition was drawn from evidence provided through our analysis of music organisations in the LCR and NEMSA regions. We eagerly await the outcome of this review and revision proposals.

Though we intend that our mapping methodology be applied at the regional level to account for the highly localised nature of music industry activity, any change in the make-up of national SIC codes would longitudinally enhance the way in which the evidence gathered via our mapping can be scaled without risking a decrease in overall fidelity; a critical-mass of local data giving rise to a change in the national picture.

Beyond establishing the advanced analytical capability of our multicategory music sector mapping process, and its ability to generate novel insights for a variety of sector stakeholders, our evaluation offers two observations that nuance established theoretical perspectives:

Firstly, while the established "trident" model conception of the creative industries strives to recognise the contribution of a creative workforce operating in non-creative organisations and sectors, the lack of use of all four available SIC codes by businesses in classifying their range of activities means the contribution of businesses that do not see themselves as creative, to the creative economy (e.g. pubs and bars programming live music performances) is significantly underrepresented. This is very apparent within our datasets, derived from bottom-up

5 SOC codes are used by the ONS to classify UK job roles based on skills, qualifications, and responsibilities.

research, though is not reflected in SIC code assignments. Consistent application of a regional model such as ours would enable a mobilisation of local authorities in interrelated policy areas.

Secondly, the distinction between what constitutes creative industries activity seems dependent upon a business's self-perception of its operating status. For-profit pubs and bars in Liverpool do not consider their music programming "art" or "culture", whereas a reverse discrepancy extends to record labels, which are considered creative industries by DCMS (via 59200 SIC code) despite engaging most of their workforce in "*primarily administrative, technical, logistical or manual rather than creative*" labour (Coles 2016: 459). The self-determining and interpretive nature of SIC code registration enhances its inaccuracy while the lack of fidelity in classifications reduces their application, rendering comparisons across both time and locations ineffective.

If we were to advocate for one change, it would be for a "Hosts Live Music" SIC code. This activity classification would reflect and capture the predominant musical activity taking place within local economies; would transcend conceptions of genre, high/low art and would apply to any type of physical space (pubs, churches, sports stadiums, nightclubs, etc.).

Perhaps a more achievable and effective strategy might involve initiating locally focused marketing and encouragement campaigns for businesses to register the full range of SIC codes that describe their activities, similar to PLASA's campaign for 90020 usage (2020). Such "business education" could be driven by bodies such as music boards and regional governments and signpost which codes are relevant for select activities (as offered by our categorisation-SIC codes mapping).

To conclude, we argue that the SIC code framework is flawed; business users' understanding of the framework is flawed; and their application of the framework is flawed. The detailed, empirical evidence we offer here demonstrates that it is even less applicable to the music sector than the current literature recognises. Not only are SIC codes crude tools to capture complex and nuanced operations, the way in which they are then applied by businesses compounds this, due to a lack of understanding of their relevance and importance. These tensions are played out in a real way and have a direct impact on how music and other creative/cultural sectors are counted, measured and valued. By enhancing national SIC codes with granular regional data, our approach provides the music and creative industries with more accurate information. This allows for better resource allocation and potentially a clearer measurement of the UK's Industrial Strategy's return on investment. What we offer here is not simply a further critique of SIC codes, but an innovative and original mechanism of cataloguing and categorising. One that does not allow the deficiencies of SIC to get in the way of developing a better understanding of the music sector, better reflects and acknowledges the complexity of what exists, but is rooted in the practical and can be applied nationally and globally.

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