This brochure is published as part of the public relations work of the Federal Ministry for Economic Affairs and Energy. It is distributed free of charge and is not intended for sale. The distribution of this brochure at campaign events or at information stands run by political parties is prohibited, and political party-related information or advertising shall not be inserted in, printed on, or affixed to this publication.
# Table of Contents

1. **Introduction** ................................................. 2  
   1.1 Commission .................................................. 2  
   1.2 Definition ................................................... 2  

2. **Overview of the Overall Economic Importance of the Culture and Creative Industries** ................................................. 4  
   2.1 Key Data on the Culture and Creative Industries in Germany ......................................................... 4  
   2.2 Contribution of the Culture and Creative Industries towards Value Added ......................................................... 6  
   2.3 Employment in the Culture and Creative Industries ......................................................... 7  

3. **An Activity-based Analysis of Jobs in Germany’s Culture and Creative Industries** ............................................... 8  

4. **Cooperation in the Culture and Creative Industries** ......................................................... 10  

5. **Summary** ......................................................... 12  

6. **Annex** ......................................................... 18  
   6.1 Detailed Tables ................................................ 18  
   6.2 Bibliography .................................................. 30
1. Introduction

1.1 Commission

The Federal Ministry for Economic Affairs and Energy commissioned the Centre for European Economic Research (ZEW) in Mannheim and the Fraunhofer Institute for Systems and Innovation Research ISI in Karlsruhe to conduct regular audits of the culture and creative industries in Germany. The 2013 monitoring report builds upon the audits carried out over the past few years. It evaluates the importance of the culture and creative industries for the overall economy and looks at the development of its economic indicators between 2009 and 2013. The analyses contained in the report are based on data from the Federal Statistical Office (Destatis) and the Federal Employment Agency. The audits focus on the following key aspects:

- What is the economic importance of the culture and creative industries for the overall economy, and how do they compare to other traditional sectors in Germany?
- What are the key features of the individual submarkets in these industries?
- How have the culture and creative industries and their submarkets developed over the last few years in terms of core indicators (turnover, value added, number of companies, employment) and export activities?
- What factors influence the growth of young culture and creative enterprises?
- How important is cooperation for companies in the culture and creative industries and their submarkets? What do the companies aim to achieve by cooperating with others? What makes cooperation successful? What hinders it?

This year’s monitoring report also contains a number of specific elements:

- An activity-based analysis of jobs in the culture and creative industries.
- An analysis of the factors that influence growth in culture and creative start-ups.
- A closer examination of the significance of cooperation. To this end, a representative nationwide survey of companies and self-employed persons working in the culture and creative industries was carried out, along with a number of case studies in selected submarkets.

1.2 Definition

The definition of the culture and creative industries underlying this report follows that of the Conference of Economics Ministers, which places the focus on commercial companies: “The culture and creative industries comprise all cultural and creative enterprises that are mainly market-oriented and deal with the creation, production and/or dissemination through the media of cultural/creative goods and services. The main criterion for the definition is the commercial character of the company. All market-based companies which are subject to VAT or which simply desire to profit from art, culture and creativity, belong to this group of companies. Companies not included in this group are institutions or other types of associations, which are largely not financed by the market, but instead receive funds from public financing, licence fees or are supported by non-profit funds or private investors. Such a distinction between commercial or market-based companies on the one hand and non-market based companies on the other is of particular importance for the situation in Germany for reasons concerning policies of regulation and governance.”

2 Some of these are only covered in the unabridged version of the monitoring report.
3 Only in the unabridged version.
4 Wirtschaftsministerkonferenz (2009), Leitfaden zur Erstellung einer statistischen Datengrundlage für die Kulturwirtschaft und eine länderübergreifende Auswertung kulturwirtschaftlicher Daten (available in German only).
Figure 1.1: The submarkets of the culture and creative industries

2. Overview of the Overall Economic Importance of the Culture and Creative Industries

2.1 Key Data on the Culture and Creative Industries in Germany

The following analyses are based on the official statistics from the Federal Statistical Office of Germany and the Federal Employment Agency. The various data sources and calculation methods are explained in more detail in the annex to the unabridged version of the report.

Around 249,000 companies generated a turnover of EUR 145 billion

In 2013, the culture and creative industries comprised an estimated approximately 249,000 companies with a collective turnover of EUR 145 billion (see Table 2.1). These companies accounted for 7.56% of all enterprises and 2.36% of total turnover. In 2013 this branch of the economy employed around 791,000 people, representing 2.67% of all employees liable to social insurance contributions. In addition, approximately 249,000 self-employed persons worked in these industries. In other words, around 1,039,000 persons earned their main income in the culture and creative industries in 2013. Taking into additional account the 352,000 marginal employees and 201,000 marginally self-employed persons (self-employed persons and freelancers with an annual turnover of under EUR 17,500), then the entire number of persons employed in this sector in 2013 was around 1.59 million. The culture and creative industries contributed EUR 65.3 billion and therefore 2.32% to total gross value added.

Strong increase in jobs liable to social insurance contributions – Slight rise in turnover year on year

The key indicators of the culture and creative industries again developed positively in 2013 in relation to the previous year. The number of companies rose 1.18% over the prior year, turnover increased 1.36% and gross value added went up 2.55%. In other words, the positive trend that has been observable since the “crisis year” 2009 largely continued.

EUR 140,000 in average annual turnover per employed person

Structurally, the culture and creative industries are dominated by a large number of small and micro enterprises. In 2013 the average company employed four people, three of whom were liable to social insurance contributions. Accordingly, average turnover per company in 2013 remained comparatively low at EUR 584,000. Consequently, each employed person generated an average of EUR 140,000 in turnover in the culture and creative industries and contributed close to EUR 63,000 in gross value added. On average, each of the 791,000 employees liable to social insurance contributions generated a turnover of EUR 184,000. The percentage of self-employed persons in the culture and creative industries remained stable at 24%.
### Table 2.1: Key indicators of the culture and creative industries in Germany from 2009 to 2013*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>**Number of businesses ('000)**1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>238.5</td>
<td>239.5</td>
<td>244.3</td>
<td>245.8</td>
<td>248.7</td>
<td>1.18%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>7.61%</td>
<td>7.5%</td>
<td>7.60%</td>
<td>7.56%</td>
<td>7.56%</td>
<td></td>
</tr>
<tr>
<td><strong>Turnover (in EUR bn)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>134.3</td>
<td>137.3</td>
<td>141.0</td>
<td>143.3</td>
<td>145.3</td>
<td>1.36%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>2.74%</td>
<td>2.62%</td>
<td>2.48%</td>
<td>2.49%</td>
<td>2.36%</td>
<td></td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>**No. of employed persons ('000)**2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>952.9</td>
<td>952.4</td>
<td>976.6</td>
<td>1,011.5</td>
<td>1,038.6</td>
<td>2.67%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>3.10%</td>
<td>3.06%</td>
<td>3.07%</td>
<td>3.11%</td>
<td>3.16%</td>
<td></td>
</tr>
<tr>
<td>Employees liable to social insurance contributions ('000')1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>714.5</td>
<td>712.8</td>
<td>732.3</td>
<td>765.7</td>
<td>790.7</td>
<td>3.27%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>2.59%</td>
<td>2.55%</td>
<td>2.56%</td>
<td>2.62%</td>
<td>2.67%</td>
<td></td>
</tr>
<tr>
<td>**Self-employed persons ('000)**4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>238.5</td>
<td>239.5</td>
<td>244.3</td>
<td>245.8</td>
<td>248.7</td>
<td>1.18%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>7.61%</td>
<td>7.57%</td>
<td>7.60%</td>
<td>7.56%</td>
<td>7.56%</td>
<td></td>
</tr>
<tr>
<td>**Marginally employed persons ('000')5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>573.9</td>
<td>592.9</td>
<td>593.2</td>
<td>586.9</td>
<td>553.4</td>
<td>-5.71%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>6.80%</td>
<td>6.94%</td>
<td>6.80%</td>
<td>6.78%</td>
<td>6.39%</td>
<td></td>
</tr>
<tr>
<td>**Marginally self-employed persons ('000')6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>197.1</td>
<td>214.0</td>
<td>224.8</td>
<td>221.9</td>
<td>200.9</td>
<td>-9.44%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>18.26%</td>
<td>19.57%</td>
<td>18.90%</td>
<td>20.84%</td>
<td>21.17%</td>
<td></td>
</tr>
<tr>
<td>**Marginal employees ('000')7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>376.8</td>
<td>378.9</td>
<td>368.4</td>
<td>365.0</td>
<td>352.4</td>
<td>-3.45%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>5.12%</td>
<td>5.09%</td>
<td>4.89%</td>
<td>4.81%</td>
<td>4.57%</td>
<td></td>
</tr>
<tr>
<td>**Total no. of employed persons ('000')8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>1,526.8</td>
<td>1,545.3</td>
<td>1,569.9</td>
<td>1,598.4</td>
<td>1,592.0</td>
<td>-0.40%</td>
</tr>
<tr>
<td>Contribution of CCIs</td>
<td>3.90%</td>
<td>3.89%</td>
<td>3.87%</td>
<td>3.88%</td>
<td>3.83%</td>
<td></td>
</tr>
<tr>
<td>**Gross value added (in EUR bn)**9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Culture and creative industries (CCIs)</td>
<td>58.1</td>
<td>59.7</td>
<td>61.3</td>
<td>63.6</td>
<td>65.3</td>
<td>2.55%</td>
</tr>
<tr>
<td>Contribution of CCIs to GDP</td>
<td>2.36%</td>
<td>2.32%</td>
<td>2.27%</td>
<td>2.31%</td>
<td>2.32%</td>
<td></td>
</tr>
<tr>
<td>GDP</td>
<td>2,456.7</td>
<td>2,576.2</td>
<td>2,699.1</td>
<td>2,749.9</td>
<td>2,809.5</td>
<td>2.17%</td>
</tr>
</tbody>
</table>

* Data for 2013 based partly on own estimations and preliminary official figures. Estimates based on developments in previous years, economic statistics for the service sector for 2013, and employment statistics for 2013.

1 Taxable business owners with at least EUR 17,500 in annual turnover.
2 Employed persons include taxable business owners with at least EUR 17,500 in annual turnover and employees liable to social insurance contributions.
3 Employees liable to social insurance contributions (full- and part-time) but excluding marginal employees.
4 Corresponds to number of taxable business owners with at least EUR 17,500 in annual turnover.
5 Marginally employed persons include marginally self-employed persons and marginal employees.
6 Marginally self-employed persons include freelancers and self-employed persons with less than EUR 17,500 in annual turnover based on the microcensus.
7 Marginal employees (i.e., employees on low pay and temporarily employed persons) based on the employment statistics of the Federal Employment Agency (cut-off date: June 30).
8 Includes all self-employed and dependently employed persons, including marginal employees and marginally self-employed persons.
9 Figures may deviate from those in the previous years’ monitoring reports owing to changes in the definition of the various groups.

2.2 Contribution of the Culture and Creative Industries towards Value Added

Low growth in gross value added

While gross value added in the culture and creative industries underwent only minimal growth between 2009 and 2012, other sectors of industry, particularly those with strong exports such as mechanical engineering and automotive, have benefited to a much greater extent from the economic upturn. Since 2009, gross value added in these industries rose, respectively, by 34% from EUR 65.5 billion to EUR 87.9 billion (mechanical engineering) and by 64% from EUR 67.2 billion to EUR 110.4 billion (automotive) (see Figure 2.1). The chemical and energy supply industries performed less well than the culture and creative industries. However, in 2012 energy utilities succeeded in compensating for the decline in gross value added they had sustained between 2010 and 2011.

Figure 2.1: Contribution of the culture and creative industries to gross value added compared to other economic sectors 2009-2012 (in EUR bn)

<table>
<thead>
<tr>
<th>Year</th>
<th>Chemical industry</th>
<th>Energy supply</th>
<th>Culture and creative industries</th>
<th>Financial services</th>
<th>Mechanical engineering</th>
<th>Automotive</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>34.2</td>
<td>40.3</td>
<td>54.9</td>
<td>48.1</td>
<td>59.7</td>
<td>61.3</td>
</tr>
<tr>
<td>2010</td>
<td>40.4</td>
<td>40.9</td>
<td>58.1</td>
<td>55.8</td>
<td>61.3</td>
<td>63.6</td>
</tr>
<tr>
<td>2011</td>
<td>40.3</td>
<td>55.8</td>
<td>54.9</td>
<td>54.9</td>
<td>61.3</td>
<td>63.6</td>
</tr>
<tr>
<td>2012</td>
<td>48.1</td>
<td>58.1</td>
<td>61.3</td>
<td>67.4</td>
<td>71.8</td>
<td>86.0</td>
</tr>
</tbody>
</table>

Note: The culture and creative industries correspond to the following two-digit codes from the 2008 Classification of Economic Activities: 58, 59-60, 71, 90-92.

Source: National Accounts, Destatis 2014; ZEW’s own computations.
2.3 Employment in the Culture and Creative Industries

Slight decline in number of employed persons

The number of jobs in the culture and creative industries remained stable in 2013. The number of employed persons rose moderately but steadily between 2009 and 2012, with a minimal year-on-year decrease of 0.4% in 2013 owing to a decline in the number of marginally employed persons. By contrast, the number of freelancers and self-employed persons as well as employees liable to social insurance contributions increased slightly. The other industries in the comparison saw similar developments, with the number of employees varying only slightly during the period under review.

In 2013, a total 1.04 million people worked in the culture and creative industries, either as freelancers or self-employed persons or in dependent employment. However, those in dependent employment (or employees liable to social insurance contributions) accounted for 76.1% of the total, a decidedly smaller proportion than in other industries, where the average is 90%. In other words, the culture and creative industries are home to a relatively large number of freelancers and self-employed persons. In addition, at around 553,000, the number of marginally employed persons in these industries is comparatively high, taking the total number of persons employed in the culture and creative industries in 2013 to around 1.59 million.

Almost exactly as many people worked in the culture and creative industries as in mechanical engineering, however the workforce in the culture and creative industries was far larger than that of the automotive, financial services or even the chemical and energy supply industries. Almost all persons working in the other industries in the comparison are in jobs liable to social insurance contributions or are dependently employed. By contrast, in the culture and creative industries there are a large number of freelancers and self-employed persons with an annual turnover of at least EUR 17,500.

Between 2009 and 2013, the number of dependent employees increased significantly, the number of freelancers and self-employed persons increased slightly, and the number of marginal employees declined.

---

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of employed persons in the culture and creative industries</td>
<td>1,592,836</td>
<td>100%</td>
</tr>
<tr>
<td>Employed persons (excluding marginal employees)</td>
<td>1,039,465</td>
<td>65.3%</td>
</tr>
<tr>
<td>Marginally employed persons</td>
<td>553,372</td>
<td>34.7%</td>
</tr>
<tr>
<td>I) Freelancers and self-employed persons with annual turnover of more than EUR 17,500</td>
<td>248,721</td>
<td>15.6%</td>
</tr>
<tr>
<td>II) Persons in dependent employment (liable to social insurance contributions) (part- and full time)</td>
<td>790,744</td>
<td>49.6%</td>
</tr>
<tr>
<td>III) Self-employed and marginally self-employed persons with annual turnover of less than EUR 17,500</td>
<td>200,937</td>
<td>12.6%</td>
</tr>
<tr>
<td>IV) Marginal employees</td>
<td>352,435</td>
<td>22.1%</td>
</tr>
</tbody>
</table>

*Some figures estimated.
Cultural and creative activities and occupations exist in many parts of the economy, some of which are, according to the definitions used in this report, counted towards the culture and creative industries. However, often people are engaged in cultural and creative activities although the company they work for is not affiliated with what is usually defined as a culture or creative industry. For instance, there are many marketing and advertising jobs in large companies in the manufacturing industry, and some financial services companies may also employ software developers. Conversely, not all employees working in a field that is commonly seen as part of the culture or creative industry necessarily have a cultural or creative occupation – for instance, purely administrative personnel working for a major PR company. In this section, we examine this idea by analysing the various types of cultural and creative activities that exist across Germany. Following the UK government’s approach, certain job profiles are classed here as cultural or creative occupations (see annex to the unabridged version). This makes it possible to evaluate employment-related data within these occupational groups, with reference to both the overall economy and the individual submarkets of the culture and creative industries. To this end, detailed employment data from the Federal Employment Agency is used. In contrast to the classic method of defining economic activities, this kind of data is capable of providing a more complete picture of cultural and creative jobs in Germany.

For an overview see Table 3.1, which details the number of cultural and creative jobs (including both employment liable to social insurance contributions as well as marginal employment) in Germany as at June 2013. Almost two million people in Germany have a cultural or creative occupation.

Table 3.1: Persons in cultural and creative occupations in 2013 – Employees liable to social insurance contributions and marginal employees

<table>
<thead>
<tr>
<th>Industry</th>
<th>Total number of employees</th>
<th>Number of persons in cultural and creative occupations</th>
<th>Share of persons in cultural and creative occupations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music industry</td>
<td>46,575</td>
<td>22,871</td>
<td>49.10%</td>
</tr>
<tr>
<td>Book market</td>
<td>80,297</td>
<td>31,361</td>
<td>39.06%</td>
</tr>
<tr>
<td>Art market</td>
<td>9,923</td>
<td>1,742</td>
<td>17.56%</td>
</tr>
<tr>
<td>Film industry</td>
<td>64,621</td>
<td>26,974</td>
<td>41.74%</td>
</tr>
<tr>
<td>Broadcasting industry</td>
<td>25,031</td>
<td>15,023</td>
<td>60.02%</td>
</tr>
<tr>
<td>Performing arts market</td>
<td>36,679</td>
<td>18,239</td>
<td>49.72%</td>
</tr>
<tr>
<td>Design industry</td>
<td>141,544</td>
<td>47,342</td>
<td>33.45%</td>
</tr>
<tr>
<td>Architecture market</td>
<td>89,047</td>
<td>41,212</td>
<td>46.28%</td>
</tr>
<tr>
<td>Press market</td>
<td>246,889</td>
<td>57,007</td>
<td>23.09%</td>
</tr>
<tr>
<td>Advertising market</td>
<td>212,372</td>
<td>62,418</td>
<td>29.39%</td>
</tr>
<tr>
<td>Software and games industry</td>
<td>312,443</td>
<td>148,805</td>
<td>47.63%</td>
</tr>
<tr>
<td>Other</td>
<td>9,370</td>
<td>1,870</td>
<td>19.96%</td>
</tr>
<tr>
<td>Culture and creative industries</td>
<td>1,143,378</td>
<td>429,970</td>
<td>37.61%</td>
</tr>
<tr>
<td>Overall economy</td>
<td>37,331,784</td>
<td>1,989,812</td>
<td>5.33%</td>
</tr>
<tr>
<td>Overall economy excluding</td>
<td>36,188,406</td>
<td>1,559,842</td>
<td>4.31%</td>
</tr>
</tbody>
</table>


6 The analysis is based on a separate evaluation of data obtained from the following source: Beschäftigungsstatistik, Sozialversicherungspflichtig und geringfügig Beschäftigte nach ausgewählten Tätigkeiten der KldB 2010 sowie zusammengefassten Wirtschaftszweigen der WZ 2008 in Deutschland zum Stichtag 30.06.2013, Nuremberg, data last updated: October 2014 (only available in German).
For a detailed breakdown according to jobs liable to social insurance contributions and marginal employment, please refer to the annex of the unabridged version.

Figure 3.1: Proportion of persons in cultural and creative jobs in the culture and creative industries and their submarkets (in %)

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture and creative industries</td>
<td>37.61</td>
</tr>
<tr>
<td>Broadcasting industry</td>
<td>49.72</td>
</tr>
<tr>
<td>Performing arts market</td>
<td>49.10</td>
</tr>
<tr>
<td>Music industry</td>
<td>47.63</td>
</tr>
<tr>
<td>Software and games industry</td>
<td>46.28</td>
</tr>
<tr>
<td>Architecture market</td>
<td>41.74</td>
</tr>
<tr>
<td>Film industry</td>
<td>39.06</td>
</tr>
<tr>
<td>Book market</td>
<td>33.45</td>
</tr>
<tr>
<td>Design industry</td>
<td>29.39</td>
</tr>
<tr>
<td>Advertising market</td>
<td>23.09</td>
</tr>
<tr>
<td>Press market</td>
<td>19.96</td>
</tr>
<tr>
<td>Other</td>
<td>17.56</td>
</tr>
</tbody>
</table>


Figure 3.2: The cultural and creative economy

- Employees in the culture and creative industries who have jobs that are not cultural or creative in nature: 713,408
- Persons in cultural and creative occupations within the culture and creative industries: 429,970
- Persons in cultural and creative occupations outside the culture and creative industries: 1,559,842


tion. The vast majority of them (1.8 million) are employees liable to social insurance contributions. To compare, employees liable to social insurance contributions and marginal employees account for around 1.1 million, according to the definition of the culture and creative industries and their submarkets (see Table 3.1). This represents a share of 5.3% of all persons in gainful employment. In the culture and creative industries themselves, around 430,000 persons have cultural or creative occupations. They account for 37.6% of all persons employed in these industries. Almost 1.6 million additional persons are in cultural or creative jobs in other sectors of industry (see Figure 3.2). Once the data is broken down by occupation, it emerges that the number of jobs in the culture and creative industries is considerably higher once the analysis focuses on type of activity; in other words, taking into account also those cultural and creative jobs that exist outside the culture or creative industries.

A detailed breakdown by submarket reveals that, just as in the culture and creative industries overall, not all employees in the submarkets of the culture and creative industries actually have cultural or creative jobs (see Figure 3.1). In addition, the share of employees with non-cultural or non-creative jobs varies enormously across submarkets. For instance, in broadcasting, more than 60% of employees in jobs liable to social insurance contributions or marginal employees have cultural or creative jobs, yet the figure drops to 33.5% in design and even to 17.6% in the art market. Generally speaking, the proportion of jobs liable to social insurance contributions in the various submarkets is somewhat greater than that accounted for by marginal employees (see annex to the unabridged version). This suggests that marginal employment tends to be more common in administrative or auxiliary jobs across the culture and creative industries' submarkets. In some submarkets, the proportion of cultural and creative jobs is clearly below the 50% mark. In the art, advertising and press markets and in design, fewer than 10% of marginal employees work in cultural or creative occupations.

---

7 For a detailed breakdown according to jobs liable to social insurance contributions and marginal employment, please refer to the annex of the unabridged version.
4. Cooperation in the Culture and Creative Industries

One of the priority themes of this year’s monitoring report is cooperation, networking and partnerships in Germany’s culture and creative industries. To this end, a representative nationwide survey of businesses and self-employed persons working in the culture and creative industries was carried out, selected results of which are discussed on the following pages. For additional, more detailed information on this issue, please refer to the unabridged version of the report.

Majority of cultural and creative businesses engage in cooperation

On average, 84% of cultural and creative businesses cooperate with partners (see Figure 4.1), such as other businesses, industry-specific associations or public-sector organisations. Within the culture and creative industries, the book market is the submarket with the largest number of companies that work with partners (94%). At around 92%, the number of companies that engage in cooperation in the music and art submarkets is also significantly higher than elsewhere. The share of businesses that cooperate with partners drops to far below the average, with 75% in the press market and broadcasting industry and 69% in architecture.

Micro-companies, self-employed business owners but also large companies with 100 employees or more are disproportionately often engaged in partnerships (see Figure 4.2). By contrast, businesses with between five and 19 employees are least likely to cooperate with a partner.

The majority of cooperation partners are other companies

64% of companies in the culture and creative industries cooperate with other companies (see Figure 4.3). Almost 46% of businesses in the culture and creative industries are members of informal networks, attending, for instance, regular social gatherings on a certain theme, in order to maintain a relationship with their partners. One in three businesses in the culture and creative industries work with industry-specific associations as partners. 23% of businesses work with public-sector organisations. The least likely form of cooperation is that with a university or college (16%).

Partnerships are considered vital for current and future success

48% of companies in the culture and creative industries consider cooperation with partners to be a major factor in ensuring ongoing business success. On average, 25% of companies feel that cooperation is necessary for this, while 23% consider it vital. Companies operating in the performing arts market and the music industry attach particularly high priority to partnerships. Around 63% of businesses in these submarkets consider partnerships a necessary precondition for success. In the advertising, press and architecture markets and in broadcasting, however, not nearly as many companies feel this way.
45% of companies in the culture and creative industries believe that that the significance of partnerships as a success factor will rise towards the end of 2016. As many as 15% expect that their significance will rise considerably. More than half the businesses in the software and games, design, film and music industries believe that partnerships will play an increasingly important role.

Thanks to partnerships, the culture and creative industries are closely intertwined with other sectors of industry

Businesses in the culture and creative industries most frequently engage in partnerships with other businesses in the same industries (see Figure 4.4): 88% of companies that cooperate with another business do so with partners in their own industry. However, most of them maintain partnerships not only with others in their own industry, but also with artists in other submarkets or cultural or creative businesses even outside the culture and creative industries. Of the companies that cooperate with partners, 76% confirmed that they work with partners from the culture and creative industries. Almost half of existing partnerships are with partners in other sectors of industry, suggesting that partnerships often serve to establish links across industries.

Businesses in the culture and creative industries work most frequently with regional partners

Although geographic proximity is less important to the success of a partnership than other factors, cultural and creative companies most frequently cooperate with regional partners (see Figure 4.5). 67% of businesses that engage in cooperation work with partners whose offices are less than 100 km away.

Around 32% of companies in the culture and creative industries work with supraregional partners whose offices are further away than 100 km. A far smaller number work with international partners. International cooperation is particularly frequent among companies in the book, music, film and software and games submarkets. Here, between 22 and 28.9% of companies cooperate with partners outside of Germany. The larger the company, the greater the importance of supraregional or international partners.
5. Summary

In 2013 turnover in the culture and creative industries rose 1.4% year on year, indicating slower growth than in previous years. Since the crisis year of 2009, average turnover growth in the culture and creative industries has been 2.6% per annum.

Turnover in the culture and creative industries grew significantly less than in the general economy

With a turnover growth rate of 1.4% year on year, the culture and creative industries performed far less well than the overall economy (see Figure 5.1), where turnover in 2013 rose 6.9% over the previous year. It should be noted that some industries, especially the export-oriented manufacturing industry, recorded a much more significant drop in demand and gross value added in 2009 than the culture and creative industries, and that these sectors were still struggling to make up those deficits as late as 2011. However, the gaps have since been closed.

Variation across submarkets remains pronounced

There was considerable variation in turnover growth in the individual submarkets (see Figure 5.2). Generally, turnover developed positively, mainly attributable to the software and games submarket, where turnover rose 9.0% every year between 2009 and 2013. Further disproportionately strong contributors were the performing arts market (with 7.5% annual turnover growth), music (5.5%), architecture (4.9%) and art (4.0%). Turnover in the design and film submarkets grew 2.5 and 2.1% per annum, respectively, which was about the same as the average for the entire culture and creative industries. By contrast, turnover growth was below average in the broadcasting, press, advertising and book markets, where annual growth rates ranged between 1.2 and minus 2.2%.

Press (EUR 32 billion in turnover) and advertising (EUR 25 billion), two high-turnover submarkets, registered zero and negative annual growth rates, respectively, between 2009 and 2013. Accordingly, this impacted heavily on the overall performance of the culture and creative industries. These two submarkets evidently have not managed the turnaround just yet. At EUR 31 billion in turnover, software and games was the second strongest submarket, while design, at EUR 19 billion in turnover, came in fourth. These two submarkets remained major contributors to turnover growth in the culture and creative industries in the period under review.

Number of culture and creative businesses increased moderately

In 2013, the number of businesses in the culture and creative industries and in the overall economy each grew 1.2% year on year, so remained stable. By contrast, the number of businesses in the culture and creative industries had grown more strongly in 2011, as had the number of businesses in the overall economy in 2012 (see Figure 5.3).
Between 2009 and 2013, the number of companies in the cultural and creative industries grew by an average of 1.4% per annum (see Figure 5.4). There was a disproportionately strong increase in the number of businesses in the software and games industry (7.6%). The number of businesses also grew in the design industry (4.9%), in performing arts (4.3%) and in the book market (1.7%). Music, film, press, art and especially advertising (minus 4.6%) all saw below-average growth.

Decline in marginal employment – Increase in jobs liable to social insurance contributions

After a period of growth since 2009, the number of persons employed in the culture and creative industries declined 0.4% in 2013 (see Figure 5.5). By contrast, in the overall economy it rose by 0.9%. However, it should be noted that the decline in the culture and creative industries is due to a 3.4% decline in marginal employees, whereas the number of jobs liable to social insurance contributions rose 3.3% year on year (see Figures 5.6 and 5.7). In other words, there was a shift away from marginal to regular employment.

Aid to interpretation: Turnover in the software and games industry grew 9.0% each year between 2009 and 2013.
*Data for 2013 is based on estimates.
Source: Turnover tax statistics, Destatis 2014; ZEW’s own computations.

Aid to interpretation: Between 2011 and 2012 the number of companies in the overall economy rose by 1.1%.
*Data for 2013 is based on estimates.
Source: Turnover tax statistics, Destatis 2014; ZEW’s own computations.
Between 2009 and 2013, the number of self-employed persons and employees liable to social insurance contributions rose by an average of 2.9% per annum (see Figure 5.8). The submarkets with relatively strong turnover growth also had particularly pronounced employment growth rates. For instance, employment in the software and games industry rose 9.6% per annum, hence making an above-average contribution to employment growth across all culture and creative industries.

Employment in the design industry, the fourth largest submarket, increased by 2.6%. Performing arts (4.7% p.a.) and architecture (3.5% p.a.) came in second and third, respectively. Another submarket with positive, albeit slower, employment growth was broadcasting, with the number of employed persons there rising by 2.2% per annum between 2009 and 2013.
The books and advertising submarkets had both negative turnover growth and negative growth in the number of employed persons. The strongest decrease in the number of employed persons was in the press market, the largest submarket in the culture and creative industries, which registered average annual growth in employment of minus 2.4%. In the advertising market, employment decreased by an average of 0.2% a year and stagnated at minus 0.1% in the book market. In 2013, the culture and creative industries as a whole reported 3.3% growth in the number of persons in dependent employment (or employees liable to social insurance contributions), a stronger increase than in the overall economy (1.1%). By contrast, the marginally employed workforce in the culture and creative industries shrunk to a greater extent than that in the overall economy.

Figure 5.6: Development in the number of employees liable to social insurance contributions in the culture and creative industries compared to the overall economy (change in %)

Figure 5.7: Development in the number of marginal employees in the culture and creative industries compared to the overall economy (change in %)

Figure 5.8: Development of employment (self-employed persons and employees liable to social insurance contributions) in the submarkets of the culture and creative industries (average change p.a. 2009-2013* in %)

Aid to interpretation: Employment in the design industry grew by an average of 2.6% per annum between 2009 and 2013.

Partnerships are considered vital for current and future success

47.8% of businesses in the culture and creative industries consider cooperation with partners to be a major factor in ensuring ongoing business success. On average, 25% of businesses feel that cooperation is necessary for this, while 23% consider it vital. This opinion is shared particularly by businesses with up to four employees or a workforce of over 100.

Thanks to partnerships, the culture and creative industries are closely intertwined with other sectors of industry

Businesses in the culture and creative industries companies frequently cooperate with businesses from other sectors of industry. 46.6% of cooperating businesses engage in partnerships with companies in industries that are not part of the culture and creative industries. However, partnerships within the culture and creative industries, either with partners from one’s own submarket (87.8%) or a different submarket (75.8%), dominate. The majority of partners are in the same region, located less than 100 km away, or supraregional; very few are domiciled outside of Germany.

Cooperation helps companies to become better known and open up new target markets

Of the businesses that engage in cooperation, 85% have become better known, while 76% have opened up new target markets. While 69% of businesses developed new products or services by themselves, 80% of companies succeeded in helping their partners to expand their portfolios. Around three quarters of companies were able to increase their flexibility. Far fewer businesses, however, managed to cut costs or improve their financial situation.

Time and effort involved in finding suitable partners is biggest challenge

More than half of businesses feel that the time and effort involved in building new partnerships is an obstacle to cooperation. Almost 40% of companies in the culture and creative industries find it difficult to find suitable partners, particularly if they are micro-companies with fewer than four employees.
Conclusions

After an improvement in economic indicators in the years after the crisis, all economic indicators slowed somewhat in 2013. The culture and creative industries are anticipated to continue developing on an even keel, with some slight improvements. However, the apparent stability of the culture and creative industries overall masks the fact that its submarkets are highly heterogeneous, ranging from the very dynamic software and games industry to the strong consolidation tendencies in the press and book markets. This strong heterogeneity, coupled with the fragmented nature of the culture and creative industries, calls for economic policy measures that are carefully tailored to suit the characteristics of the various submarkets.

Recommendations for action

Possible economic policy approaches to promote cultural and creative businesses include:

- Improved access to funding for start-ups, for instance by extending support schemes to artists, especially during the growth phase.
- Assistance for small businesses and self-employed persons in finding suitable cooperation partners; suggestion of proven cooperation models
- Easier access to international markets to counteract the decline in exports and expand the businesses’ predominantly regional focus to include international perspectives.
## 6. Annex

### 6.1 Detailed Tables

**Table 6.1: Culture and creative industries by submarket: Number of businesses, 2009 to 2013**

<table>
<thead>
<tr>
<th>Submarket</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>13,862</td>
<td>13,723</td>
<td>13,894</td>
<td>13,796</td>
<td>13,812</td>
</tr>
<tr>
<td>2. Book market</td>
<td>16,232</td>
<td>16,481</td>
<td>16,702</td>
<td>16,828</td>
<td>17,063</td>
</tr>
<tr>
<td>3. Art market</td>
<td>13,763</td>
<td>13,464</td>
<td>13,422</td>
<td>13,203</td>
<td>13,032</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>18,312</td>
<td>17,956</td>
<td>18,199</td>
<td>18,282</td>
<td>18,226</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>17,853</td>
<td>17,751</td>
<td>18,128</td>
<td>18,154</td>
<td>18,292</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>14,993</td>
<td>15,402</td>
<td>15,982</td>
<td>16,497</td>
<td>16,992</td>
</tr>
<tr>
<td>7. Design industry</td>
<td>48,332</td>
<td>50,111</td>
<td>52,439</td>
<td>53,676</td>
<td>55,729</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>39,956</td>
<td>40,159</td>
<td>40,702</td>
<td>40,762</td>
<td>41,135</td>
</tr>
<tr>
<td>9. Press market</td>
<td>34,317</td>
<td>33,564</td>
<td>33,498</td>
<td>33,131</td>
<td>32,722</td>
</tr>
<tr>
<td>10. Advertising market</td>
<td>37,082</td>
<td>35,330</td>
<td>34,577</td>
<td>33,448</td>
<td>32,196</td>
</tr>
<tr>
<td>11. Software and games industry</td>
<td>27,018</td>
<td>28,527</td>
<td>30,413</td>
<td>31,915</td>
<td>33,613</td>
</tr>
<tr>
<td>12. Other</td>
<td>7,353</td>
<td>7,506</td>
<td>7,736</td>
<td>7,751</td>
<td>7,943</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td>289,073</td>
<td>289,974</td>
<td>295,692</td>
<td>297,442</td>
<td>300,752</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td>50,594</td>
<td>50,440</td>
<td>51,402</td>
<td>51,627</td>
<td>52,031</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td>238,479</td>
<td>239,534</td>
<td>244,290</td>
<td>245,816</td>
<td>248,721</td>
</tr>
</tbody>
</table>

Contribution of culture and creative industries, 7.61% 7.57% 7.60% 7.56% 7.56%


**Table 6.2: Culture and creative industries by submarket: Turnover (in EUR m), 2009 to 2013**

<table>
<thead>
<tr>
<th>Submarket</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>6,307</td>
<td>6,270</td>
<td>6,619</td>
<td>7,099</td>
<td>7,416</td>
</tr>
<tr>
<td>2. Book market</td>
<td>14,848</td>
<td>14,182</td>
<td>14,255</td>
<td>14,012</td>
<td>13,908</td>
</tr>
<tr>
<td>3. Art market</td>
<td>2,146</td>
<td>2,332</td>
<td>2,341</td>
<td>2,316</td>
<td>2,413</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>8,734</td>
<td>8,925</td>
<td>9,283</td>
<td>9,228</td>
<td>9,285</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>7,445</td>
<td>7,671</td>
<td>7,905</td>
<td>8,327</td>
<td>7,724</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>3,316</td>
<td>3,478</td>
<td>3,742</td>
<td>3,909</td>
<td>4,122</td>
</tr>
<tr>
<td>7. Design industry</td>
<td>17,595</td>
<td>18,243</td>
<td>18,353</td>
<td>18,535</td>
<td>18,931</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>7,967</td>
<td>8,031</td>
<td>8,708</td>
<td>8,813</td>
<td>9,201</td>
</tr>
<tr>
<td>9. Press market</td>
<td>31,341</td>
<td>31,398</td>
<td>31,711</td>
<td>31,931</td>
<td>31,545</td>
</tr>
<tr>
<td>10. Advertising market</td>
<td>25,508</td>
<td>25,714</td>
<td>24,929</td>
<td>24,965</td>
<td>24,890</td>
</tr>
<tr>
<td>11. Software and games industry</td>
<td>24,296</td>
<td>26,496</td>
<td>28,442</td>
<td>29,642</td>
<td>31,466</td>
</tr>
<tr>
<td>12. Other</td>
<td>1,578</td>
<td>1,588</td>
<td>1,652</td>
<td>1,587</td>
<td>1,659</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td>151,080</td>
<td>154,327</td>
<td>157,960</td>
<td>160,385</td>
<td>162,561</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td>16,751</td>
<td>16,993</td>
<td>16,990</td>
<td>17,047</td>
<td>17,277</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td>134,329</td>
<td>137,333</td>
<td>140,970</td>
<td>143,338</td>
<td>145,285</td>
</tr>
<tr>
<td>Overall economy</td>
<td>4,897,938</td>
<td>5,240,997</td>
<td>5,687,179</td>
<td>5,752,249</td>
<td>6,146,870</td>
</tr>
</tbody>
</table>

Contribution of culture and creative industries, 2.74% 2.62% 2.48% 2.49% 2.36%
### Table 6.3: Culture and creative industries by submarket: Employed persons, 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>46,813</td>
<td>46,690</td>
<td>46,627</td>
<td>46,532</td>
<td>47,495</td>
</tr>
<tr>
<td>2. Book market</td>
<td>78,831</td>
<td>76,850</td>
<td>79,498</td>
<td>78,808</td>
<td>78,410</td>
</tr>
<tr>
<td>3. Art market</td>
<td>19,422</td>
<td>19,160</td>
<td>18,943</td>
<td>18,910</td>
<td>18,668</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>58,496</td>
<td>57,280</td>
<td>57,740</td>
<td>57,627</td>
<td>56,868</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>38,890</td>
<td>38,881</td>
<td>39,690</td>
<td>39,867</td>
<td>41,483</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>32,295</td>
<td>33,220</td>
<td>34,112</td>
<td>35,383</td>
<td>37,013</td>
</tr>
<tr>
<td>7. Design industry</td>
<td>125,426</td>
<td>125,854</td>
<td>128,415</td>
<td>131,740</td>
<td>135,528</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>100,064</td>
<td>101,889</td>
<td>105,079</td>
<td>107,737</td>
<td>111,083</td>
</tr>
<tr>
<td>10. Advertising market</td>
<td>140,935</td>
<td>136,963</td>
<td>138,870</td>
<td>140,388</td>
<td>140,611</td>
</tr>
<tr>
<td>12. Other</td>
<td>15,345</td>
<td>14,991</td>
<td>15,184</td>
<td>15,434</td>
<td>15,662</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td>1,068,553</td>
<td>1,066,748</td>
<td>1,093,644</td>
<td>1,130,646</td>
<td>1,160,337</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td>115,621</td>
<td>114,378</td>
<td>117,012</td>
<td>119,101</td>
<td>121,735</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td>952,932</td>
<td>952,370</td>
<td>976,633</td>
<td>1,011,544</td>
<td>1,038,601</td>
</tr>
<tr>
<td>Overall economy</td>
<td>30,738,823</td>
<td>31,131,887</td>
<td>31,858,678</td>
<td>32,530,353</td>
<td>32,905,776</td>
</tr>
<tr>
<td>Contribution of culture and creative industries</td>
<td>3.10%</td>
<td>3.06%</td>
<td>3.07%</td>
<td>3.11%</td>
<td>3.16%</td>
</tr>
</tbody>
</table>

Note: *Estimates concerning number of self-employed persons (correspond to number of businesses).


### Table 6.4: Culture and creative industries by submarket: Persons in dependent employment, 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>32,951</td>
<td>32,967</td>
<td>32,733</td>
<td>32,736</td>
<td>33,683</td>
</tr>
<tr>
<td>2. Book market</td>
<td>62,599</td>
<td>60,369</td>
<td>62,796</td>
<td>61,980</td>
<td>61,347</td>
</tr>
<tr>
<td>3. Art market</td>
<td>5,659</td>
<td>5,696</td>
<td>5,521</td>
<td>5,707</td>
<td>5,636</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>40,184</td>
<td>39,324</td>
<td>39,541</td>
<td>39,345</td>
<td>38,642</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>21,037</td>
<td>21,130</td>
<td>21,562</td>
<td>21,713</td>
<td>23,192</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>17,302</td>
<td>17,818</td>
<td>18,130</td>
<td>18,886</td>
<td>20,885</td>
</tr>
<tr>
<td>7. Design industry</td>
<td>77,094</td>
<td>75,743</td>
<td>75,976</td>
<td>78,065</td>
<td>79,799</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>60,108</td>
<td>61,730</td>
<td>64,377</td>
<td>66,975</td>
<td>69,948</td>
</tr>
<tr>
<td>11. Software and games industry</td>
<td>216,735</td>
<td>223,149</td>
<td>237,992</td>
<td>267,442</td>
<td>287,657</td>
</tr>
<tr>
<td>12. Other</td>
<td>7,992</td>
<td>7,485</td>
<td>7,448</td>
<td>7,683</td>
<td>7,720</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td>779,480</td>
<td>776,774</td>
<td>797,953</td>
<td>833,203</td>
<td>860,449</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td>65,027</td>
<td>63,938</td>
<td>65,610</td>
<td>67,475</td>
<td>69,705</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td>714,453</td>
<td>712,836</td>
<td>732,343</td>
<td>765,729</td>
<td>790,744</td>
</tr>
<tr>
<td>Overall economy</td>
<td>27,603,281</td>
<td>27,966,601</td>
<td>28,643,583</td>
<td>29,280,034</td>
<td>29,615,680</td>
</tr>
<tr>
<td>Contribution of culture and creative industries</td>
<td>2.59%</td>
<td>2.55%</td>
<td>2.56%</td>
<td>2.62%</td>
<td>2.67%</td>
</tr>
</tbody>
</table>

Table 6.5: Culture and creative industries by submarket: Marginal employees, 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>11,848</td>
<td>11,909</td>
<td>12,114</td>
<td>12,669</td>
<td>12,892</td>
</tr>
<tr>
<td>2. Book market</td>
<td>21,269</td>
<td>20,914</td>
<td>20,362</td>
<td>19,762</td>
<td>18,950</td>
</tr>
<tr>
<td>3. Art market</td>
<td>4,588</td>
<td>4,465</td>
<td>4,392</td>
<td>4,347</td>
<td>4,287</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>29,082</td>
<td>27,983</td>
<td>26,692</td>
<td>26,535</td>
<td>25,779</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>2,141</td>
<td>2,041</td>
<td>1,748</td>
<td>1,722</td>
<td>1,839</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>12,797</td>
<td>12,972</td>
<td>13,699</td>
<td>14,751</td>
<td>15,794</td>
</tr>
<tr>
<td>7. Design industry</td>
<td>65,255</td>
<td>66,942</td>
<td>63,950</td>
<td>62,095</td>
<td>61,746</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>18,102</td>
<td>18,069</td>
<td>18,372</td>
<td>18,451</td>
<td>19,099</td>
</tr>
<tr>
<td>10. Advertising market</td>
<td>118,970</td>
<td>123,134</td>
<td>115,252</td>
<td>110,717</td>
<td>103,957</td>
</tr>
<tr>
<td>12. Other</td>
<td>1,914</td>
<td>1,770</td>
<td>1,754</td>
<td>1,682</td>
<td>1,650</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td>441,456</td>
<td>445,055</td>
<td>431,885</td>
<td>426,777</td>
<td>414,143</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td>64,624</td>
<td>66,190</td>
<td>63,442</td>
<td>61,762</td>
<td>61,708</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td>376,832</td>
<td>378,865</td>
<td>368,443</td>
<td>365,014</td>
<td>352,435</td>
</tr>
<tr>
<td>Overall economy</td>
<td>7,359,609</td>
<td>7,450,194</td>
<td>7,536,790</td>
<td>7,591,384</td>
<td>7,716,104</td>
</tr>
</tbody>
</table>


Table 6.6: Number of companies in the culture and creative industries according to submarkets and categories of economic activity (“WZ”) from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>90.03.1</td>
<td>Own-account composers, etc.</td>
<td>2,656</td>
<td>2,643</td>
<td>2,683</td>
<td>2,695</td>
<td>2,709</td>
</tr>
<tr>
<td>90.01.2</td>
<td>Ballet companies, orchestras, bands and choirs</td>
<td>1,828</td>
<td>1,661</td>
<td>1,666</td>
<td>1,560</td>
<td>1,479</td>
</tr>
<tr>
<td>59.20.1</td>
<td>Sound-recording studios, etc.</td>
<td>479</td>
<td>539</td>
<td>583</td>
<td>610</td>
<td>662</td>
</tr>
<tr>
<td>59.20.2</td>
<td>Publishing of sound recordings</td>
<td>395</td>
<td>390</td>
<td>383</td>
<td>366</td>
<td>360</td>
</tr>
<tr>
<td>59.20.3</td>
<td>Publishing of printed music</td>
<td>1,200</td>
<td>1,149</td>
<td>1,134</td>
<td>1,095</td>
<td>1,062</td>
</tr>
<tr>
<td>90.04.1</td>
<td>Organisation of theatre performances and concerts</td>
<td>1,414</td>
<td>1,400</td>
<td>1,378</td>
<td>1,337</td>
<td>1,319</td>
</tr>
<tr>
<td>90.04.2</td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>228</td>
<td>228</td>
<td>228</td>
<td>217</td>
<td>217</td>
</tr>
<tr>
<td>90.02</td>
<td>Support activities to performing arts</td>
<td>2,024</td>
<td>2,109</td>
<td>2,249</td>
<td>2,395</td>
<td>2,508</td>
</tr>
<tr>
<td>47.59.3</td>
<td>Retail sale of musical instruments, etc</td>
<td>2,235</td>
<td>2,142</td>
<td>2,087</td>
<td>1,998</td>
<td>1,924</td>
</tr>
<tr>
<td>47.63</td>
<td>Retail sale of music and video recordings, etc.</td>
<td>238</td>
<td>282</td>
<td>306</td>
<td>319</td>
<td>353</td>
</tr>
<tr>
<td>32.20</td>
<td>Manufacture of musical instruments</td>
<td>1,165</td>
<td>1,180</td>
<td>1,197</td>
<td>1,204</td>
<td>1,220</td>
</tr>
<tr>
<td>Submarket total</td>
<td></td>
<td>13,862</td>
<td>13,723</td>
<td>13,894</td>
<td>13,796</td>
<td>13,812</td>
</tr>
</tbody>
</table>
Table 6.6: Number of companies in the culture and creative industries according to submarkets and categories of economic activity (“WZ”) from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Book market</td>
<td>Own-account writers</td>
<td>6,616</td>
<td>6,941</td>
<td>7,146</td>
<td>7,348</td>
<td>7,613</td>
</tr>
<tr>
<td></td>
<td>Translation activities</td>
<td>1,584</td>
<td>1,625</td>
<td>1,718</td>
<td>1,811</td>
<td>1,878</td>
</tr>
<tr>
<td></td>
<td>Book publishing</td>
<td>2,193</td>
<td>2,220</td>
<td>2,243</td>
<td>2,209</td>
<td>2,234</td>
</tr>
<tr>
<td></td>
<td>Retail sale of books</td>
<td>4,290</td>
<td>4,195</td>
<td>4,137</td>
<td>4,038</td>
<td>3,962</td>
</tr>
<tr>
<td></td>
<td>Retail sale of second-hand books</td>
<td>479</td>
<td>459</td>
<td>448</td>
<td>429</td>
<td>414</td>
</tr>
<tr>
<td></td>
<td>Binding and related services</td>
<td>1,070</td>
<td>1,041</td>
<td>1,010</td>
<td>993</td>
<td>963</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>16,232</td>
<td>16,481</td>
<td>16,702</td>
<td>16,828</td>
<td>17,063</td>
</tr>
<tr>
<td>3. Art market</td>
<td>Own-account visual artists</td>
<td>8,883</td>
<td>8,814</td>
<td>8,932</td>
<td>8,892</td>
<td>8,917</td>
</tr>
<tr>
<td></td>
<td>Retail sale of art, etc.</td>
<td>1,797</td>
<td>1,712</td>
<td>1,685</td>
<td>1,632</td>
<td>1,576</td>
</tr>
<tr>
<td></td>
<td>Museums activities</td>
<td>890</td>
<td>823</td>
<td>764</td>
<td>672</td>
<td>609</td>
</tr>
<tr>
<td></td>
<td>Retail sale of antiques, etc.</td>
<td>2,193</td>
<td>2,115</td>
<td>2,041</td>
<td>2,007</td>
<td>1,931</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>13,763</td>
<td>13,464</td>
<td>13,422</td>
<td>13,203</td>
<td>13,032</td>
</tr>
<tr>
<td>4. Film industry</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>8,455</td>
<td>8,710</td>
<td>9,180</td>
<td>9,591</td>
<td>9,954</td>
</tr>
<tr>
<td></td>
<td>Motion picture, video and TV programme production</td>
<td>5,785</td>
<td>5,253</td>
<td>5,118</td>
<td>4,988</td>
<td>4,655</td>
</tr>
<tr>
<td></td>
<td>Motion picture, video and TV programme post-production</td>
<td>696</td>
<td>767</td>
<td>851</td>
<td>861</td>
<td>939</td>
</tr>
<tr>
<td></td>
<td>Motion picture, video and TV programme distribution</td>
<td>929</td>
<td>865</td>
<td>792</td>
<td>711</td>
<td>643</td>
</tr>
<tr>
<td></td>
<td>Motion picture projection</td>
<td>888</td>
<td>878</td>
<td>865</td>
<td>843</td>
<td>832</td>
</tr>
<tr>
<td></td>
<td>Retail sale of music and video recordings, etc.</td>
<td>238</td>
<td>282</td>
<td>306</td>
<td>319</td>
<td>353</td>
</tr>
<tr>
<td></td>
<td>Renting of video tapes and disks</td>
<td>1,321</td>
<td>1,201</td>
<td>1,087</td>
<td>969</td>
<td>852</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>18,312</td>
<td>17,956</td>
<td>18,199</td>
<td>18,282</td>
<td>18,226</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td>Own-account journalists and press photographers</td>
<td>17,500</td>
<td>17,401</td>
<td>17,782</td>
<td>17,810</td>
<td>17,951</td>
</tr>
<tr>
<td></td>
<td>Radio broadcasting</td>
<td>266</td>
<td>262</td>
<td>255</td>
<td>255</td>
<td>250</td>
</tr>
<tr>
<td></td>
<td>Television programming and broadcasting</td>
<td>87</td>
<td>88</td>
<td>91</td>
<td>89</td>
<td>91</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>17,853</td>
<td>17,751</td>
<td>18,128</td>
<td>18,154</td>
<td>18,292</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>8,455</td>
<td>8,710</td>
<td>9,180</td>
<td>9,591</td>
<td>9,954</td>
</tr>
<tr>
<td></td>
<td>Own-account performers and circus groups</td>
<td>564</td>
<td>573</td>
<td>546</td>
<td>550</td>
<td>541</td>
</tr>
<tr>
<td></td>
<td>Theatre ensembles</td>
<td>126</td>
<td>124</td>
<td>128</td>
<td>131</td>
<td>132</td>
</tr>
<tr>
<td></td>
<td>Organisation of theatre performances and concerts</td>
<td>1,414</td>
<td>1,400</td>
<td>1,378</td>
<td>1,337</td>
<td>1,319</td>
</tr>
<tr>
<td></td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>228</td>
<td>228</td>
<td>228</td>
<td>217</td>
<td>217</td>
</tr>
<tr>
<td></td>
<td>Operation of variety theatres and cabarets</td>
<td>196</td>
<td>178</td>
<td>168</td>
<td>165</td>
<td>151</td>
</tr>
<tr>
<td></td>
<td>Support activities to performing arts</td>
<td>2,024</td>
<td>2,109</td>
<td>2,249</td>
<td>2,395</td>
<td>2,508</td>
</tr>
<tr>
<td></td>
<td>Cultural education</td>
<td>1,986</td>
<td>2,080</td>
<td>2,105</td>
<td>2,111</td>
<td>2,171</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>14,993</td>
<td>15,402</td>
<td>15,982</td>
<td>16,497</td>
<td>16,992</td>
</tr>
</tbody>
</table>
Table 6.6: Number of companies in the culture and creative industries according to submarkets and categories of economic activity (“WZ”) from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7. Design industry</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>74.10.1</td>
<td>Industrial, product and fashion designers</td>
<td>1,606</td>
<td>2,164</td>
<td>2,586</td>
<td>2,975</td>
<td>3,465</td>
</tr>
<tr>
<td>74.10.2</td>
<td>Graphics and communications designers</td>
<td>5,506</td>
<td>7,269</td>
<td>8,725</td>
<td>10,054</td>
<td>11,664</td>
</tr>
<tr>
<td>74.10.3</td>
<td>Interior decorators</td>
<td>8,017</td>
<td>7,679</td>
<td>7,773</td>
<td>7,303</td>
<td>7,181</td>
</tr>
<tr>
<td>71.11.2</td>
<td>Consulting architectural activities in interior design</td>
<td>2,675</td>
<td>3,185</td>
<td>3,577</td>
<td>3,862</td>
<td>4,313</td>
</tr>
<tr>
<td>73.11</td>
<td>Advertising agencies (50% share)</td>
<td>18,060</td>
<td>17,125</td>
<td>16,702</td>
<td>16,096</td>
<td>15,417</td>
</tr>
<tr>
<td>32.12</td>
<td>Manufacture of jewellery and related articles</td>
<td>3,777</td>
<td>3,706</td>
<td>3,661</td>
<td>3,603</td>
<td>3,545</td>
</tr>
<tr>
<td>74.20.1</td>
<td>Photographers</td>
<td>8,691</td>
<td>8,983</td>
<td>9,415</td>
<td>9,783</td>
<td>10,145</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>48,332</td>
<td>50,111</td>
<td>52,439</td>
<td>53,676</td>
<td>55,729</td>
</tr>
<tr>
<td><strong>8. Architecture market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>71.11.1</td>
<td>Consulting architectural activities in building construction</td>
<td>28,140</td>
<td>27,587</td>
<td>27,554</td>
<td>27,137</td>
<td>26,844</td>
</tr>
<tr>
<td>71.11.2</td>
<td>Consulting architectural activities in interior design</td>
<td>2,675</td>
<td>3,185</td>
<td>3,577</td>
<td>3,862</td>
<td>4,313</td>
</tr>
<tr>
<td>71.11.3</td>
<td>Consulting architectural activities in town, city and regional planning</td>
<td>4,664</td>
<td>4,828</td>
<td>4,990</td>
<td>5,088</td>
<td>5,251</td>
</tr>
<tr>
<td>71.11.4</td>
<td>Consulting architectural activities in landscape architecture</td>
<td>3,072</td>
<td>3,088</td>
<td>3,108</td>
<td>3,156</td>
<td>3,174</td>
</tr>
<tr>
<td>90.03.4</td>
<td>Own-account restorers</td>
<td>1,405</td>
<td>1,471</td>
<td>1,473</td>
<td>1,519</td>
<td>1,553</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>39,956</td>
<td>40,159</td>
<td>40,702</td>
<td>40,762</td>
<td>41,135</td>
</tr>
<tr>
<td><strong>9. Press market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.5</td>
<td>Own-account journalists and press photographers</td>
<td>17,500</td>
<td>17,401</td>
<td>17,782</td>
<td>18,810</td>
<td>17,951</td>
</tr>
<tr>
<td>63.91</td>
<td>News agency activities</td>
<td>995</td>
<td>989</td>
<td>988</td>
<td>978</td>
<td>975</td>
</tr>
<tr>
<td>58.12</td>
<td>Publishing of directories and mailing lists</td>
<td>211</td>
<td>200</td>
<td>217</td>
<td>211</td>
<td>214</td>
</tr>
<tr>
<td>58.13</td>
<td>Publishing of newspapers</td>
<td>831</td>
<td>829</td>
<td>826</td>
<td>845</td>
<td>843</td>
</tr>
<tr>
<td>58.14</td>
<td>Publishing of journals and periodicals</td>
<td>1,848</td>
<td>1,782</td>
<td>1,741</td>
<td>1,722</td>
<td>1,669</td>
</tr>
<tr>
<td>58.19</td>
<td>Other publishing activities (excluding software)</td>
<td>3,396</td>
<td>3,144</td>
<td>3,053</td>
<td>3,002</td>
<td>2,831</td>
</tr>
<tr>
<td>47.62</td>
<td>Retail sale of newspapers and stationery</td>
<td>9,536</td>
<td>9,219</td>
<td>8,891</td>
<td>8,563</td>
<td>8,241</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>34,317</td>
<td>33,564</td>
<td>33,498</td>
<td>33,131</td>
<td>32,722</td>
</tr>
<tr>
<td><strong>10. Advertising market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73.11</td>
<td>Advertising agencies</td>
<td>36,120</td>
<td>34,250</td>
<td>33,404</td>
<td>32,191</td>
<td>30,833</td>
</tr>
<tr>
<td>73.12</td>
<td>Media representation</td>
<td>962</td>
<td>1,080</td>
<td>1,173</td>
<td>1,257</td>
<td>1,363</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>37,082</td>
<td>35,330</td>
<td>34,577</td>
<td>33,448</td>
<td>32,196</td>
</tr>
<tr>
<td><strong>11. Software and games industry</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>58.21</td>
<td>Publishing of computer games</td>
<td>392</td>
<td>354</td>
<td>336</td>
<td>326</td>
<td>298</td>
</tr>
<tr>
<td>63.12</td>
<td>Web portals</td>
<td>190</td>
<td>271</td>
<td>341</td>
<td>415</td>
<td>491</td>
</tr>
<tr>
<td>62.01.1</td>
<td>Web-page design and programming</td>
<td>7,457</td>
<td>8,256</td>
<td>9,037</td>
<td>9,603</td>
<td>10,393</td>
</tr>
<tr>
<td>62.01.9</td>
<td>Other software development</td>
<td>18,625</td>
<td>19,172</td>
<td>20,165</td>
<td>21,042</td>
<td>21,812</td>
</tr>
<tr>
<td>58.29</td>
<td>Other software publishing</td>
<td>354</td>
<td>474</td>
<td>534</td>
<td>529</td>
<td>619</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>27,018</td>
<td>28,527</td>
<td>30,413</td>
<td>31,915</td>
<td>33,613</td>
</tr>
</tbody>
</table>
### Table 6.6: Number of companies in the culture and creative industries according to submarkets and categories of economic activity (“WZ”) from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Other</td>
<td>Libraries and archives</td>
<td>111</td>
<td>100</td>
<td>101</td>
<td>81</td>
<td>76</td>
</tr>
<tr>
<td></td>
<td>Operation of historical sites and buildings and similar visitor attractions</td>
<td>104</td>
<td>95</td>
<td>95</td>
<td>92</td>
<td>88</td>
</tr>
<tr>
<td></td>
<td>Botanical and zoological gardens and nature reserves</td>
<td>262</td>
<td>265</td>
<td>260</td>
<td>247</td>
<td>246</td>
</tr>
<tr>
<td>74.30.2</td>
<td>Interpretation activities</td>
<td>6,006</td>
<td>6,237</td>
<td>6,456</td>
<td>6,547</td>
<td>6,772</td>
</tr>
<tr>
<td>74.20.2</td>
<td>Photographic laboratories</td>
<td>518</td>
<td>466</td>
<td>466</td>
<td>428</td>
<td>402</td>
</tr>
<tr>
<td>32.11</td>
<td>Striking of coins</td>
<td>49</td>
<td>54</td>
<td>54</td>
<td>53</td>
<td>56</td>
</tr>
<tr>
<td>32.13</td>
<td>Manufacture of imitation jewellery</td>
<td>303</td>
<td>289</td>
<td>304</td>
<td>303</td>
<td>304</td>
</tr>
<tr>
<td></td>
<td><strong>Submarket total</strong></td>
<td><strong>7,353</strong></td>
<td><strong>7,506</strong></td>
<td><strong>7,736</strong></td>
<td><strong>7,751</strong></td>
<td><strong>7,943</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Total, including double counts</strong></td>
<td><strong>289,073</strong></td>
<td><strong>289,974</strong></td>
<td><strong>295,692</strong></td>
<td><strong>297,442</strong></td>
<td><strong>300,752</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Duplicate categories of economic activity</strong></td>
<td><strong>50,594</strong></td>
<td><strong>50,440</strong></td>
<td><strong>51,402</strong></td>
<td><strong>51,627</strong></td>
<td><strong>52,031</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Culture and creative industries (excluding double counts)</strong></td>
<td><strong>238,479</strong></td>
<td><strong>239,534</strong></td>
<td><strong>244,290</strong></td>
<td><strong>245,816</strong></td>
<td><strong>248,721</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Contribution of culture and creative industries</strong></td>
<td><strong>7.61%</strong></td>
<td><strong>7.57%</strong></td>
<td><strong>7.60%</strong></td>
<td><strong>7.56%</strong></td>
<td><strong>7.56%</strong></td>
</tr>
</tbody>
</table>

Note: *Data for 2013 estimated, based on previous year’s developments and economic statistics.
Source: Turnover tax statistics, Destatis 2014; ZEW’s own computations.

### Table 6.7: Turnover (in EUR m) in the culture and creative industries according to submarkets and categories of economic activity

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>Own-account composers, etc.</td>
<td>261</td>
<td>261</td>
<td>274</td>
<td>283</td>
<td>290</td>
</tr>
<tr>
<td></td>
<td>Ballet companies, orchestras, bands and choirs</td>
<td>225</td>
<td>210</td>
<td>239</td>
<td>233</td>
<td>240</td>
</tr>
<tr>
<td>59.20.1</td>
<td>Sound-recording studios, etc.</td>
<td>93</td>
<td>109</td>
<td>125</td>
<td>134</td>
<td>138</td>
</tr>
<tr>
<td>59.20.2</td>
<td>Publishing of sound recordings</td>
<td>1,215</td>
<td>989</td>
<td>1,016</td>
<td>983</td>
<td>1,012</td>
</tr>
<tr>
<td>59.20.3</td>
<td>Publishing of printed music</td>
<td>587</td>
<td>549</td>
<td>571</td>
<td>918</td>
<td>944</td>
</tr>
<tr>
<td>90.04.1</td>
<td>Organisation of theatre performances and concerts</td>
<td>1,437</td>
<td>1,509</td>
<td>1,644</td>
<td>1,639</td>
<td>1,743</td>
</tr>
<tr>
<td>90.04.2</td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>361</td>
<td>389</td>
<td>403</td>
<td>453</td>
<td>474</td>
</tr>
<tr>
<td>90.02</td>
<td>Support activities to performing arts</td>
<td>379</td>
<td>402</td>
<td>440</td>
<td>461</td>
<td>491</td>
</tr>
<tr>
<td>47.59.3</td>
<td>Retail sale of musical instruments, etc</td>
<td>1,105</td>
<td>1,175</td>
<td>1,207</td>
<td>1,245</td>
<td>1,296</td>
</tr>
<tr>
<td>47.63</td>
<td>Retail sale of music and video recordings, etc.</td>
<td>113</td>
<td>126</td>
<td>140</td>
<td>158</td>
<td>172</td>
</tr>
<tr>
<td>32.20</td>
<td>Manufacture of musical instruments</td>
<td>532</td>
<td>551</td>
<td>579</td>
<td>592</td>
<td>615</td>
</tr>
<tr>
<td></td>
<td><strong>Submarket total</strong></td>
<td><strong>6,307</strong></td>
<td><strong>6,270</strong></td>
<td><strong>6,639</strong></td>
<td><strong>7,099</strong></td>
<td><strong>7,416</strong></td>
</tr>
</tbody>
</table>
Table 6.7: Turnover (in EUR m) in the culture and creative industries according to submarkets and categories of economic activity

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Book market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.2</td>
<td>Own-account writers</td>
<td>522</td>
<td>552</td>
<td>568</td>
<td>570</td>
<td>593</td>
</tr>
<tr>
<td>74.30.1</td>
<td>Translation activities</td>
<td>271</td>
<td>274</td>
<td>295</td>
<td>287</td>
<td>307</td>
</tr>
<tr>
<td>58.11</td>
<td>Book publishing</td>
<td>9,590</td>
<td>8,848</td>
<td>8,945</td>
<td>8,754</td>
<td>8,597</td>
</tr>
<tr>
<td>47.61.</td>
<td>Retail sale of books</td>
<td>3,667</td>
<td>3,600</td>
<td>3,506</td>
<td>3,551</td>
<td>3,470</td>
</tr>
<tr>
<td>47.79.2</td>
<td>Retail sale of second-hand books</td>
<td>66</td>
<td>72</td>
<td>70</td>
<td>65</td>
<td>67</td>
</tr>
<tr>
<td>18.14</td>
<td>Binding and related services</td>
<td>732</td>
<td>836</td>
<td>871</td>
<td>805</td>
<td>875</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>14,848</td>
<td>14,182</td>
<td>14,255</td>
<td>14,032</td>
<td>13,908</td>
</tr>
<tr>
<td>3. Art market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.3</td>
<td>Own-account visual artists</td>
<td>730</td>
<td>750</td>
<td>753</td>
<td>765</td>
<td>776</td>
</tr>
<tr>
<td>47.78.3</td>
<td>Retail sale of art, etc.</td>
<td>594</td>
<td>660</td>
<td>742</td>
<td>707</td>
<td>781</td>
</tr>
<tr>
<td>91.02</td>
<td>Museums activities</td>
<td>412</td>
<td>518</td>
<td>414</td>
<td>428</td>
<td>429</td>
</tr>
<tr>
<td>47.79.1</td>
<td>Retail sale of antiques, etc.</td>
<td>409</td>
<td>404</td>
<td>432</td>
<td>416</td>
<td>428</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>2,146</td>
<td>2,332</td>
<td>2,341</td>
<td>2,316</td>
<td>2,413</td>
</tr>
<tr>
<td>4. Film industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.01.4</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>720</td>
<td>752</td>
<td>806</td>
<td>870</td>
<td>913</td>
</tr>
<tr>
<td>59.11</td>
<td>Motion picture, video and TV programme production</td>
<td>4,447</td>
<td>4,489</td>
<td>4,458</td>
<td>4,444</td>
<td>4,457</td>
</tr>
<tr>
<td>59.12</td>
<td>Motion picture, video and TV programme post-production</td>
<td>124</td>
<td>153</td>
<td>164</td>
<td>181</td>
<td>181</td>
</tr>
<tr>
<td>59.13</td>
<td>Motion picture, video and TV programme distribution</td>
<td>1,667</td>
<td>1,815</td>
<td>1,993</td>
<td>1,752</td>
<td>1,757</td>
</tr>
<tr>
<td>59.14</td>
<td>Motion picture projection</td>
<td>1,315</td>
<td>1,276</td>
<td>1,419</td>
<td>1,527</td>
<td>1,532</td>
</tr>
<tr>
<td>47.63</td>
<td>Retail sale of music and video recordings, etc.</td>
<td>113</td>
<td>126</td>
<td>140</td>
<td>158</td>
<td>172</td>
</tr>
<tr>
<td>77.22</td>
<td>Renting of video tapes and disks</td>
<td>348</td>
<td>315</td>
<td>302</td>
<td>296</td>
<td>273</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>8,734</td>
<td>8,925</td>
<td>9,283</td>
<td>9,228</td>
<td>9,285</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.5</td>
<td>Own-account journalists and press photographers</td>
<td>1,208</td>
<td>1,219</td>
<td>1,258</td>
<td>1,223</td>
<td>1,248</td>
</tr>
<tr>
<td>60.10</td>
<td>Radio broadcasting</td>
<td>1,004</td>
<td>965</td>
<td>962</td>
<td>969</td>
<td>930</td>
</tr>
<tr>
<td>60.20</td>
<td>Television programming and broadcasting</td>
<td>5,233</td>
<td>5,487</td>
<td>5,686</td>
<td>6,135</td>
<td>5,546</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>7,445</td>
<td>7,671</td>
<td>7,905</td>
<td>8,327</td>
<td>7,724</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.01.4</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>720</td>
<td>752</td>
<td>806</td>
<td>870</td>
<td>913</td>
</tr>
<tr>
<td>90.01.3</td>
<td>Own-account performers and circus groups</td>
<td>51</td>
<td>55</td>
<td>60</td>
<td>57</td>
<td>61</td>
</tr>
<tr>
<td>90.01.1</td>
<td>Theatre ensembles</td>
<td>53</td>
<td>54</td>
<td>55</td>
<td>81</td>
<td>82</td>
</tr>
<tr>
<td>90.04.1</td>
<td>Organisation of theatre performances and concerts</td>
<td>1,437</td>
<td>1,509</td>
<td>1,644</td>
<td>1,639</td>
<td>1,743</td>
</tr>
<tr>
<td>90.04.2</td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>361</td>
<td>389</td>
<td>403</td>
<td>453</td>
<td>474</td>
</tr>
<tr>
<td>90.04.3</td>
<td>Operation of variety theatres and cabarets</td>
<td>81</td>
<td>78</td>
<td>82</td>
<td>84</td>
<td>85</td>
</tr>
<tr>
<td>90.02</td>
<td>Support activities to performing arts</td>
<td>379</td>
<td>402</td>
<td>440</td>
<td>461</td>
<td>491</td>
</tr>
<tr>
<td>85.52</td>
<td>Cultural education</td>
<td>235</td>
<td>239</td>
<td>252</td>
<td>265</td>
<td>274</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>3,316</td>
<td>3,478</td>
<td>3,742</td>
<td>3,909</td>
<td>4,122</td>
</tr>
</tbody>
</table>
**Table 6.7: Turnover (in EUR m) in the culture and creative industries according to submarkets and categories of economic activity**

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>7. Design industry</td>
<td>74.10.1 Industrial, product and fashion designers</td>
<td>237</td>
<td>327</td>
<td>419</td>
<td>475</td>
<td>509</td>
</tr>
<tr>
<td></td>
<td>74.10.2 Graphics and communications designers</td>
<td>495</td>
<td>627</td>
<td>749</td>
<td>856</td>
<td>918</td>
</tr>
<tr>
<td></td>
<td>74.10.3 Interior decorators</td>
<td>1,012</td>
<td>981</td>
<td>1,040</td>
<td>972</td>
<td>1,042</td>
</tr>
<tr>
<td></td>
<td>71.11.2 Consulting architectural activities in interior design</td>
<td>401</td>
<td>485</td>
<td>594</td>
<td>634</td>
<td>662</td>
</tr>
<tr>
<td></td>
<td>73.11 Advertising agencies (50% share)</td>
<td>12,132</td>
<td>12,112</td>
<td>11,704</td>
<td>11,609</td>
<td>11,574</td>
</tr>
<tr>
<td></td>
<td>32.12 Manufacture of jewellery and related articles</td>
<td>2,216</td>
<td>2,531</td>
<td>2,686</td>
<td>2,780</td>
<td>3,016</td>
</tr>
<tr>
<td></td>
<td>74.20.1 Photographers</td>
<td>1,102</td>
<td>1,179</td>
<td>1,160</td>
<td>1,209</td>
<td>1,211</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>17,595</td>
<td>18,243</td>
<td>18,353</td>
<td>18,535</td>
<td>18,931</td>
</tr>
<tr>
<td>8. Architecture market</td>
<td>71.11.1 Consulting architectural activities in building construction</td>
<td>5,821</td>
<td>5,765</td>
<td>6,126</td>
<td>6,117</td>
<td>6,380</td>
</tr>
<tr>
<td></td>
<td>71.11.2 Consulting architectural activities in interior design</td>
<td>401</td>
<td>485</td>
<td>594</td>
<td>634</td>
<td>662</td>
</tr>
<tr>
<td></td>
<td>71.11.3 Consulting architectural activities in town, city and regional planning</td>
<td>1,022</td>
<td>1,066</td>
<td>1,239</td>
<td>1,288</td>
<td>1,343</td>
</tr>
<tr>
<td></td>
<td>71.11.4 Consulting architectural activities in landscape architecture</td>
<td>571</td>
<td>543</td>
<td>565</td>
<td>586</td>
<td>611</td>
</tr>
<tr>
<td></td>
<td>90.03.4 Own-account restorers</td>
<td>151</td>
<td>171</td>
<td>183</td>
<td>188</td>
<td>205</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>7,967</td>
<td>8,031</td>
<td>8,708</td>
<td>8,813</td>
<td>9,201</td>
</tr>
<tr>
<td>9. Press market</td>
<td>90.03.5 Own-account journalists and press photographers</td>
<td>1,208</td>
<td>1,219</td>
<td>1,258</td>
<td>1,223</td>
<td>1,248</td>
</tr>
<tr>
<td></td>
<td>63.91 News agency activities</td>
<td>516</td>
<td>513</td>
<td>522</td>
<td>497</td>
<td>580</td>
</tr>
<tr>
<td></td>
<td>58.12 Publishing of directories and mailing lists</td>
<td>1,369</td>
<td>1,415</td>
<td>1,762</td>
<td>1,875</td>
<td>1,841</td>
</tr>
<tr>
<td></td>
<td>58.13 Publishing of newspapers</td>
<td>10,930</td>
<td>11,183</td>
<td>11,501</td>
<td>11,781</td>
<td>11,569</td>
</tr>
<tr>
<td></td>
<td>58.14 Publishing of journals and periodicals</td>
<td>9,918</td>
<td>9,933</td>
<td>9,829</td>
<td>9,934</td>
<td>9,755</td>
</tr>
<tr>
<td></td>
<td>58.19 Other publishing activities (excluding software)</td>
<td>3,996</td>
<td>3,785</td>
<td>3,458</td>
<td>3,197</td>
<td>3,140</td>
</tr>
<tr>
<td></td>
<td>47.62 Retail sale of newspapers and stationery</td>
<td>3,403</td>
<td>3,351</td>
<td>3,381</td>
<td>3,422</td>
<td>3,411</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>31,341</td>
<td>31,398</td>
<td>31,711</td>
<td>31,931</td>
<td>31,545</td>
</tr>
<tr>
<td>10. Advertising market</td>
<td>73.11 Advertising agencies</td>
<td>24,264</td>
<td>24,223</td>
<td>23,407</td>
<td>23,217</td>
<td>23,148</td>
</tr>
<tr>
<td></td>
<td>73.12 Media representation</td>
<td>1,244</td>
<td>1,491</td>
<td>1,522</td>
<td>1,748</td>
<td>1,743</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>25,508</td>
<td>25,714</td>
<td>24,929</td>
<td>24,965</td>
<td>24,890</td>
</tr>
<tr>
<td>11. Software and games industry</td>
<td>58.21 Publishing of computer games</td>
<td>4,135</td>
<td>3,040</td>
<td>2,327</td>
<td>1,743</td>
<td>1,705</td>
</tr>
<tr>
<td></td>
<td>63.12 Web portals</td>
<td>324</td>
<td>477</td>
<td>559</td>
<td>661</td>
<td>680</td>
</tr>
<tr>
<td></td>
<td>62.01.1 Web-page design and programming</td>
<td>2,530</td>
<td>2,732</td>
<td>3,055</td>
<td>3,179</td>
<td>3,399</td>
</tr>
<tr>
<td></td>
<td>62.01.9 Other software development</td>
<td>17,034</td>
<td>19,818</td>
<td>21,997</td>
<td>23,663</td>
<td>25,295</td>
</tr>
<tr>
<td></td>
<td>58.29 Other software publishing</td>
<td>272</td>
<td>429</td>
<td>504</td>
<td>396</td>
<td>387</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>24,296</td>
<td>26,496</td>
<td>28,442</td>
<td>29,642</td>
<td>31,466</td>
</tr>
</tbody>
</table>
Table 6.7: Turnover (in EUR m) in the culture and creative industries according to submarkets and categories of economic activity

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Other</td>
<td>Libraries and archives</td>
<td>63</td>
<td>66</td>
<td>48</td>
<td>43</td>
<td>35</td>
</tr>
<tr>
<td></td>
<td>Operation of historical sites and buildings and similar visitor attractions</td>
<td>39</td>
<td>32</td>
<td>36</td>
<td>35</td>
<td>33</td>
</tr>
<tr>
<td></td>
<td>Botanical and zoological gardens and nature reserves</td>
<td>244</td>
<td>267</td>
<td>283</td>
<td>288</td>
<td>307</td>
</tr>
<tr>
<td>74.30.2</td>
<td>Interpretation activities</td>
<td>428</td>
<td>462</td>
<td>495</td>
<td>509</td>
<td>544</td>
</tr>
<tr>
<td>74.20.2</td>
<td>Photographic laboratories</td>
<td>567</td>
<td>518</td>
<td>503</td>
<td>449</td>
<td>450</td>
</tr>
<tr>
<td>32.11</td>
<td>Striking of coins</td>
<td>128</td>
<td>118</td>
<td>159</td>
<td>147</td>
<td>136</td>
</tr>
<tr>
<td>32.12</td>
<td>Manufacture of imitation jewellery</td>
<td>110</td>
<td>125</td>
<td>128</td>
<td>117</td>
<td>126</td>
</tr>
<tr>
<td>Submarket total</td>
<td></td>
<td>1,578</td>
<td>1,588</td>
<td>1,652</td>
<td>1,587</td>
<td>1,659</td>
</tr>
<tr>
<td>Total, including double counts</td>
<td></td>
<td>151,080</td>
<td>154,327</td>
<td>157,960</td>
<td>160,385</td>
<td>162,561</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td></td>
<td>16,751</td>
<td>16,993</td>
<td>16,990</td>
<td>17,047</td>
<td>17,277</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td></td>
<td>134,329</td>
<td>137,333</td>
<td>140,970</td>
<td>143,338</td>
<td>145,285</td>
</tr>
</tbody>
</table>

**Contribution of culture and creative industries** 2.74% 2.62% 2.48% 2.49% 2.36%

Note: *Data for 2013 estimated, based on previous year’s developments and economic statistics.
Source: Turnover tax statistics, Destatis 2014; ZEW’s own computations.

Table 6.8: Number of employed persons in the culture and creative industries according to submarkets and categories of economic activity from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Music industry</td>
<td>Own-account composers, etc.</td>
<td>2,838</td>
<td>2,818</td>
<td>2,864</td>
<td>2,882</td>
<td>2,890</td>
</tr>
<tr>
<td></td>
<td>Ballet companies, orchestras, bands and choirs</td>
<td>7,333</td>
<td>6,811</td>
<td>6,312</td>
<td>5,792</td>
<td>5,758</td>
</tr>
<tr>
<td>59.20.1</td>
<td>Sound-recording studios, etc.</td>
<td>1,383</td>
<td>1,403</td>
<td>1,448</td>
<td>1,513</td>
<td>1,580</td>
</tr>
<tr>
<td>59.20.2</td>
<td>Publishing of sound recordings</td>
<td>2,679</td>
<td>2,549</td>
<td>2,666</td>
<td>2,585</td>
<td>1,875</td>
</tr>
<tr>
<td>59.20.3</td>
<td>Publishing of printed music</td>
<td>2,909</td>
<td>3,199</td>
<td>3,095</td>
<td>2,693</td>
<td>2,717</td>
</tr>
<tr>
<td>90.04.1</td>
<td>Organisation of theatre performances and concerts</td>
<td>6,344</td>
<td>6,364</td>
<td>6,385</td>
<td>6,591</td>
<td>8,413</td>
</tr>
<tr>
<td>90.04.2</td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>3,446</td>
<td>3,491</td>
<td>3,553</td>
<td>3,596</td>
<td>3,574</td>
</tr>
<tr>
<td>90.02</td>
<td>Support activities to performing arts</td>
<td>5,521</td>
<td>5,828</td>
<td>6,145</td>
<td>6,621</td>
<td>6,757</td>
</tr>
<tr>
<td>47.59.3</td>
<td>Retail sale of musical instruments, etc.</td>
<td>6,108</td>
<td>6,169</td>
<td>6,232</td>
<td>6,291</td>
<td>6,243</td>
</tr>
<tr>
<td>47.63</td>
<td>Retail sale of music and video recordings, etc.</td>
<td>1,632</td>
<td>1,662</td>
<td>1,627</td>
<td>1,590</td>
<td>1,348</td>
</tr>
<tr>
<td>32.20</td>
<td>Manufacture of musical instruments</td>
<td>6,620</td>
<td>6,396</td>
<td>6,300</td>
<td>6,378</td>
<td>6,341</td>
</tr>
<tr>
<td>Submarket total</td>
<td></td>
<td>46,813</td>
<td>46,690</td>
<td>46,627</td>
<td>46,532</td>
<td>47,495</td>
</tr>
</tbody>
</table>
## Table 6.8: Number of employed persons in the culture and creative industries according to submarkets and categories of economic activity from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Book market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.2</td>
<td>Own-account writers</td>
<td>6,980</td>
<td>7,292</td>
<td>7,522</td>
<td>7,735</td>
<td>8,053</td>
</tr>
<tr>
<td>74.30.1</td>
<td>Translation activities</td>
<td>4,664</td>
<td>4,692</td>
<td>4,960</td>
<td>5,160</td>
<td>5,411</td>
</tr>
<tr>
<td>58.11</td>
<td>Book publishing</td>
<td>25,801</td>
<td>24,803</td>
<td>25,418</td>
<td>25,261</td>
<td>25,489</td>
</tr>
<tr>
<td>47.61</td>
<td>Retail sale of books</td>
<td>28,514</td>
<td>27,923</td>
<td>29,938</td>
<td>29,151</td>
<td>28,589</td>
</tr>
<tr>
<td>47.79.2</td>
<td>Retail sale of second-hand books</td>
<td>809</td>
<td>775</td>
<td>765</td>
<td>752</td>
<td>753</td>
</tr>
<tr>
<td>18.14</td>
<td>Binding and related services</td>
<td>12,063</td>
<td>11,365</td>
<td>10,895</td>
<td>10,749</td>
<td>10,116</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>78,831</td>
<td>76,850</td>
<td>79,498</td>
<td>78,808</td>
<td>78,410</td>
</tr>
<tr>
<td>3. Art market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.3</td>
<td>Own-account visual artists</td>
<td>10,203</td>
<td>10,160</td>
<td>10,264</td>
<td>10,254</td>
<td>10,267</td>
</tr>
<tr>
<td>47.78.3</td>
<td>Retail sale of art, etc.</td>
<td>3,559</td>
<td>3,539</td>
<td>3,310</td>
<td>3,289</td>
<td>3,197</td>
</tr>
<tr>
<td>91.02</td>
<td>Museums activities</td>
<td>2,095</td>
<td>2,024</td>
<td>1,969</td>
<td>1,944</td>
<td>1,863</td>
</tr>
<tr>
<td>47.79.1</td>
<td>Retail sale of antiques, etc.</td>
<td>3,565</td>
<td>3,437</td>
<td>3,399</td>
<td>3,423</td>
<td>3,342</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>19,422</td>
<td>19,160</td>
<td>18,943</td>
<td>18,910</td>
<td>18,668</td>
</tr>
<tr>
<td>4. Film industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.01.4</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>8,988</td>
<td>9,263</td>
<td>9,717</td>
<td>10,173</td>
<td>10,548</td>
</tr>
<tr>
<td>59.11</td>
<td>Motion picture, video and TV programme production</td>
<td>26,143</td>
<td>25,491</td>
<td>25,502</td>
<td>26,109</td>
<td>25,520</td>
</tr>
<tr>
<td>59.12</td>
<td>Motion picture, video and TV programme post-production</td>
<td>5,617</td>
<td>5,384</td>
<td>5,576</td>
<td>4,999</td>
<td>4,984</td>
</tr>
<tr>
<td>59.13</td>
<td>Motion picture, video and TV programme distribution</td>
<td>3,422</td>
<td>3,291</td>
<td>3,182</td>
<td>2,946</td>
<td>2,943</td>
</tr>
<tr>
<td>59.14</td>
<td>Motion picture projection</td>
<td>8,771</td>
<td>8,581</td>
<td>8,691</td>
<td>8,696</td>
<td>8,796</td>
</tr>
<tr>
<td>47.63</td>
<td>Retail sale of music and video recordings, etc.</td>
<td>1,632</td>
<td>1,662</td>
<td>1,627</td>
<td>1,590</td>
<td>1,348</td>
</tr>
<tr>
<td>77.22</td>
<td>Renting of video tapes and disks</td>
<td>3,923</td>
<td>3,608</td>
<td>3,445</td>
<td>3,114</td>
<td>2,731</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>58,496</td>
<td>57,280</td>
<td>57,740</td>
<td>57,627</td>
<td>56,868</td>
</tr>
<tr>
<td>5. Broadcasting industry</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.5</td>
<td>Own-account journalists and press photographers</td>
<td>18,449</td>
<td>18,273</td>
<td>18,644</td>
<td>18,712</td>
<td>18,810</td>
</tr>
<tr>
<td>60.10</td>
<td>Radio broadcasting</td>
<td>13,517</td>
<td>13,601</td>
<td>13,741</td>
<td>13,437</td>
<td>14,016</td>
</tr>
<tr>
<td>60.20</td>
<td>Television programming and broadcasting</td>
<td>6,924</td>
<td>7,007</td>
<td>7,305</td>
<td>7,718</td>
<td>8,658</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>38,890</td>
<td>38,881</td>
<td>39,690</td>
<td>39,867</td>
<td>41,483</td>
</tr>
<tr>
<td>6. Performing arts market</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.01.4</td>
<td>Own-account stage, motion picture, radio and TV artists, etc.</td>
<td>8,988</td>
<td>9,263</td>
<td>9,717</td>
<td>10,173</td>
<td>10,548</td>
</tr>
<tr>
<td>90.01.3</td>
<td>Own-account performers and circus groups</td>
<td>1,292</td>
<td>1,286</td>
<td>1,262</td>
<td>1,106</td>
<td>1,151</td>
</tr>
<tr>
<td>90.01.1</td>
<td>Theatre ensembles</td>
<td>1,240</td>
<td>1,340</td>
<td>1,214</td>
<td>1,214</td>
<td>1,214</td>
</tr>
<tr>
<td>90.04.1</td>
<td>Organisation of theatre performances and concerts</td>
<td>6,344</td>
<td>6,364</td>
<td>6,385</td>
<td>6,591</td>
<td>8,413</td>
</tr>
<tr>
<td>90.04.2</td>
<td>Operation of opera houses, theatre and concert halls, etc.</td>
<td>3,446</td>
<td>3,491</td>
<td>3,553</td>
<td>3,596</td>
<td>3,574</td>
</tr>
<tr>
<td>90.04.3</td>
<td>Operation of variety theatres and cabarets</td>
<td>925</td>
<td>940</td>
<td>923</td>
<td>929</td>
<td>970</td>
</tr>
<tr>
<td>90.02</td>
<td>Support activities to performing arts</td>
<td>5,521</td>
<td>5,828</td>
<td>6,145</td>
<td>6,621</td>
<td>6,757</td>
</tr>
<tr>
<td>85.52</td>
<td>Cultural education</td>
<td>4,538</td>
<td>4,708</td>
<td>4,913</td>
<td>5,153</td>
<td>5,410</td>
</tr>
<tr>
<td></td>
<td>Submarket total</td>
<td>32,295</td>
<td>33,220</td>
<td>34,112</td>
<td>35,383</td>
<td>37,013</td>
</tr>
</tbody>
</table>
### Table 6.8: Number of employed persons in the culture and creative industries according to submarkets and categories of economic activity from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7. Design industry</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>74.10.1</td>
<td>Industrial, product and fashion designers</td>
<td>3,332</td>
<td>4,247</td>
<td>4,871</td>
<td>5,641</td>
<td>6,642</td>
</tr>
<tr>
<td>74.10.2</td>
<td>Graphics and communications designers</td>
<td>8,362</td>
<td>10,338</td>
<td>12,254</td>
<td>14,242</td>
<td>16,417</td>
</tr>
<tr>
<td>74.10.3</td>
<td>Interior decorators</td>
<td>10,579</td>
<td>10,481</td>
<td>10,669</td>
<td>10,153</td>
<td>10,111</td>
</tr>
<tr>
<td>71.11.2</td>
<td>Consulting architectural activities in interior design</td>
<td>4,146</td>
<td>4,743</td>
<td>5,399</td>
<td>5,858</td>
<td>6,702</td>
</tr>
<tr>
<td>73.11</td>
<td>Advertising agencies (50% share)</td>
<td>67,095</td>
<td>64,754</td>
<td>65,542</td>
<td>65,960</td>
<td>65,584</td>
</tr>
<tr>
<td>32.12</td>
<td>Manufacture of jewellery and related articles</td>
<td>14,848</td>
<td>13,847</td>
<td>11,725</td>
<td>11,591</td>
<td>11,464</td>
</tr>
<tr>
<td>74.20.1</td>
<td>Photographers</td>
<td>17,064</td>
<td>17,444</td>
<td>17,955</td>
<td>18,295</td>
<td>18,608</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>125,426</td>
<td>125,854</td>
<td>128,415</td>
<td>131,740</td>
<td>135,528</td>
</tr>
<tr>
<td><strong>8. Architecture market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>71.11.1</td>
<td>Consulting architectural activities in building construction</td>
<td>74,640</td>
<td>75,298</td>
<td>77,324</td>
<td>79,464</td>
<td>81,678</td>
</tr>
<tr>
<td>71.11.2</td>
<td>Consulting architectural activities in interior design</td>
<td>4,146</td>
<td>4,743</td>
<td>5,399</td>
<td>5,858</td>
<td>6,702</td>
</tr>
<tr>
<td>71.11.3</td>
<td>Consulting architectural activities in town, city and regional planning</td>
<td>11,352</td>
<td>11,600</td>
<td>12,031</td>
<td>11,799</td>
<td>11,922</td>
</tr>
<tr>
<td>71.11.4</td>
<td>Consulting architectural activities in landscape architecture</td>
<td>7,034</td>
<td>7,314</td>
<td>7,393</td>
<td>7,617</td>
<td>7,827</td>
</tr>
<tr>
<td>90.03.4</td>
<td>Own-account restorers</td>
<td>2,892</td>
<td>2,934</td>
<td>2,932</td>
<td>2,999</td>
<td>2,954</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>100,064</td>
<td>101,889</td>
<td>105,079</td>
<td>107,737</td>
<td>111,083</td>
</tr>
<tr>
<td><strong>9. Press market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>90.03.5</td>
<td>Own-account journalists and press photographers</td>
<td>18,449</td>
<td>18,273</td>
<td>18,644</td>
<td>18,712</td>
<td>18,810</td>
</tr>
<tr>
<td>63.91</td>
<td>News agency activities</td>
<td>9,026</td>
<td>8,829</td>
<td>9,345</td>
<td>9,654</td>
<td>9,470</td>
</tr>
<tr>
<td>58.12</td>
<td>Publishing of directories and mailing lists</td>
<td>5,070</td>
<td>5,049</td>
<td>4,353</td>
<td>4,283</td>
<td>4,076</td>
</tr>
<tr>
<td>58.13</td>
<td>Publishing of newspapers</td>
<td>51,654</td>
<td>49,514</td>
<td>47,736</td>
<td>47,623</td>
<td>47,008</td>
</tr>
<tr>
<td>58.14</td>
<td>Publishing of journals and periodicals</td>
<td>43,449</td>
<td>41,340</td>
<td>40,657</td>
<td>38,775</td>
<td>38,089</td>
</tr>
<tr>
<td>58.19</td>
<td>Other publishing activities (excluding software)</td>
<td>11,518</td>
<td>11,264</td>
<td>11,545</td>
<td>11,197</td>
<td>10,986</td>
</tr>
<tr>
<td>47.62</td>
<td>Retail sale of newspapers and stationery</td>
<td>29,117</td>
<td>29,025</td>
<td>28,803</td>
<td>28,619</td>
<td>27,810</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>168,283</td>
<td>163,294</td>
<td>161,083</td>
<td>158,863</td>
<td>156,247</td>
</tr>
<tr>
<td><strong>10. Advertising market</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>73.11</td>
<td>Advertising agencies</td>
<td>134,189</td>
<td>129,508</td>
<td>131,084</td>
<td>131,920</td>
<td>131,168</td>
</tr>
<tr>
<td>73.12</td>
<td>Media representation</td>
<td>6,746</td>
<td>7,455</td>
<td>7,786</td>
<td>8,468</td>
<td>9,443</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>140,935</td>
<td>136,963</td>
<td>138,870</td>
<td>140,388</td>
<td>140,611</td>
</tr>
<tr>
<td><strong>11. Software and games industry</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>58.21</td>
<td>Publishing of computer games</td>
<td>1,190</td>
<td>1,517</td>
<td>1,826</td>
<td>1,961</td>
<td>1,583</td>
</tr>
<tr>
<td>63.12</td>
<td>Web portals</td>
<td>2,293</td>
<td>3,547</td>
<td>5,142</td>
<td>6,942</td>
<td>8,775</td>
</tr>
<tr>
<td>62.01.1</td>
<td>Web-page design and programming</td>
<td>25,558</td>
<td>29,470</td>
<td>34,531</td>
<td>38,320</td>
<td>40,507</td>
</tr>
<tr>
<td>62.01.9</td>
<td>Other software development</td>
<td>202,223</td>
<td>201,736</td>
<td>208,986</td>
<td>231,472</td>
<td>248,331</td>
</tr>
<tr>
<td>58.29</td>
<td>Other software publishing</td>
<td>12,489</td>
<td>15,406</td>
<td>17,920</td>
<td>20,662</td>
<td>22,074</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td>243,753</td>
<td>251,676</td>
<td>268,405</td>
<td>299,357</td>
<td>321,270</td>
</tr>
</tbody>
</table>
### Table 6.8: Number of employed persons in the culture and creative industries according to submarkets and categories of economic activity from 2009 to 2013

<table>
<thead>
<tr>
<th>Submarket WZ-2008</th>
<th>Category of economic activity</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013*</th>
</tr>
</thead>
<tbody>
<tr>
<td>12. Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>91.01</td>
<td>Libraries and archives</td>
<td>1,028</td>
<td>991</td>
<td>991</td>
<td>928</td>
<td>891</td>
</tr>
<tr>
<td>91.03</td>
<td>Operation of historical sites and buildings and similar visitor attractions</td>
<td>220</td>
<td>210</td>
<td>223</td>
<td>226</td>
<td>224</td>
</tr>
<tr>
<td>91.04</td>
<td>Botanical and zoological gardens and nature reserves</td>
<td>772</td>
<td>774</td>
<td>792</td>
<td>808</td>
<td>801</td>
</tr>
<tr>
<td>74.30.2</td>
<td>Interpretation activities</td>
<td>6,419</td>
<td>6,645</td>
<td>6,930</td>
<td>7,127</td>
<td>7,351</td>
</tr>
<tr>
<td>74.20.2</td>
<td>Photographic laboratories</td>
<td>5,608</td>
<td>5,045</td>
<td>4,863</td>
<td>4,943</td>
<td>4,997</td>
</tr>
<tr>
<td>32.11</td>
<td>Striking of coins</td>
<td>465</td>
<td>468</td>
<td>482</td>
<td>511</td>
<td>524</td>
</tr>
<tr>
<td>32.13</td>
<td>Manufacture of imitation jewellery</td>
<td>832</td>
<td>857</td>
<td>903</td>
<td>891</td>
<td>875</td>
</tr>
<tr>
<td><strong>Submarket total</strong></td>
<td></td>
<td><strong>15,345</strong></td>
<td><strong>14,991</strong></td>
<td><strong>15,184</strong></td>
<td><strong>15,434</strong></td>
<td><strong>15,662</strong></td>
</tr>
<tr>
<td>Total, including double counts</td>
<td></td>
<td>1,068,553</td>
<td>1,066,748</td>
<td>1,093,644</td>
<td>1,130,646</td>
<td>1,160,337</td>
</tr>
<tr>
<td>Duplicate categories of economic activity</td>
<td></td>
<td>115,621</td>
<td>114,378</td>
<td>117,012</td>
<td>119,101</td>
<td>121,735</td>
</tr>
<tr>
<td>Culture and creative industries (excluding double counts)</td>
<td></td>
<td><strong>952,932</strong></td>
<td><strong>952,370</strong></td>
<td><strong>976,633</strong></td>
<td><strong>1,011,544</strong></td>
<td><strong>1,038,601</strong></td>
</tr>
<tr>
<td>Contribution of culture and creative industries</td>
<td></td>
<td>3.10%</td>
<td>3.06%</td>
<td>3.07%</td>
<td>3.11%</td>
<td>3.16%</td>
</tr>
</tbody>
</table>

Note: *Data for 2013 estimated (number of self-employed persons), based on the previous year’s developments and economic statistics.

6.2 Bibliography

Bundesagentur für Arbeit (2014), Beschäftigungsstatistik, various years, Nuremberg.


Destatis/Statistisches Bundesamt (2014), Mikrozensus, various years, Wiesbaden.


Destatis/Statistisches Bundesamt (2014), Umsatzsteuerstatistik, various years, Wiesbaden.

Wirtschaftsministerkonferenz (2009), Leitfaden zur Erstellung einer statistischen Datengrundlage für die Kulturwirtschaft und eine länderübergreifende Auswertung kulturwirtschaftlicher Daten.