Federal Ministry
of Economics
and Technology

Federal Government Commissioner
for Culture and the Media

Cultural and Creative Industries
Initiative of the
Federal Government

Monitoring of Selected Economic Key Data on Culture and Creative Industries 2011

Summary

Imprint

Publisher
Federal Ministry of Economics
and Technology (BMWi)
Public Relations
11019 Berlin
www.bmwi.de

Current as of
December 2012

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PRpetuum GmbH, Munich

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Content

1. Introduction

Culture and creative industries have gained more and more importance in the public discussion. Growing recognition of creative and culture industries as an independent economic area enables the actors in this field to take on a new role in cultural and economic policies. New initiatives and programmes develop on all local, national and European levels.

The 'European Competitiveness Report 2010'[1] focused for the first time on culture and creative industries and stressed their important role for future economic development.

The Competitiveness Report triggered off various activities of the DG Education and Culture[2], DG Enterprise and Industry[3], the European Council[4] and the European Parliament[5]. The newly established European Creative Industries Alliance (ECIA) is probably one of the most important strategic measures.

ECIA[6] goes back to an initiative of the Directorate General for Enterprise and Industry and is at the core of the Commission's efforts to support culture and creative industries in Europe. It is a platform for policy decision makers and stakeholders to jointly develop adequate and improved instruments for the culture and creative industries. It is meant to counterbalance the highly fragmented market segments of the culture and creative industries and stimulate new research and innovation programmes.

In continuation of the German discussion, the *Initiative Culture and Creative Industries of the German Federal Government* (managed by the Federal Ministry of Economics and Technology and the Federal Commissioner for Cultural and Media Affairs) have established a monitoring mechanism for the culture and creative industries to report on current economic key data of the culture and creative industries. The third report presented here describes the situation of culture and creative industries in Germany 2009 to 2011.

1.1 Definition

The culture and creative industries comprise of all cultural and creative enterprises that are mainly market-oriented and deal with the creation, production, distribution and/or dissemination through the media of cultural/creative goods and services.

The economic field of the culture and creative industries comprises of the following eleven core branches or market segments: music industry, book market, art market, film industry, broadcasting industry, performing arts market, design industry, architectural market, press market, advertising market and the software and games industry (for the detailed classification of economic activities see statistical definition in the annex).

The creative act ("schöpferischer Akt") is the connecting element of all cultural and creative activity. It encompasses all artistic, literary, cultural, musical, architectural or creative content, works, products, productions or services that form the relevant core of the eleven market segments.

The category 'other' accommodates and integrates new economic activities into the classification model, such as new economic branches in arts and crafts.

1 EU Commission (2011): European Competitiveness Report 2010.

2 EU Commission (2011): *Green Paper. Unlocking the potential of cultural and creative industries*, Brussels, COM(2010).

3 DG for Enterprise and Industry (2012): Founding of the 'European Creative Industries Alliance' (ECIA).

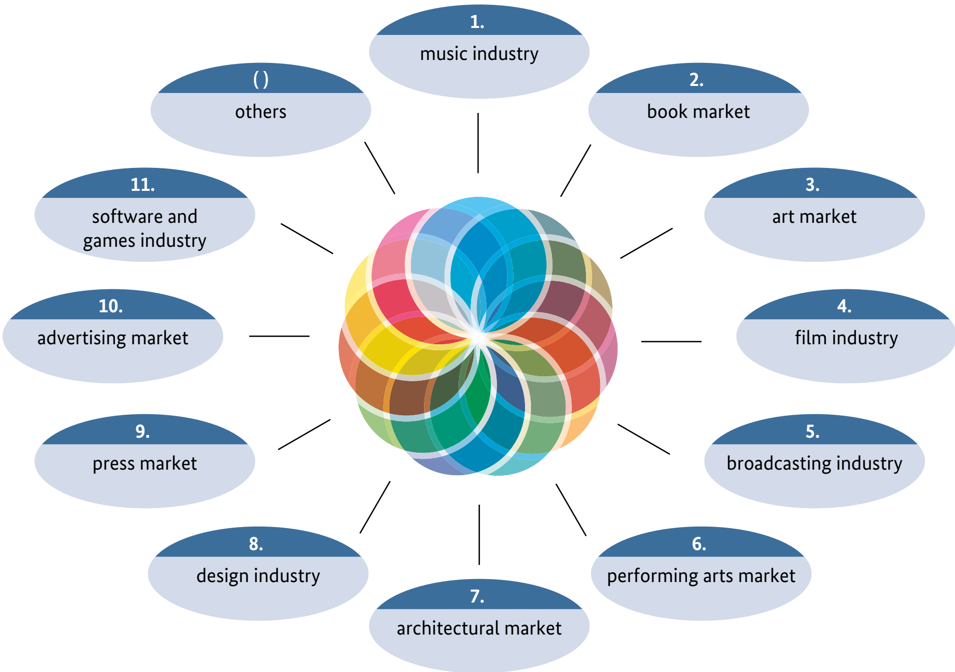
4 European Council (2011): Council conclusions on the contribution of culture to the implementation of the Europe 2020 strategy.

5 European Parliament resolution on unlocking the potential of cultural and creative industries (2010/2156(INI).

6 https://www.howtogrow.eu/ecia

The German classification is compatible with the European classification of ESSnet Culture Statistics, the European Cluster Observatory and the 2009 UNESCO Framework for Cultural Statistics.

Figure 1: The eleven market segments (core branches) of the culture and creative industries



Source: Research Report Culture and Creative Industries of the German Federal Government 2009

2. Economic Overview

2.1 Key Data on Culture and Creative Industries in Germany

The following empirical analysis is based on data provided by official German statistics. The Federal Statistical Office and the Federal Agency for Employment have provided special evaluations for this report in addition to their publicly available data. Data from the Artists' Social Insurance provide additional information.

The following remarks on the validity of data are important for the interpretation of the results: Data for the years 2009 and 2010 taken from turnover tax statistics are usually final statistical data. This refers to the data on enterprises and their turnovers. 2011 data are estimates as the turnover statistics for 2011 will only be available in spring 2013 after this report will have gone to press. Estimates were derived from 2011 short-term business statistics[7], harmonised with the 2011 employment statistics and compared against the data of previous years.

Statistical data for 2009, 2010 and 2011 from the employment statistics of the Federal Agency for Employment are preliminary data. They may therefore be revised by the Federal Agency for Employment at a later time.

Employment data (persons employed) are based on a combination of turnover tax and employment statistics and therefore also preliminary.

The figures on gross value added for the years 2009 and 2010 were calculated based on national accounting data.

Absolute figures

In 2011, the number of enterprises in the culture and creative industries amounts to almost 244,000. They achieve an overall turnover volume of more than 143 billion Euros and provide full and part time work places for almost 740,000 employees. More than one million persons work in the culture and creative industries, if employees and self-employed persons are taken together. The total contribution of the culture and creative industries towards gross value added in 2011 amounts to an estimated 62.7 billion Euros.

Percentage shares

In 2011, the share of the culture and creative industries in the overall number of enterprises amounts to almost 7.5 per cent, their share in the overall turnover amounts to 2.6 per cent, in the number of employees to 2.6 per cent and in overall employment to 3.1 per cent. The share of gross value added in the gross domestic product (GDP) is 2.4 per cent in 2011.

All data on employment and employees refer to the so-called core employment, encompassing jobs that are liable to social security deductions plus self-employed persons or entrepreneurs that are registered with the tax authorities as actors in the culture and creative industries. Mini jobs and marginally employed persons are separately indicated or mentioned for information purposes.

The short-term development of the culture and creative industries is positive throughout all categories under review in 2011.

- → The number of self-employed persons and enterprises increases by 2 per cent from 2010 to 2011. This means the number of enterprises has risen at a much higher rate than in the previous period 2009/10, when the culture and creative industries saw only a minimal increase of 0.4 per cent in the number of enterprises.
- → Turnovers will probably grow at the above-average rate of 4.4 per cent in 2011 compared to the previous year. This very good growth rate of turnovers in the culture and creative industries was determined

7 Destatis (2012): Short term business statistics in the service sectors, Wiesbaden, monthly statistics in retail sale and automobile trade; monthly report in manufacturing industries.

on the basis of the short-term business statistics. It reflects a rising business development which already started in the previous year with a turnover increase of 2.2 per cent in 2010 compared to 2009. It seems that the culture and creative industries were able to connect their economic performance to the general business upswing after the crisis year 2009.

- The strong economic development has positive effects on the labour market too. In 2011 the number of employed persons increases for the first time after the crisis and achieves a growth rate of 2.5 per cent, whereas it had decreased by 0.2 per cent in the previous period 2009/2010.

The strong increase in the number of employees is one of the reasons behind the positive development in the labour market. The number of employees liable to social insurance deductions rises by 2.7 per cent in 2011 compared to 2010. Another stabilising factor for the labour market in the culture and creative industries is the increase in the number of enterprises. The culture and creative industries have thus been able to join in the general economic growth trend.

The culture and creative industries are characterised by a high share of micro and small enterprises. The turnover per enterprise amounts to 587,000 Euros in 2011; this is equal to just one third of the general turnover that the average German enterprise achieves.

However, compared to the respective 2010 figure (which amounted to 573,000) this figure has gone up, as the total turnover in the culture and creative industries increased more than the number of enterprises. Therefore the performance of the culture and creative industries was improved in 2011 compared to 2010.

Nevertheless the general trend towards small scale structures in the culture and creative industries remains unchanged. This is also shown by employment and labour market figures. The average enterprise in the culture and creative industries has 3.0 work places liable to social insurance deductions; this figure rises to 4.0 work places if self-employed persons and entrepreneurs are also included. The percentage share of self-employed persons in all employed persons in the culture and creative industries amounts to 25 per cent.

2.2 Contribution of the Culture and Creative Industries towards Value Added

Note: The national accounting of the Federal Statistical Office does not have a separate category for the culture and creative industries as such. Culture and creative industries are an across-the-board economic branch, scattered over a great number of economic branches in the traditional statistics. They share this aspect with other, larger complexes of branches such as information and communication technologies (ICT) and the media industry with its heterogeneous structure.

The new economic classification WZ-2008 makes it possible to segregate important groups of the culture and creative industries from national accounts. Data on value added for the publishing industry (WZ no. 58), the music, film and broadcasting industry (WZ no. 59-60), the advertising market (including market research, WZ no. 73) and the group of arts and culture (WZ no. 90-92) have now become available. The latter group encompasses mainly performing arts and self-employed artists; however, it also includes gambling.

Following this definition, the culture and creative industries produce an estimated value added of about 61.5 billion Euros in 2009[8]. In 2010 this figure does not increase – for the first time there is stagnation or even a slight decrease. The gross value added now amounts to 61.4 billion Euros. While the gross domestic product

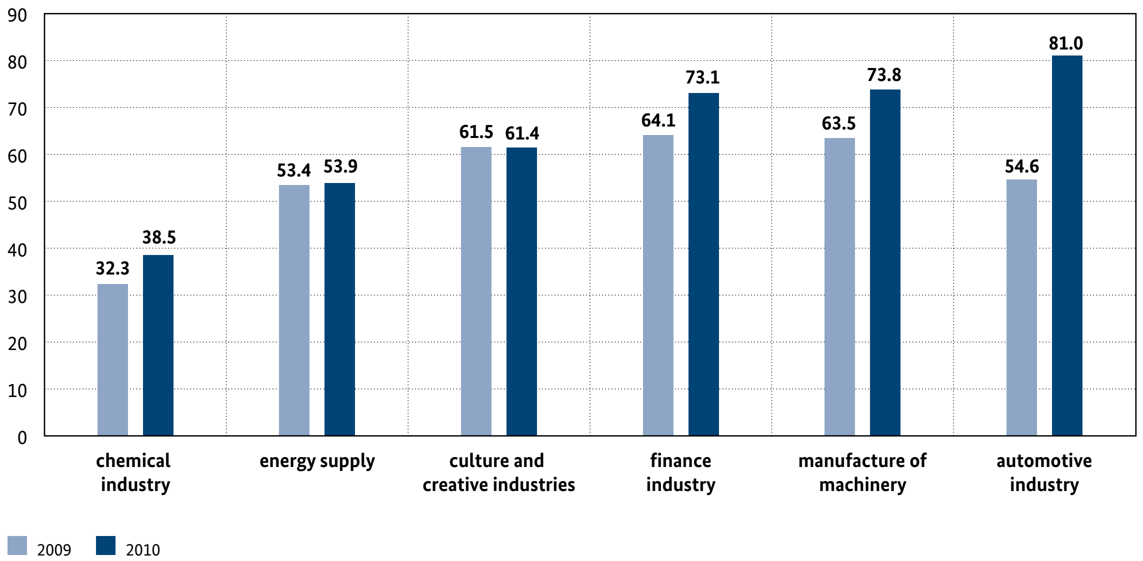
8 This means that the figure for value added generated in 2009 (62.7 billion Euros) was reduced by 1.2 billion based on the new national accounting data; see BMWi (Ed.): Monitoring of economic key data of the culture and creative industries 2010, Berlin 2012.

increases by 5.1 per cent in 2010 compared to 2009, generation of value added stagnates, leading to a sinking share in the culture and creative industries. Therefore the share of value added in the culture and creative industries amounts to only 2.5 per cent of the overall German value added generated (it amounted to 2.6. per cent according to calculations in the previous monitoring report).

Analysis of the data of selected branches leads to tentative explanations for the stagnation:

- The latest national accounting data show that the publishing industry generates value added amounting to 17.5 billion in 2010 as compared to 18 billion in 2009, which is equal to a decrease by 3.0 per cent. Book and press publishing houses experience losses, while the software and games industry defy the negative trend and show increases.
- The music, film and broadcasting industries generate a value added of 11.7 billion in 2010. This equals a decline by 0.1 billion Euros or 0.8 per cent compared to 2009. This group also shows diverging trends: while the film and broadcasting industries achieve positive rates, the music industry has to put up with negative rates.
- Following the severe slump of 2009, advertising and market research achieve a considerable increase once more and generate value added of 12.3 billion Euros in 2010. This is equal to 0.2 billion Euros or 1.5 per cent compared to the previous year.
- The market segment 'arts and culture' achieves 19.9 billion Euros in 2010, equivalent to an additional growth of 0.3 billion or 1.7 per cent compared to 2009[9]; this is, however, including the segment of gambling. Art and culture as such amount to an estimated 7 billion Euros.

Figure 2: Contribution of the culture and creative industries to gross value added, comparison across branches, 2009–2010 (in billion Euros)



Note: Estimates for the culture and creative industries based on national accounting data, automotive industries include other manufacturing of vehicles; 2009 figures corrected according to latest national accounting data; all figures in respective prices

Source: Destatis, National Accounting, detailed figures 2011, Sept. 2012; calculated by Michael Söndermann, Office for Culture Industries Research

9 The 2009 figure for the value added by the group art and culture was amended by the German Federal Statistical Office from 20.1 billion Euros to 19.6 billion Euros.

- Some of the culture and creative industries branches (such as IT and information service providers, architectural, engineering and design services) are covered by publishing and advertising and could not yet be included in this analysis.

The year 2010 shows diverging trends in the culture and creative industries, resulting in an overall stable picture of the sector. The following comparison with other economic branches shows that, despite the fact that the culture and creative industries could not keep up with the pace of the overall economy and the branches selected for comparison, its share in the value added still makes it a competitive complex of branches compared to the major traditional industries – especially on the national federal level.

A comparison of contributions to national value added in 2010 of the culture and creative industries and other important German industrial branches shows the strong position of the culture and creative industries. The chemical industry[10] generates value added of now 38.5 billion Euros and has a share of 1.5 per cent in the gross domestic product. It thus ranges far behind energy supply, which generates 53.9 billion value added and has a share of 2.2 per cent in the GDP. Energy supply is followed by the culture and creative industries with a value added of 61.4 billion Euros and a share of 2.5 per cent in the GDP. Three industrial branches – financial services, manufacturing of machinery and automotive industry – increase their generation of value added significantly and above average in 2010 and achieve volumes of 73.1 to 81.0 billion Euros. Their shares in the GDP amount to 3 per cent and more. The automotive industry in particular has overcome the crisis through strong growth. In 2010 alone the generation of value added in the automotive industry increases by 48.2 per cent – a far above-average rate. This is mainly due to strongly increasing exports into the Asian markets. In addition, the automotive industry was able to enter into a 'normal' economic development immediately after the crisis of 2009.

Data for the crisis year 2009 show that the culture and creative industries were not as strongly exposed to fluctuations as the industrial sector. However, in the following years they could not keep up with the rapid pace of growth in the industrial sector. On the other hand, the low fluctuation must be seen as a positive indicator of the relative stability of the culture and creative industries.

In general, the culture and creative industries show a delayed reaction to the overall economic development. As it may be assumed that employment as well as turnover volumes increase more strongly again in 2011, it is most probable that the generation of value added in the culture and creative industries will also increase.

2.3 Employment in the Culture and Creative Industries Compared by Market Segments

The number of persons employed in the culture and creative industries amounts to 960,000 in 2010[11]. Among these, 25 per cent are self-employed, the remaining 75 per cent or 720,000 persons are employees. The share of the culture and creative industries in overall employment amounts to 3.1 per cent.

These key data include the core area of the culture and creative industries only. Groups such as marginally self-employed persons (self-employed with an annual turnover of less than 17,500 Euros) and marginally employed persons (including about 714,000 self-employed and employed cases) are not considered here, as this will be done in a separate comparison of the culture and creative industries and traditional economic branches.

10 According to new definition excluding pharmaceutical industry and therefore with a significantly reduced volume of value added.

11 Different from other chapters, the analysis of employment data here refers to 2010 figures, because comparative 2011 data for the traditional industries such as manufacture of machinery etc. were not yet available at the time of going to press.

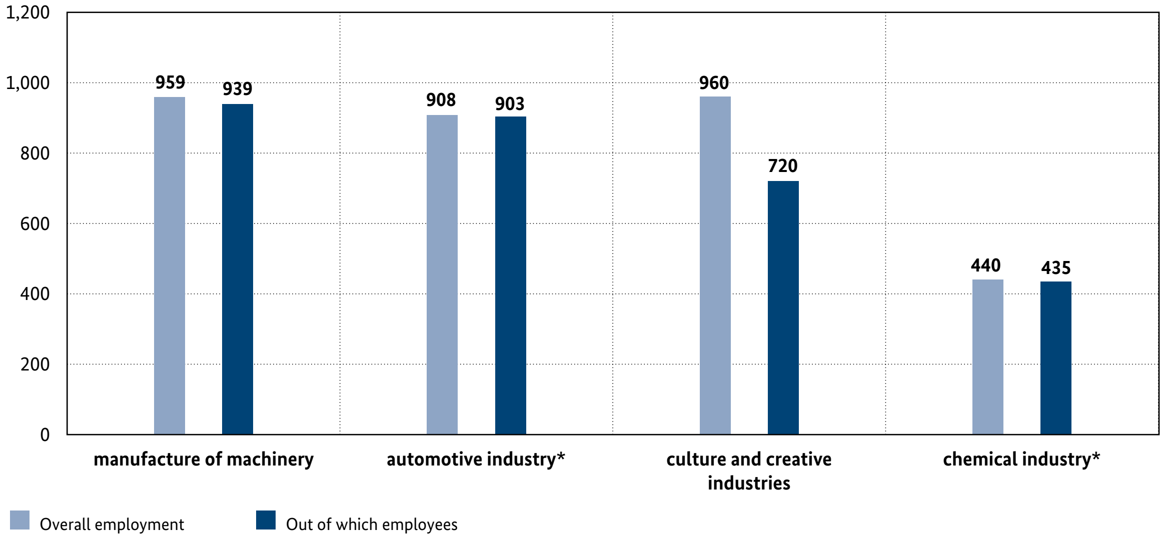
Major economic sectors such as manufacture of machinery, automotive industry or chemical industry are characterised by a high share of full-time jobs. Therefore we will only consider those employees in the culture and creative industries who work either full-time or part time (usually 19 hours per week or more).

Employment in the culture and creative industries amounts to about 720,000 employees, bringing it almost to a par with employment in the automotive industry with 770,000 employees. Different from earlier monitoring reports, employees working in 'other manufacturing of vehicles', amounting to a total of 133,000 employees, were added now to the number of employees in the automotive industries. The figure of 903,000 employees indicated in Figure 3 shows the total number of employees in the automotive industry including 'other manufacture of vehicles'.

Employment in the manufacturing of machinery, amounting to 939,000 employees, surpasses the level of the culture and creative industries by one quarter, whereas the chemical industry lies more than one quarter beneath the level of the culture and creative industries.

At 25 per cent the share of self-employed persons in the culture and creative industries is far higher than in all other branches. In the traditional economic sectors, this group is of little quantitative significance. 5,000 self-employed persons in the automotive industry (including other manufacture of vehicles) and about 5,000 in the chemical industry are just a fraction of the number of self-employed persons in the culture and creative industries, where their number amounts to 239,000 and brings their share in employment to an above-average level. Manufacture of machinery, with a little more than 20,000 self-employed persons, is the only sector where self-employment is of a certain quantitative relevance.

Figure 3: Persons employed in the culture and creative industries, compared across branches, 2010 (in thousands)



Note: Employed persons include self-employed persons according to turnover tax statistics (more than EUR 17,500 annual turnover) and employees liable to social insurance deductions (excluding marginally employed persons) according to employment data.

*Automotive industry including other manufacture of vehicles; *chemical industry including the pharmaceutical industry

Source: Turnover tax statistics, Destatis 2012; employment data, Federal Agency for Employment 2012, calculations by Michael Söndermann/ Office for Culture Industries Research

Major national and international companies in the traditional industrial branches provide employment for many thousands of people. Therefore the economic crisis of 2009 had particularly dire consequences for the people working there. According to the new statistical classification (WZ-2008) there were 813,000 employees working in the automotive industry in 2008. This figure had dwindled to 770,000 in 2010, meaning that the automotive industry lost more than 40,000 jobs over this period. According to the new classification (WZ 2008), the culture and creative industries also had to put up with the loss of jobs. About 11,000 employees liable to social insurance deductions lost their jobs in the culture and creative industries between 2008 and 2010. Nevertheless, the culture and creative industries lost much fewer jobs than the automotive industry.

The comparison of the culture and creative industries with other branches shows its great importance, but nonetheless this complex of branches is still struggling to achieve the acknowledgement it deserves.

3. Summary of Empirical Findings on the Culture and Creative Industries

Positive trend expected to persist

The economic development of the culture and creative industries was following the positive trend of the overall economy already in 2010. In 2011 the culture and creative industries grow again and almost double their growth rate. The turnover volume of the culture and creative industries grows by at least 4.4 per cent as compared to 2010.

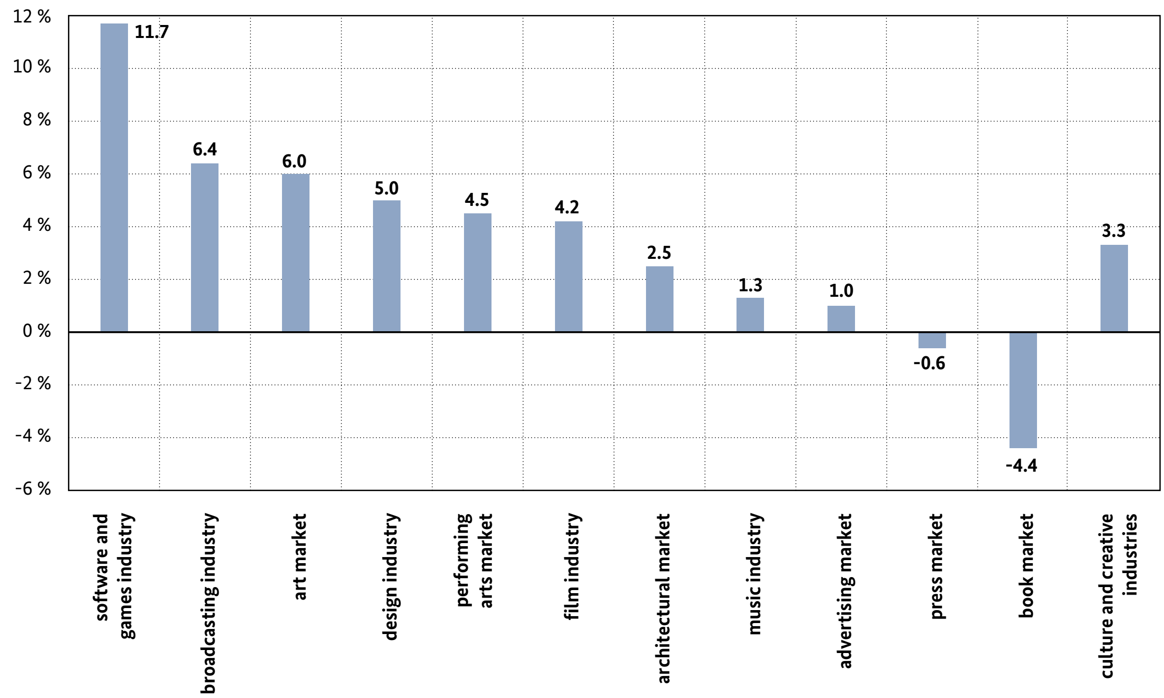
The average annual growth rate in the culture and creative industries for the period 2009 to 2011 amounts to 3.3 per cent, as shown in figure 4.

As in the previous years the software and games industry achieves a leading rank with an average annual turnover growth of 11.7 per cent. However, the growth dynamics of the culture and creative industries are not based on this market segment alone. The broadcasting industry (6.4 per cent), the art market (6.0 per cent) the design industry (5.0 per cent), the performing arts market and the film industry (about 4 per cent each) also attain above-average growth rates.

Other market segments with positive turnover growth rates between 2009 and 2011 include the architectural market (2.5 per cent), the music industry and the advertising market (about 1 per cent each).

The press and book markets are the only ones with a negative growth of turnover of -0.6 per cent and -4.4 per cent respectively.

Figure 4: Turnover development in the market segments of the culture and creative industries, 2009–2011
(Average change 2009–2011*, in per cent)



Note: *Basic data 2011 are estimates or temporary data

Source: Turnover tax statistics, Destatis 2012; calculations by Michael Söndermann/Office for Culture Industries Research

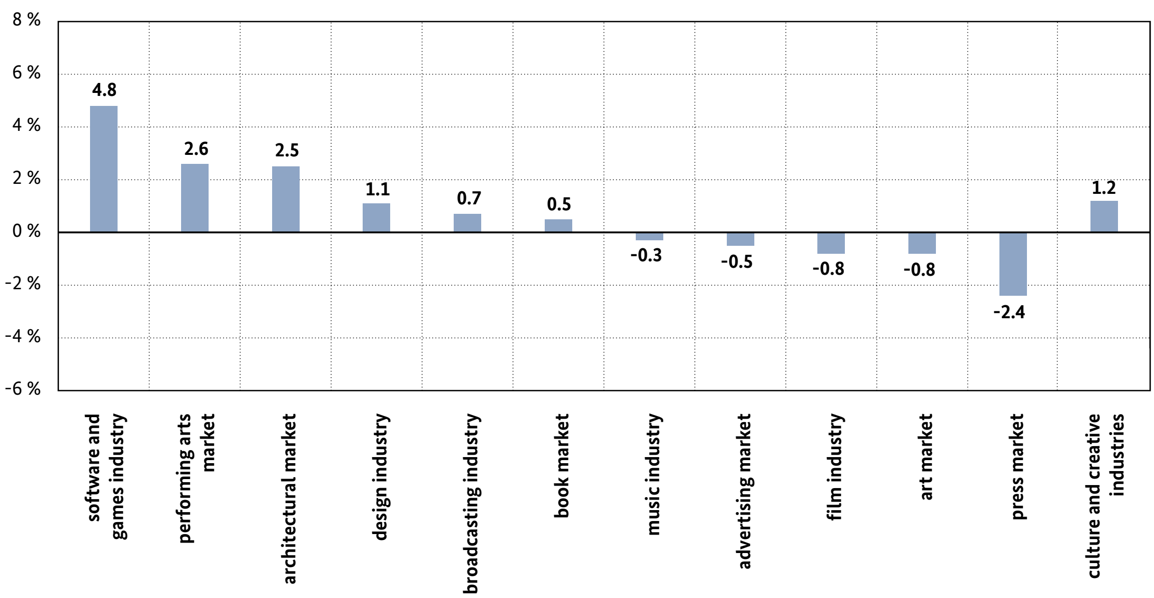
The four economically most powerful market segments in the culture and creative industries are the press market (31 billion Euros), the software and games industry (30 billion Euros), the advertising market (26 billion Euros) and the design industry (19 billion Euros). While the software and games industry and the design industry have been identified as important growth drivers, the advertising market has shown only a minimal growth rate. The press market, as the largest market segment of the culture and creative industries, is currently undergoing substantial decreases due to structural change processes.

Labour market recovering after the crisis

2011 is the first year to show positive growth in the employment market after the crisis year 2009. The average annual growth rate in the employment market amounts to 1.2 per cent between 2009 and 2001.

Six of the eleven market segments achieve average growth rates of 0.5 per cent to 4.8 per cent. The software and games industry is leading again with a growth rate of 4.8 per cent, followed by the performing arts market and the architectural market with growth rates of about 2.5 per cent each. The following ranks are occupied by the design industry (1.1 per cent) and the broadcasting industry (4.4 per cent). A small growth of 0.5 per cent in the book market comes as a surprise, as the book market had to put up with a significant economic upset caused by shrinking turnover figures of -4.4. per cent during the same period. The increase in employment is mainly due to the development in book trade. However, it must be assumed that this increase is caused by methodological amendments in the employment statistics rather than by real market effects.

Figure 5: Development of employment in the market segments of the culture and creative industries, 2009–2011
(Average change 2009–2011*, in per cent)



Note: *Basic data 2011 are estimates or temporary data

Source: Turnover tax statistics, Destatis 2012; employment data, Federal Agency for Employment; calculations by Michael Söndermann/Office for Culture Industries Research

The music industry, the advertising market, the film industry and the art market show negative trends with minimal average losses of 0.3 per cent to 0.8 per cent. The press market takes the last rank also in the employment market with an average of minus 2.4 per cent, as was to be expected due to its overall poor economic performance.

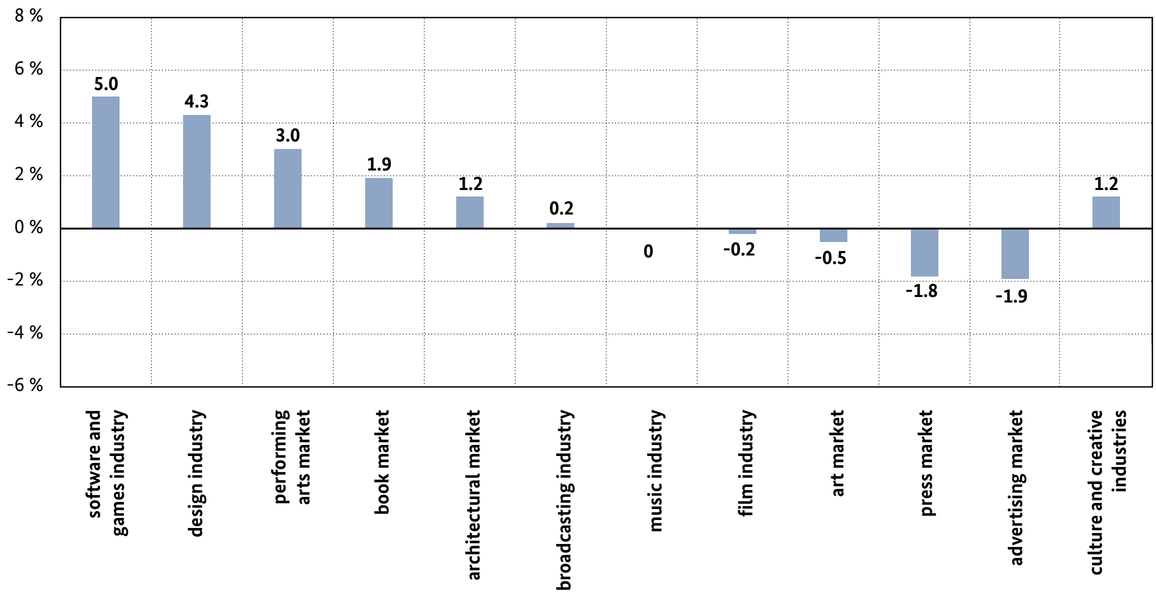
Number of enterprises growing once more

After shrinking numbers of enterprises in six of the eleven market segments in 2010, the trend has risen again in 2011. The average annual increase in the number of enterprises between 2009 and 2011 amounts to 1.2 per cent.

The software and games industry grows at an annual average rate of 5.0 per cent, followed by the design industry with 4.3 per cent and the performing arts market with 3.0 per cent. Software developers and programmers stand out within these growing markets, achieving two-digit growth rates in 2011. Similar impulses are registered in the design industry. The numbers of industrial and product designers, graphic and communication designers and interior architects rises by more than ten per cent per year. The numbers of self-employed artists continue rising in 2011, keeping up a trend that started already in 2010. The numbers of musicians, writers, translators, performing artists and journalists increase by 2 per cent on average.

Shrinking markets include mainly the press and advertising market with average annual decreases of almost 2 per cent each between 2009 and 2011. News agencies, publishers and press retail trade are especially hard hit. In 2011 alone, between 1 per cent and 7 per cent of all self-employed persons or enterprises disappear in these branches.

Figure 6: Development of enterprises in the market segments of the culture and creative industries, 2009–2011
(Average change 2009–2011* in per cent)



Note: *Basic data 2011 are estimates or temporary data.

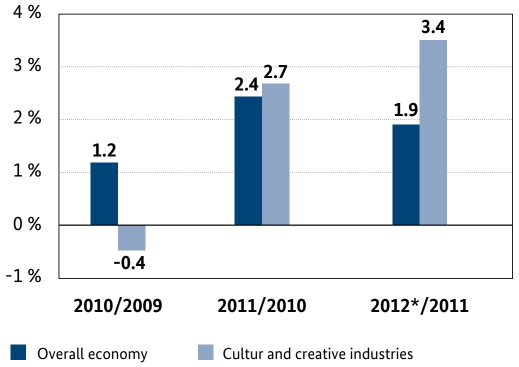
Source: Turnover tax statistics, Destatis 2012; employment data, Federal Agency for Employment; calculations by Michael Söndermann/Office for Culture Industries Research

Nevertheless there is an overall upward trend to be registered in 2011. Additional economic impulses for economic growth will be needed, however, in order to keep the number of self-employed persons growing in the years to come.

Trends for economic year 2012 again positive

The culture and creative industries have concluded the economic year 2011 on a positive note, making this the second year in a row with a prosperous development, and this trend will probably also be confirmed by the employment trends in 2012.

Figure 7: Development of employment in the culture and creative industries and in the overall economy
(Change against previous year in per cent)



Note: *Data culture and creative industries 2012 are estimates; employment = employees liable to social insurance deductions, excluding marginal employment

Source: Employment data, Federal Agency for Employment 2012; calculations by Michael Söndermann/Office for Culture Industries Research

According to the first employment data for 2012 of the Federal Agency for Employment Agency, the number of employees liable to social insurance deductions will grow by at least 3.4 per cent compared to 2011. The overall economy will achieve a growth rate of just a 1.9 per cent. Should these preliminary data be confirmed in spring 2013, the culture and creative industries will have grown at almost double the rate of the overall economy. Such dynamic growth of the culture and creative industries was last seen in the 1990ies.

A continuation of this trend would be an extraordinary signal from the culture and creative industries, indicating that the economic situation of enterprises in the culture and creative industries has further stabilised, as jobs liable to social insurance deductions are usually more cost-intensive than self-employed persons or consultants.

The market segments of design, architecture, advertising and software and games industry are expected to be the main drivers in employment creation in the culture and creative industries. They are at the same time essential markets with a great number of enterprises. As they are mainly service providers for other branches in manufacturing or trade, the further development of the culture and creative industries is strongly dependent on the overall economic development. After the strong increases of the gross domestic product[12] in 2010 (4.2 per cent) and 2011 (3.0 per cent) the Ministry of Economics and Technology expects a weaker growth of less than 1 per cent in 2012[13]. Following this still positive development the culture and creative industries may also expect a positive trend.

12 Data corrected for inflation.

13 German Federal Ministry of Economics and Technology, Press Release 11/12/2012: The Economic Situation in Germany in December 2012.

4. Outlook for the Culture and Creative Industries

Culture and creative industries are not only important for the generation of value added in Germany, the sector also provides models for future forms of work and life. It is part of a future knowledge- and content-oriented society. The culture and creative industries show important structural characteristics which can and will be introduced in other economic branches in the future.

- Employment and business models practised in the culture and creative industries today are future-oriented. Due to its mode of production, such as hybrid forms of employment and the mainly content-oriented production of many enterprises, the culture and creative industries are pioneers on the way towards a knowledge-based economy in Germany.

- Some sub-sectors of the culture and creative industries have very short innovation cycles for certain products. Innovation-oriented business models, classified as belonging to the high-risk area in corporate financing, need specific support. Economic policy aimed at support to their innovation potential needs specially tailored support tools.

- Prototypes, individual works, small scale series and immaterial products are typical products of the culture and creative industries. The mode of production and the characteristics of the products of the culture and creative industries are typical for a knowledge-based economy.

- A fast-changing employment structure and constantly changing fields of work and professional skills are important characteristics of the culture and creative industries. The culture and creative industries with their predominant employment structure can be a model for the development of the traditional branches, as for example self-employment and micro enterprises will play a more and more important role.

- Almost all enterprises in the culture and creative industries use modern technologies, especially information and communication technologies. They are not merely passive technology users, but also provide constant impulses for the producers and developers of new technologies.

Economic policy support to the culture and creative industries may develop trend-setting methods and instruments for economic support to be transferred to other economic branches as well.

In its new vision 'Europe 2020' the European Union aims at 'intelligent, sustainable and integrative' growth. Due to the economic importance and also due to the best practice character for future forms of work of the culture and creative industries, economic policy support to this sector, which contributes to its innovative and economic potential, can also contribute greatly to the achievement of this EU goal.

5. Annexes

5.1 Tables

Table 1: Key Data on Culture and Creative Industries in Germany 2009–2011

Category	2009	2010	2011*	Change in % 2011*/2010
Statistical core figures				
No. of enterprises[1] in thousands				
- Culture and creative industries (CCI)	238	240	244	*2.0 %*
- Share of CCI in overall economy	*7.6 %*	*7.6 %*	*7.5 %*	-
Turnover in billion €				
- Culture and creative industries (CCI)	134.3	137.3	143.4	*4.4 %*
- Share of CCI in overall economy	*2.7 %*	*2.6 %*	*2.6 %*	–
No. of employees (liable to social insurance deductions)[2] in thousands				
- Culture and creative industries (CCI)	723	720	740	*2.7 %*
- Share of CCI in overall economy	*2.6 %*	*2.6 %*	*2.6 %*	–
No. of persons employed[3] in thousands				
- Culture and creative industries (CCI)	962	960	984	*2.5 %*
- Share of CCI in overall economy	*3.2 %*	*3.1 %*	*3.1 %*	–
Statistical estimates				
No. of marginally self-employed[4] in thousands				
- Culture and creative industries (CCI)	194	209	225	*7.4 %*
- Share of CCI in overall economy	*18.0 %*	*19.1 %*	*19.9 %*	–
No. of marginally employees[5] in thousands				
- Culture and creative industries (CCI)	510	504.6	486.1	*-3.7 %*
- Share of CCI in overall economy	*7.1 %*	*6.9 %*	*4.0 %*	–
No. of marginally employed persons in thousands[6]				
- Culture and creative industries (CCI)	704	714	711	*-0.4 %*
- Share of CCI in overall economy	*6.2 %*	*6.2 %*	*6.0 %*	–
Statistical core figures and estimates				
No. of total persons employed[7] in thousands				
- Culture and creative industries (CCI)	1,666	1,674	1,695	*1.3 %*
- Share of CCI in overall economy	*4.3 %*	*4.3 %*	*4.3 %*	–
Gross value added[8]				
- Culture and creative industries (CCI) in billion €	61.5	61.4	62.7	*2.2 %*
- Share of CCI in GDP	*2.6 %*	*2.5 %*	*2.4 %*	–
- Gross Domestic Product (GDP) in billion €	2,375	2,496	2,593	*3.9 %*
Key data for culture and creative industries				
Turnover per enterprise in thousand €	563	573	587	*2.4 %*
Turnover per employee in thousand €	186	191	194	*1.7 %*
Turnover per person employed in thousand €	140	143	146	*1.8 %*

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Employees per enterprise	3.0	3.0	3.0	*0.7 %*
Persons employed per enterprise	4.0	4.0	4.0	*0.5 %*
Gross value added per person employed in thousand €	63.9	63.9	63.7	*-0.3 %*
Share of self-employed in persons employed in per cent	25	25	25	–

Note: *Preliminary data and estimates, employees liable to social insurance deductions and employed persons in 2011 preliminary data of the Federal Agency for Employment.

1 Taxable entrepreneurs with annual turnovers of EUR 17,500 and more.
2 Employees liable to social insurance deductions working full and part time, without marginally employed persons.
3 Employed persons include taxable entrepreneurs and employees liable to social insurance deductions.
4 In addition: marginally employed persons (free-lances, self employed persons with less than EUR 17,500 turnover per year), data based on Microcensus.
5 In addition: marginally employees persons based on Microcensus.
6 Employed persons include all self-employed and employed persons including marginally employed persons based on Microcensus data.
7 Total persons employed core figures and estimates.
8 Gross value added in 2010 based on national accounting data; minimum data only (national accounting data, updated October 2011, WZ-selection: 58-60, 73, 90-92, excluding 62, 71, 74), gross value added 2011 estimates.

Sources: Turnover tax statistics, Federal Statistical Office (Destatis) 2012; labour market statistics, Federal Agency for Employment 2012; calculations by Michael Söndermann/ Office for Culture Industries Research, Cologne

Table 2.1: Culture and Creative Industries in Germany
Enterprises according to market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Enterprises total 2009	Enterprises total 2010	Enterprises total 2011**
1. Music industry				
90.03.1	Own-account composers, musicians, arranging of music	2,656	2,643	2,696
90.01.2	Music and dance ensembles	1,828	1,661	1,578
59.20.1	Sound-recording studios and production of taped radio programming	479	539	548
59.20.2	Publishing of sound recordings	395	390	414
59.20.3	Publishing of printed music	1,200	1,149	1,096
90.04.1	Organisation of theatre performances and concerts*	1,414	1,400	1,415
90.04.2	Operation of private opera houses, concert halls etc.*	228	228	232
90.02	Support activities to performing arts*	2,024	2,109	2,224
47.59.3	Retail sale of musical instruments and scores	2,235	2,142	2,209
47.63	Retail sale of music and video recordings*	238	282	269
32.20	Manufacture of musical instruments	1,165	1,180	1,171
	Market segment total	**13,862**	**13,723**	**13,851**
2. Book market				
90.03.2	Own-account writers	6,616	6,941	7,149
74.30.1	Translation activities	1,584	1,625	1,717
58.11	Book publishing	2,193	2,220	2,275
47.61	Retail sale of books	4,290	4,195	4,279
47.79.2	Retail sale in second-hand bookstores	479	459	455
18.14	Binding and related services	1,070	1,041	985
	Market segment total	**16,232**	**16,481**	**16,859**

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Table 2.1: Culture and Creative Industries in Germany
Enterprises according to market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Enterprises total 2009	Enterprises total 2010	Enterprises total 2011**
3. Art market				
90.03.3	Own-account visual artists	8,883	8,814	8,902
47.78.3	Retail sale of art, pictures, craftwork, (estimate)**	1,797	1,712	1,746
91.02	Museum shops and art exhibitions (estimate)	890	823	823
47.79.1	Retail sale of antiques and antique rugs	2,193	2,115	2,162
	Market segment total	**13,763**	**13,464**	**13,634**
4. Film industry				
90.01.4	Own-account stage, motion picture, radio and television artists and other performing arts activities*	8,455	8,710	8,971
59.11	Motion picture, video and TV programme production activities	5,785	5,253	5,304
59.12	Motion picture, video, TV programme post-production activities	696	767	788
59.13	Motion picture, video and TV programme distribution activities	929	865	846
59.14	Motion picture projection activities	888	878	881
47.63	Retail sale of music and video recordings*	238	282	269
77.22	Renting of video tapes and disks	1,321	1,201	1,164
	Market segment total	**18,312**	**17,956**	**18,223**
5. Broadcasting industry				
90.03.5	Own-account journalists and press photographers*	17,500	17,401	17,575
60.10	Radio broadcasting	266	262	265
60.20	Television programming and broadcasting activities	87	88	92
	Market segment total	**17,853**	**17,751**	**17,932**
6. Performing arts market				
90.01.4	Own-account stage, motion picture, radio and television artists and other performing arts activities*	8,455	8,710	8,971
90.01.3	Own-account performers and circus groups	564	573	585
90.01.1	Activities of theatre ensembles	126	124	112
90.04.1	Organisation of theatre performances and concerts*	1,414	1,400	1,386
90.04.2	Operation of private theatre and concert halls etc.*	228	228	232
90.04.3	Operation of variety theatres and cabarets	196	178	177
90.02	Support activities to performing arts*	2,024	2,109	2,224
85.52	Cultural education (music, dance, visual art)	1,986	2,080	2,208
	Market segment total	**14,993**	**15,402**	**15,895**
7. Design industry				
74.10.1	Activities of industrial, product and fashion designers	1,606	2,164	2,388
74.10.2	Activities of graphic and communications designers	5,506	7,269	8,347
74.10.3	Activities of interior decorators	8,017	7,679	7,833
71.11.2	Consulting architectural activities in interior design*	2,675	3,185	3,504
73.11	Advertising agencies*	18,060	17,125	17,560
32.12	Manufacture of jewellery and related articles	3,777	3,706	3,891
74.20.1	Activities of photographers	8,691	8,983	9,047
	Market segment total	**48,332**	**50,111**	**52,570**

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Table 2.1: Culture and Creative Industries in Germany
Enterprises according to market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Enterprises total 2009	Enterprises total 2010	Enterprises total 2011**
8. Architectural market				
71.11.1	Consulting architectural activities in building construction	28,140	27,587	27,863
71.11.2	Consulting architectural activities in interior design*	2,675	3,185	3,504
71.11.3	Consulting architectural activities in town, regional planning	4,664	4,828	5,000
71.11.4	Consulting architectural activities in landscape architecture	3,072	3,088	3,121
90.03.4	Own-account restorers	1,405	1,471	1,468
	Market segment total	**39,956**	**40,159**	**40,956**
9. Press market				
90.03.5	Own-account journalists and press photographers*	17,500	17,401	17,575
63.91	News agency activities	995	989	979
58.12	Publishing of directories and mailing lists	211	200	190
58.13	Publishing of newspapers	831	829	796
58.14	Publishing of journals and periodicals	1,848	1,782	1,711
58.19	Other publishing activities (excl. Software)	3,396	3,144	2,924
47.62	Retail sale of newspapers and stationery in specialised stores	9,536	9,219	8,942
	Market segment total	**34,317**	**33,564**	**33,117**
10. Advertising market				
73.11	Advertising agencies*	36,120	34,250	34,593
73.12	Media representation	962	1,080	1,091
	Market segment total	**37,082**	**35,330**	**35,683**
11. Software/games industry				
58.21	Publishing of computer games	392	354	336
58.29	Other software publishing	354	474	498
63.12	Web portals	190	271	360
62.01.1	Web-page design and programming	7,457	8,256	8,669
62.01.9	Other software development	18,625	19,172	19,939
	Market segment total	**27,018**	**28,527**	**29,802**
12. Other activities				
91.01	Library and archives activities	111	100	90
91.03	Operation of historical sites and buildings and similar visitor attractions	104	95	86
91.04	Botanical and zoological gardens and nature reserves activities	262	265	268
74.30.2	Interpretation activities	6,006	6,237	6,299
74.20.2	Activities of photographic laboratories	518	466	419
32.11+13	Striking of coins and related articles	352	343	360
	Market segment total	**7,353**	**7,506**	**7,523**
	Culture and Creative Industries with double counting	289,073	289,974	296,045
	Double sub-classes	50,594	50,440	51,720
Culture and Creative Industries (nos. 1.–12.) (no double counting)		**238,479**	**239,534**	**244,325**
Share in Overall Economy		*7.6 %*	*7.6 %*	*7.5 %*

Note: * Classes or sub-classes included in several market segments; ** Estimates or preliminary figures; estimates for 2011 based on rates of previous years, short-term economic statistics 2012 and employment statistics 2012; differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Federal Statistical Office (Destatis) 2012; calculations by Michael Söndermann/ Office for Culture Industries Research, Cologne

Table 2.2: Culture and Creative Industries in Germany; Turnovers by market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Turnover in million € 2009	Turnover in million € 2010	Turnover in million € 2011**
1. Music industry				
90.03.1	Own-account composers, musicians, arranging of music	261	261	268
90.01.2	Music and dance ensembles	225	210	195
59.20.1	Sound-recording studios and production of taped radio programming	93	109	114
59.20.2	Publishing of sound recordings	1,215	989	1,032
59.20.3	Publishing of printed music	587	549	572
90.04.1	Organisation of theatre performances and concerts*	1,437	1,509	1,584
90.04.2	Operation of private opera houses, concert halls and similar facilities*	361	389	396
90.02	Support activities to performing arts*	379	402	423
47.59.3	Retail sale of musical instruments and scores	1,105	1,175	1,173
47.63	Retail sale of music and video recordings*	113	126	127
32.20	Manufacture of musical instruments	532	551	586
	Market segment total	**6,307**	**6,270**	**6,472**
2. Book market				
90.03.2	Own-account writers	522	552	585
74.30.1	Translation activities	271	274	288
58.11	Book publishing	9,590	8,848	8,512
47.61	Retail sale of books	3,667	3,600	3,528
47.79.2	Retail sale in second-hand bookstores	66	72	76
18.14	Binding and related services	732	836	586
	Market segment total	**14,848**	**14,182**	**13,574**
3. Art market				
90.03.3	Own-account visual artists	730	750	772
47.78.3	Retail sale of art, pictures, craftwork, (estimate)**	594	660	761
91.02	Museum shops and art exhibitions (estimate)	412	518	518
47.79.1	Retail sale of antiques and antique rugs	409	404	358
	Market segment total	**2,146**	**2,332**	**2,410**
4. Film industry				
90.01.4	Own-account stage, motion picture, radio and television artists and other performing arts activities*	720	752	783
59.11	Motion picture, video and TV programme production activities	4,447	4,489	4,798
59.12	Motion picture, video, TV programme post-production activities	124	153	163
59.13	Motion picture, video and TV programme distribution activities	1,667	1,815	1,940
59.14	Motion picture projection activities	1,315	1,276	1,364
47.63	Retail sale of music and video recordings*	113	126	127
77.22	Renting of video tapes and disks	348	315	305
	Market segment total	**8,734**	**8,925**	**9,481**

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Table 2.2: Culture and Creative Industries in Germany; Turnovers by market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Turnover in million € 2009	Turnover in million € 2010	Turnover in million € 2011**
5. Broadcasting industry				
90.03.5	Own-account journalists and press photographers*	1,208	1,219	1,231
60.10	Radio broadcasting	1,004	965	971
60.20	Television programming and broadcasting activities	5,233	5,487	6,223
	Market segment total	**7,445**	**7,671**	**8,425**
6. Performing arts market				
90.01.4	Own-account stage, motion picture, radio and television artists and other performing arts activities*	720	752	783
90.01.3	Own-account performers and circus groups	51	55	56
90.01.1	Activities of theatre ensembles	53	54	48
90.04.1	Organisation of theatre performances and concerts*	1,437	1,509	1,584
90.04.2	Operation of private theatre and concert halls etc.*	361	389	396
90.04.3	Operation of variety theatres and cabarets	81	78	77
90.02	Support activities to performing arts*	379	402	423
85.52	Cultural education (music, dance, visual art)	235	239	254
	Market segment total	**3,316**	**3,478**	**3,622**
7. Design industry				
74.10.1	Activities of industrial, product and fashion designers	237	327	369
74.10.2	Activities of graphics and communications designers	495	627	707
74.10.3	Activities of interior decorators	1,012	981	1,107
71.11.2	Consulting architectural activities in interior design*	401	485	528
73.11	Advertising agencies*	12,132	12,112	12,257
32.12	Manufacture of jewellery and related articles	2,216	2,531	3,182
74.20.1	Activities of photographers	1,102	1,179	1,238
	Market segment total	**17,595**	**18,243**	**19,388**
8. Architectural market				
71.11.1	Consulting architectural activities in building construction	5,821	5,765	6,008
71.11.2	Consulting architectural activities in interior design*	401	485	528
71.11.3	Consulting architectural activities in town, regional planning	1,022	1,066	1,104
71.11.4	Consulting architectural activities in landscape architecture	571	543	549
90.03.4	Own-account restorers	151	171	176
	Market segment total	**7,967**	**8,031**	**8,365**
9. Press market				
90.03.5	Own-account journalists and press photographers*	1,208	1,219	1,231
63.91	News agency activities	516	513	548
58.12	Publishing of directories and mailing lists	1,369	1,415	1,362
58.13	Publishing of newspapers	10,930	11,183	10,847
58.14	Publishing of journals and periodicals	9,918	9,933	9,933
58.19	Other publishing activities	3,996	3,785	3,641
47.62	Retail sale of newspapers and stationery in specialised stores	3,403	3,351	3,374
	Market segment total	**31,341**	**31,398**	**30,936**

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Table 2.2: Culture and Creative Industries in Germany; Turnovers by market segments and classes/sub-classes 2009–2011

Market segment WZ-2008	Classes or sub-classes	Turnover in million € 2009	Turnover in million € 2010	Turnover in million € 2011**
10. Advertising market				
73.11	Advertising agencies*	24,264	24,223	24,514
73.12	Media representation	1,244	1,491	1,509
	Market segment total	**25,508**	**25,714**	**26,023**
11. Software/games industry				
58.21	Publishing of computer games	4,135	3,040	2,809
58.29	Other software publishing	272	429	396
63.12	Web portals	324	477	526
62.01.1	Web-page design and programming	2,530	2,732	3,224
62.01.9	Other software development	17,034	19,818	23,385
	Market segment total	**24,296**	**26,496**	**30,339**
12. Other activities				
91.01	Library and archives activities	63	66	68
91.03	Operation of historical sites and buildings and similar visitor attractions	39	32	35
91.04	Botanical and zoological gardens and nature reserves activities	244	267	279
74.30.2	Interpretation activities	428	462	486
74.20.2	Activities of photographic laboratories	567	518	518
32.11+13	Striking of coins and related articles	238	243	283
	Market segment total	**1,579**	**1,588**	**1,669**
	Culture and Creative Industries with double counting	151,081	154,327	160,704
	Double sub-classes	16,751	16,993	17,329
Culture and Creative Industries (nos. 1.–12.) (no double counting)		**134,330**	**137,333**	**143,375**
Share in Overall Economy		*2.7 %*	*2.6 %*	*2.6 %*

Note: * Classes or sub-classes included in several market segments; ** Estimates or preliminary figures; estimates for 2011 based on rates of previous years, short-term economic statistics 2012 and employment statistics 2012; differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Federal Statistical Office (Destatis) 2012; calculations by Michael Söndermann/ Office for Culture Industries Research, Cologne

Table 2.3: Culture and Creative Industries in Germany
Persons employed according to market segments and classes/sub-class 2009–2011

Market segment WZ-2008	Classes and sub-classes	Persons employed total 2009	Persons employed total 2010	Persons employed total 2011**
1. Music industry				
90.03.1	Own-account composers, musicians, arranging of music	2,839	2,818	2,876
90.01.2	Music and dance ensembles	7,352	6,869	6,291
59.20.1	Sound-recording studios and production of taped radio programming	1,392	1,408	1,431
59.20.2	Publishing of sound recordings	2,680	2,543	2,701
59.20.3	Publishing of printed music	2,937	3,202	3,055
90.04.1	Organisation of theatre performances and concerts*	6,388	6,392	6,459
90.04.2	Operation of private opera houses, concert halls and similar facilities*	3,499	3,546	3,609
90.02	Support activities to performing arts*	5,543	5,824	6,141
47.59.3	Retail sale of musical instruments and scores	6,127	6,168	6,361
47.63	Retail sale of music and video recordings*	1,647	1,678	1,599
32.20	Manufacture of musical instruments	6,632	6,323	6,276
	Market segment total	**47,036**	**46,771**	**46,798**
2. Book market				
90.03.2	Own-account writers	6,967	7,296	7,522
74.30.1	Translation activities	4,704	4,711	4,977
58.11	Book publishing	26,017	24,951	25,565
47.61	Retail sale of books	28,822	28,264	30,495
47.79.2	Retail sale in second-hand bookstores	817	780	773
18.14	Binding and related services	12,052	11,403	10,792
	Market segment total	**79,379**	**77,405**	**80,123**
3. Art market				
90.03.3	Own-account visual artists	10,214	10,158	10,226
47.78.3	Retail sale of art, pictures, craftwork, (estimate)**	3,609	3,599	3,416
91.02	Museum shops and art exhibitions (estimate)	2,100	2,029	2,029
47.79.1	Retail sale of antiques and antique rugs	3,592	3,457	3,534
	Market segment total	**19,515**	**19,243**	**19,206**
4. Film industry				
90.01.4	Own-account stage, motion picture, radio and TV artists and other performing arts activities*	8,988	9,268	9,512
59.11	Motion picture, video and TV programme production activities	28,571	27,783	28,054
59.12	Motion picture, video, TV programme post-production activities	5,951	5,708	5,863
59.13	Motion picture, video and TV programme distribution activities	3,439	3,316	3,243
59.14	Motion picture projection activities	9,174	8,961	8,993
47.63	Retail sale of music and video recordings*	1,647	1,678	1,599
77.22	Renting of video tapes and disks	3,983	3,678	3,564
	Market segment total	**61,753**	**60,392**	**60,828**

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Table 2.3: Culture and Creative Industries in Germany
Persons employed according to market segments and classes/sub-class 2009–2011

Market segment WZ-2008	Classes and sub-classes	Persons employed total 2009	Persons employed total 2010	Persons employed total 2011**
5. Broadcasting industry				
90.03.5	Own-account journalists and press photographers*	18,455	18,273	18,439
60.10	Radio broadcasting	13,776	13,782	13,947
60.20	Television programming and broadcasting activities	7,307	7,388	7,705
	Market segment total	**39,537**	**39,444**	**40,092**
6. Performing arts market				
90.01.4	Own-account stage, motion picture, radio and television artists and other performing arts activities*	8,988	9,268	9,512
90.01.3	Own-account performers and circus groups	1,294	1,283	1,310
90.01.1	Activities of theatre ensembles	1,243	1,331	1,201
90.04.1	Organisation of theatre performances and concerts*	6,388	6,392	6,430
90.04.2	Operation of private theatre and concert halls etc.	3,499	3,546	3,609
90.04.3	Operation of variety theatres and cabarets	932	943	936
90.02	Support activities to performing arts*	5,543	5,824	6,141
85.52	Cultural education (music, dance, visual art)	4,529	4,695	4,984
	Market segment total	**32,416**	**33,282**	**34,122**
7. Design industry				
74.10.1	Activities of industrial, product and fashion designers	3,341	4,248	4,688
74.10.2	Activities of graphics and communications designers	8,360	10,356	11,892
74.10.3	Activities of interior decorators	10,599	10,476	10,757
71.11.2	Consulting architectural activities in interior design*	4,154	4,754	5,341
73.11	Advertising agencies*	67,623	65,084	66,738
32.12	Manufacture of jewellery and related articles	14,858	13,849	11,906
74.20.1	Activities of photographers	17,166	17,518	17,643
	Market segment total	**126,101**	**126,285**	**128,965**
8. Architectural market				
71.11.1	Consulting architectural activities in building construction	74,905	75,523	77,813
71.11.2	Consulting architectural activities in interior design*	4,154	4,754	5,341
71.11.3	Consulting architectural activities in town, regional planning	11,405	11,653	12,068
71.11.4	Consulting architectural activities in landscape architecture	7,056	7,338	7,417
90.03.4	Own-account restorers	2,905	2,945	2,939
	Market segment total	**100,425**	**102,213**	**105,578**
9. Press market				
90.03.5	Own-account journalists and press photographers*	18,455	18,273	18,439
63.91	News agency activities	9,131	8,917	9,459
58.12	Publishing of directories and mailing lists	5,102	5,071	4,332
58.13	Publishing of newspapers	52,485	50,322	48,358
58.14	Publishing of journals and periodicals	43,704	41,483	40,805
58.19	Other publishing activities	11,619	11,319	11,489
47.62	Retail sale of newspapers and stationery in specialised stores	29,345	29,230	29,021
	Market segment total	**169,841**	**164,615**	**161,903**

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Table 2.3: Culture and Creative Industries in Germany
Persons employed according to market segments and classes/sub-class 2009–2011

Market segment WZ-2008	Classes and sub-classes	Persons employed total 2009	Persons employed total 2010	Persons employed total 2011**
10. Advertising market				
73.11	Advertising agencies*	135,245	130,168	132,948
73.12	Media representation	6,832	7,532	7,746
	Market segment total	**142,077**	**137,700**	**140,693**
11. Software/games industry				
58.21	Publishing of computer games	1,194	1,520	1,838
58.29	Other software publishing	12,527	15,413	17,916
63.12	Web portals	2,309	3,578	5,195
62.01.1	Web-page design and programming	25,588	29,573	34,296
62.01.9	Other software development	202,997	202,298	209,438
	Market segment total	**244,615**	**252,382**	**268,683**
12. Other activities				
91.01	Library and archives activities	1,032	995	982
91.03	Operation of historical sites and buildings and similar visitor attractions	221	210	214
91.04	Botanical and zoological gardens and nature reserves activities	773	775	800
74.30.2	Interpretation activities	6,421	6,651	6,776
74.20.2	Activities of photographic laboratories	5,622	5,070	4,833
32.11+13	Striking of coins and related articles	1,301	1,323	1,377
	Market segment total	**15,370**	**15,023**	**14,983**
	Culture and Creative Industries with double counting	1,078,065	1,074,755	1,101,974
	Double sub-classes	116,297	114,819	117,807
Culture and Creative Industries (nos. 1.–12.) (no double counting)		**961,768**	**959,936**	**984,166**
Share in Overall Economy		*3.2 %*	*3.1 %*	*3.1 %*

Note: * Classes or sub-classes included in several market segments; ** Estimates or preliminary figures;
estimates for 2011 based on rates of previous years, short-term economic statistics 2012 and employment statistics 2012; differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Federal Statistical Office (Destatis) 2012; labour market statistics, Federal Agency for Employment 2012;
calculations by Michael Söndermann/ Office for Culture Industries Research, Cologne

5.2 Statistical Classification of Culture and Creative Industries in Germany

Definition Model for Monitoring Report on Culture and Creative Industries 2011 according to new WZ-2008

Market segment WZ-2008	Classes or sub-classes	Share in % Turnover tax	Share in % Turnover tax
1. Music industry			
90.03.1	Own-account composers, musicians, arranging of music		
90.01.2	Music and dance ensembles		
59.20.1	Sound-recording studios and production of taped radio programming		
59.20.2	Publishing of sound recordings		
59.20.3	Publishing of printed music		
90.04.1	Organisation of theatre performances and concerts*		
90.04.2	Operation of private opera houses, concert halls and similar facilities*		10 %
90.02	Support activities to performing arts*		
47.59.3	Retail sale of musical instruments and scores		
47.63	Retail sale of music and video recordings*		
32.20	Manufacture of musical instruments		
2. Book market			
90.03.2	Own-account writers		
74.30.1	Translation activities		
58.11	Book publishing		
47.61	Retail sale of books		
47.79.2	Retail sale in second-hand bookstores		
18.14	Binding and related services		
3. Art market			
90.03.3	Own-account visual artists		
47.78.3	Retail sale of art. pictures. craftwork. (estimate)**	20 %	20 %
91.02	Museum shops and art exhibitions (estimate)		8 %
47.79.1	Retail sale of antiques and antique rugs		
4. Film industry			
90.01.4	Own-account stage. motion picture. radio and TV artists and other performing arts activities*		
59.11	Motion picture. video and TV programme production activities		
59.12	Motion picture. video. TV programme post-production activities		
59.13	Motion picture. video and TV programme distribution activities		
59.14	Motion picture projection activities		
47.63	Retail sale of music and video recordings*		
77.22	Renting of video tapes and disks		
5. Broadcasting industry			
90.03.5	Own-account journalists and press photographers*		
60.10	Radio broadcasting		40 %
60.20	Television programming and broadcasting activities		40 %

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Definition Model for Monitoring Report on Culture and Creative Industries 2011 according to new WZ-2008

Market segment WZ-2008	Classes or sub-classes	Share in % Turnover tax	Share in % Turnover tax
6. Performing arts market			
90.01.4	Own-account stage. motion picture. radio and television artists and other performing arts activities*		
90.01.3	Own-account performers and circus groups		
90.01.1	Activities of theatre ensembles		10 %
90.04.1	Organisation of theatre performances and concerts*		
90.04.2	Operation of private theatre and concert halls etc.*		10 %
90.04.3	Operation of variety theatres and cabarets		
90.02	Support activities to performing arts*		
85.52	Cultural education (music. dance. visual art)		
7. Design industry			
74.10.1	Activities of industrial, product and fashion designers		
74.10.2	Activities of graphics and communications designers		
74.10.3	Activities of interior decorators		
71.11.2	Consulting architectural activities in interior design*		
73.11	Advertising agencies*	50 %	50 %
32.12	Manufacture of jewellery and related articles		
74.20.1	Activities of photographers		
8. Architectural market			
71.11.1	Consulting architectural activities in building construction		
71.11.2	Consulting architectural activities in interior design*		
71.11.3	Consulting architectural activities in town. regional planning		
71.11.4	Consulting architectural activities in landscape architecture		
90.03.4	Own-account restorers		
9. Press market			
90.03.5	Own-account journalists and press photographers*		
63.91	News agency activities		
58.12	Publishing of directories and mailing lists		
58.13	Publishing of newspapers		
58.14	Publishing of journals and periodicals		
58.19	Other publishing activities		
47.62	Retail sale of newspapers and stationery in specialised stores		
10. Advertising market			
73.11	Advertising agencies*		
73.12	Media representation		
11. Software/games industry			
58.21	Publishing of computer games		
63.12	Other software publishing		
62.01.1	Web portals		
62.01.9	Web-page design and programming		
58.29	Other software development		

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Definition Model for Monitoring Report on Culture and Creative Industries 2011 according to new WZ-2008

Market segment WZ-2008	Classes or sub-classes	Share in % Turnover tax	Share in % Turnover tax
12. Other activities			
91.01	Library and archives activities		8 %
91.03	Operation of historical sites and buildings and similar visitor attractions		8 %
91.04	Botanical and zoological gardens and nature reserves activities		8 %
74.30.2	Interpretation activities		
74.20.2	Activities of photographic laboratories		
32.11+13	Striking of coins and related articles		
Culture and Creative Industries with double counting			
Double sub-classes			
Culture and Creative Industries (nos. 1.–12.) (no double counting)			

Note: * Classes or sub-classes included in several market segments;

Source: Classification of Economic Activities (WZ 2008), Federal Statistical Office (Destatis) 2012;
Arbeitskreis Kulturstatistik e.V. / Germany (German Working Group on Cultural Statistics)

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