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Federal Government Commissioner
for Culture and the Media

Cultural and Creative Industries
Initiative of the
Federal Government

# 2020 Cultural and Creative Industries Monitoring Report

*Summary*

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# About the monitoring process

*On behalf of the Federal Ministry for Economic Affairs and Energy, Goldmedia GmbH, Hamburg Media School (HMS) and Prof rer. oec. Rüdiger Wink (HTWK Leipzig) have assessed the key economic indicators of the cultural and creative industries for the purpose of compiling the 2020 Cultural and Creative Industries Monitoring Report.*

*The present study is an update of the annual monitoring report which looks at the state and the prospects of the cultural and creative industries in Germany each year. For reasons of continuity, the research community has relied on existing data and methods to ensure coherence with the studies of previous years. The present publication is the summary of the report and was published in October 2020. The unabridged version is to be released in November 2020.*

## Market Analysis

**Markets covered**

The cultural and creative industries examined in the report are music, books, art, film, broadcasting, performing arts, design, architecture, press, advertising, software/games. The twelfth area entitled 'other' includes industries which could not be assigned to one of these eleven submarkets of the cultural and creative industries (e.g. photography labs or freelance interpreters).

**Sources**

The data underlying this study has been taken from the following and other official statistics:

- VAT statistics by the Federal Statistical Office (Destatis) (advance VAT returns up until 2018, VAT assessments up until 2015)
- National Accounts by the Federal Statistical Office (mostly up until 2017)
- Employment statistics by the Federal Employment Agency (up until 2019)

Assessments on trends and challenges and quotations regarding the current situation on a particular market have been collected in writing from a number of selected industry associations for the individual submarkets.

## Key indicators and forecasts

**Key indicators 2009 – 2019**

Turnover, number of businesses, gross value added, core workforce, employees subject to social security contributions, persons in marginal employment, self-employed persons with mini-jobs

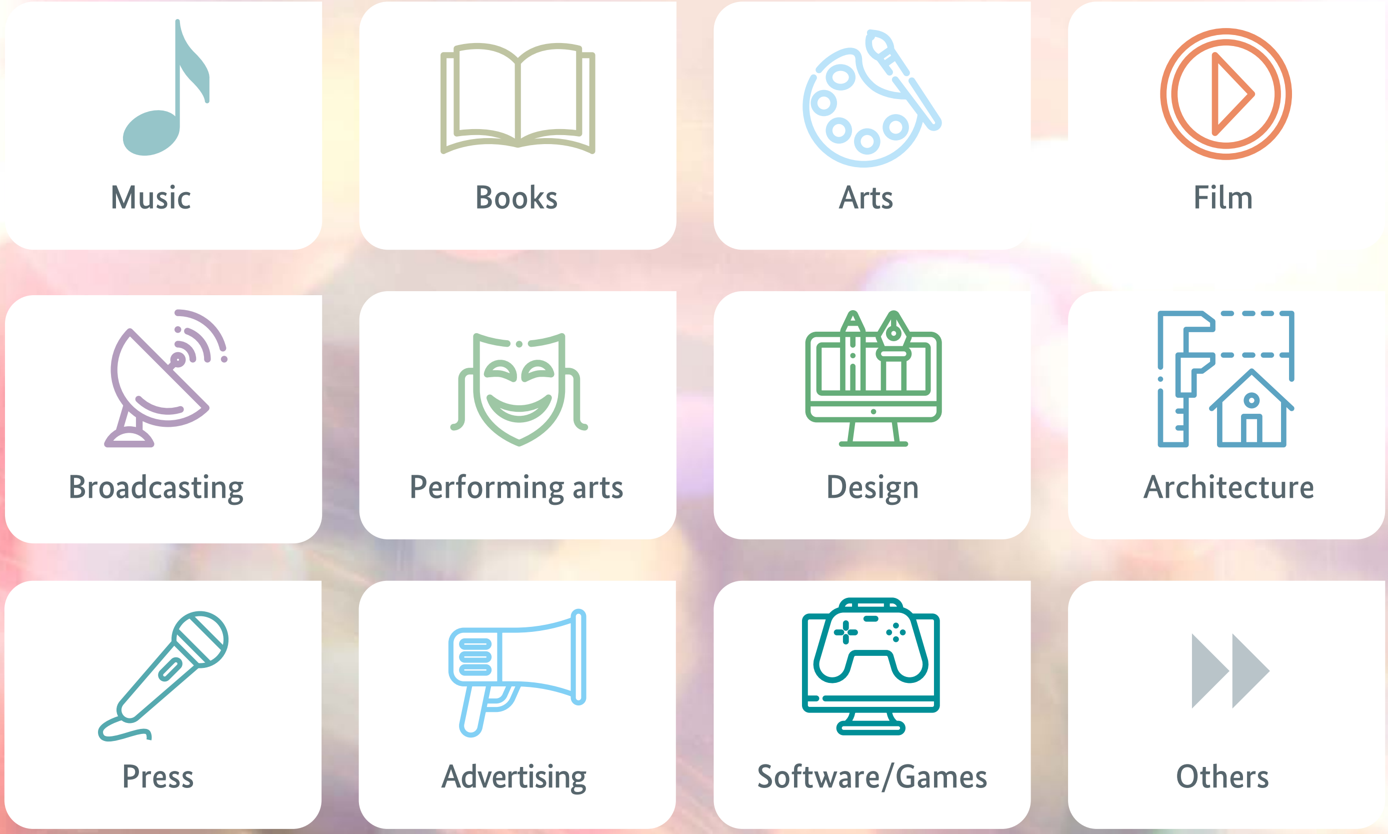
**Forecast 2019**

The preliminary official results on key economic indicators for businesses and self-employed persons are based on the VAT statistics and the National Accounts and are available for the years up until 2018. For 2019, we conducted our own forecast, which is based on previous growth rates.

**Turnover forecast for 2020**

A turnover forecast for 2020 was conducted for each submarket of the cultural and creative industries. This forecast is based on the scenarios developed by the Federal Government's Centre of Excellence for the Cultural and Creative Industries in its publication entitled „Betroffenheit der Kultur- und Kreativwirtschaft von der Corona-Pandemie" (Impact of the Covid-19 pandemic on the cultural and creative industries) of 21 April 2020.

# Submarkets of the cultural and creative industries




# Key facts for the cultural and creative industries in 2019

**€174.1**
billion turnover

**299,467**
Persons in marginal employment

**599,511**
Persons in marginal (self-)employment

**3.1%**
Share in GDP

**€106.4**
billion gross value added

**€140,872**
Turnover per core worker

**1,235,767**
Core workforce

**1,835,278**
Total workforce

**€86,099**
Gross value added per core worker

**4.78**
Core workers per business

**976,977**
Employees subject to social security contributions

**258,790**
Businesses

**300,044**
Self-employed persons with mini-jobs

**20.9%**
Share of self-employed persons

(in core work-force)

**€672,688**
Turnover per business

**Up to -24%**
Turnover forecast 2020*

Source: In-house calculations by Goldmedia based on Destatis 2020a,b,c; Federal Employment Agency 2020;
*2020 forecast based on the 2020 scenarios developed by the Federal Government's Centre of Excellence for the Cultural and Creative Industries of 21 April 2020

# Key data on the cultural and creative industries in 2019

*Turnover, businesses, workforce, gross value added, 2020 forecast*

## Key economic data on the cultural and creative industries in 2019

**Turnover broken down by submarket (in € billion, 2019)**


Total turnover:

**€174.1 BN**

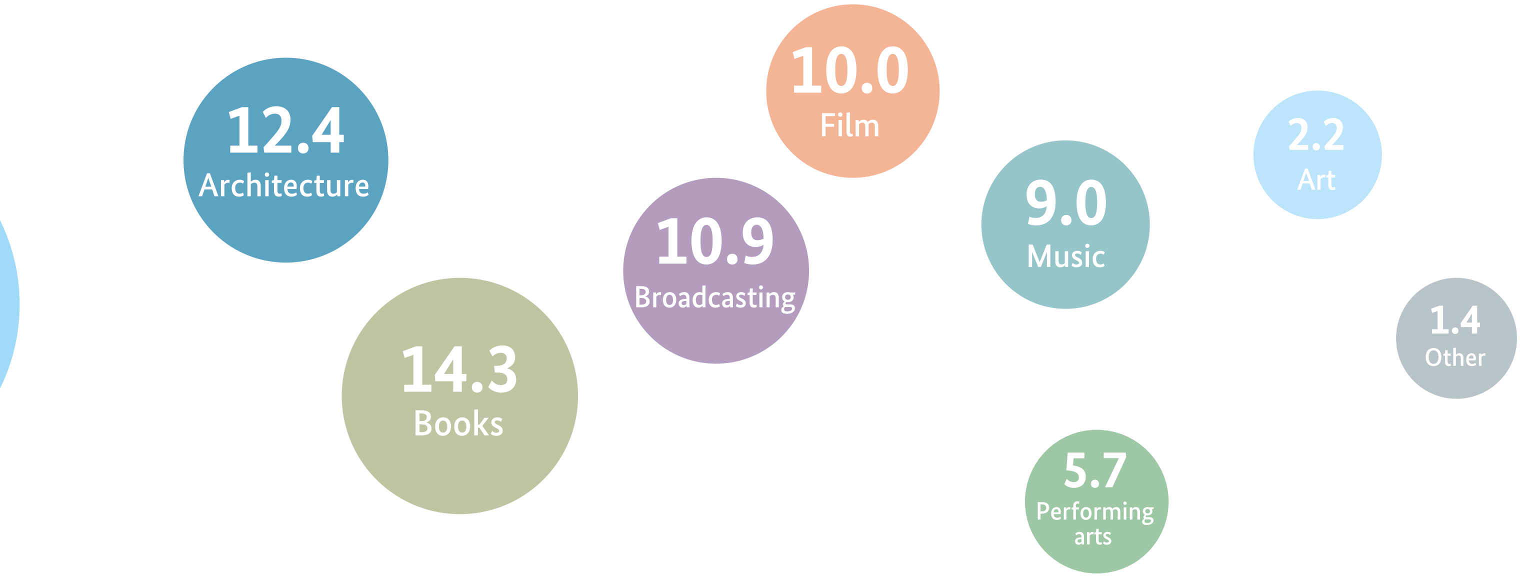
Gross value added:

**€106.4 BN**

Share in GDP:

**3.1 %**

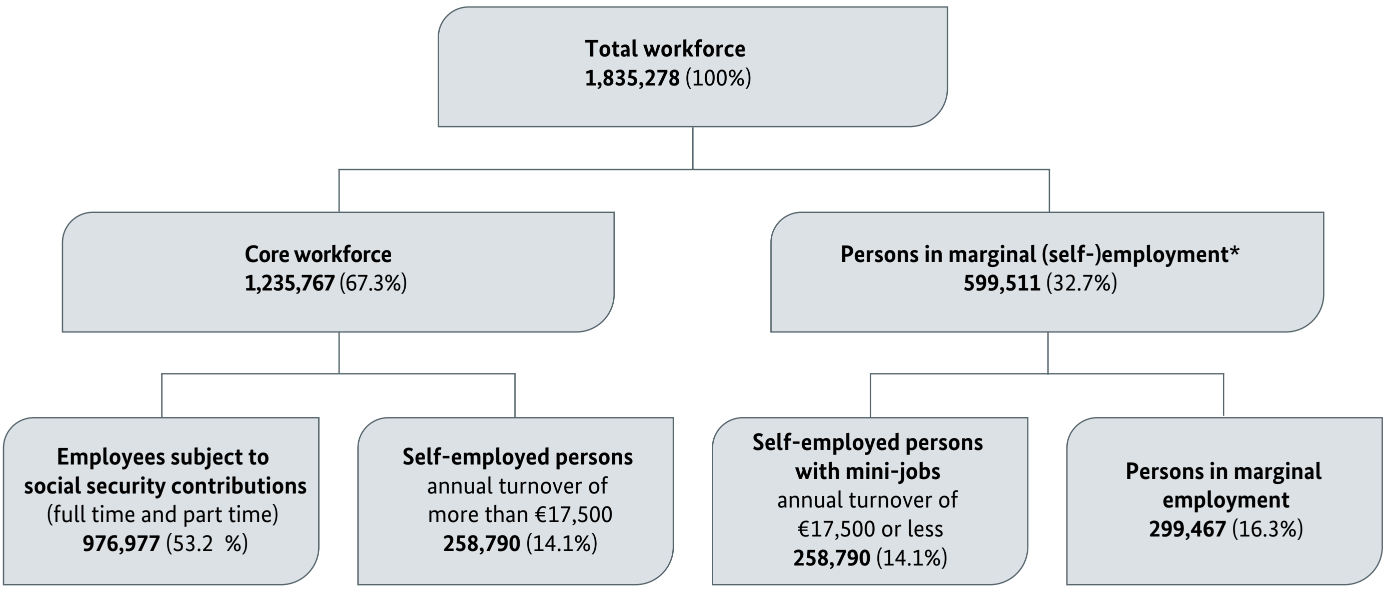
Source: In-house calculations by Goldmedia; based on: Destatis 2020a,c. Image by: Joyce McCown/Unsplash.Total numbers do not correspond to total of individual submarkets as these partly overlap.




## Employment in the cultural and creative industries in 2019

Around 1.8 million people worked in Germany's cultural and creative industries in 2019. The majority were employees subject to social security contributions (53%), 14% worked as freelancers or were self-employed (annual turnover of more than €17,500). 16% were persons in marginal employment or self-employed persons with mini-jobs (annual turnover of €17,500 or less).

### Cultural and creative industries workforce by type of employment in 2019



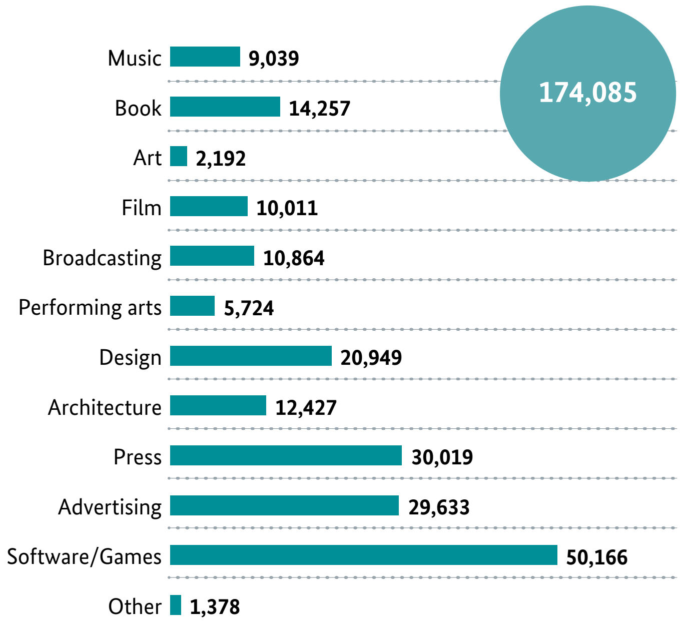

Source: Federal Employment Agency 2020; in-house calculations by Goldmedia, *persons in marginal (self-)employment include persons in marginal employment and, in deviation from previous studies, self-employed persons with mini-jobs. The category of 'marginally self-employed persons', which is based on the Federal Statistical Office's microcensus, is no longer used. Discrepancies possible due to rounding.

## Cultural and creative industries submarkets in 2019: Key economic indicators

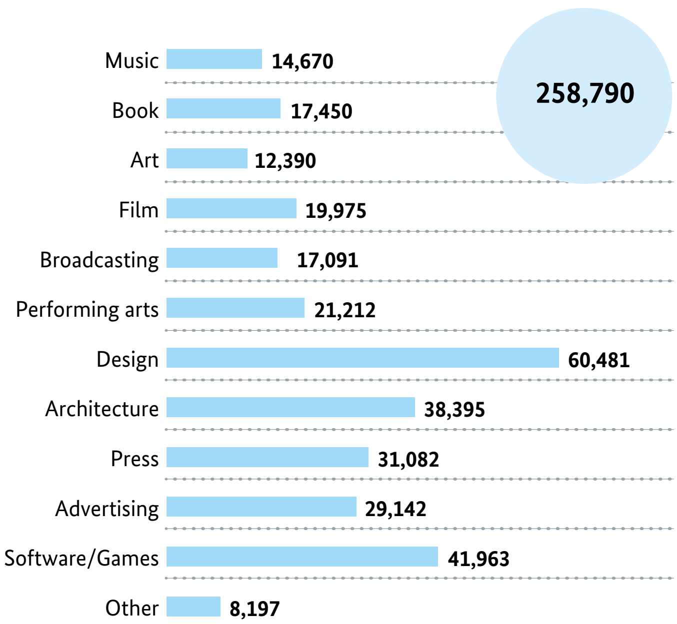
In terms of turnover, the software/games industry was by far the largest submarket of the German cultural and creative industries in 2019. It generated more than €50 billion – around one quarter of the turnover of the entire sector – and also had the highest gross value added. The press and advertising market came in second and third, with around €30 billion in turnover each.

At 60,000, the design industry has the highest number of businesses (including sole proprietorships), followed by the software/games industry and the architecture market. This corroborates the assumption that a large number of self-employed persons work in the design industry.

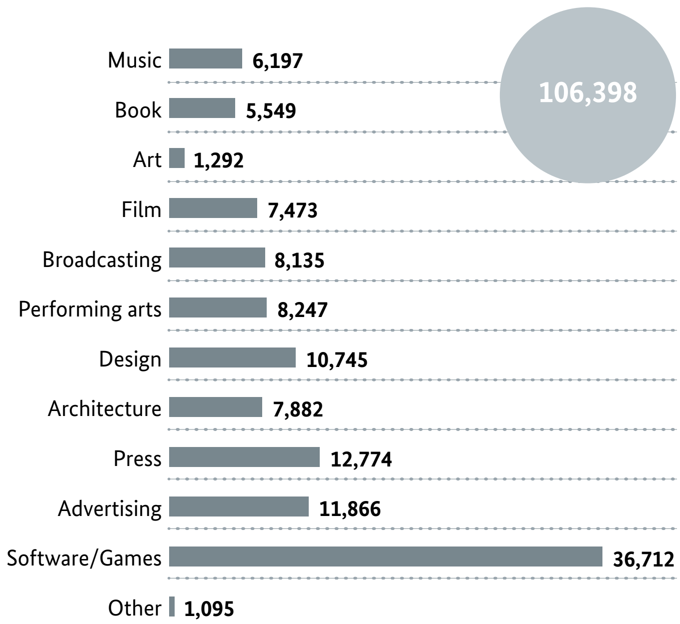
### Turnover (in € million)




### Number of businesses




### Gross value added (in € million)



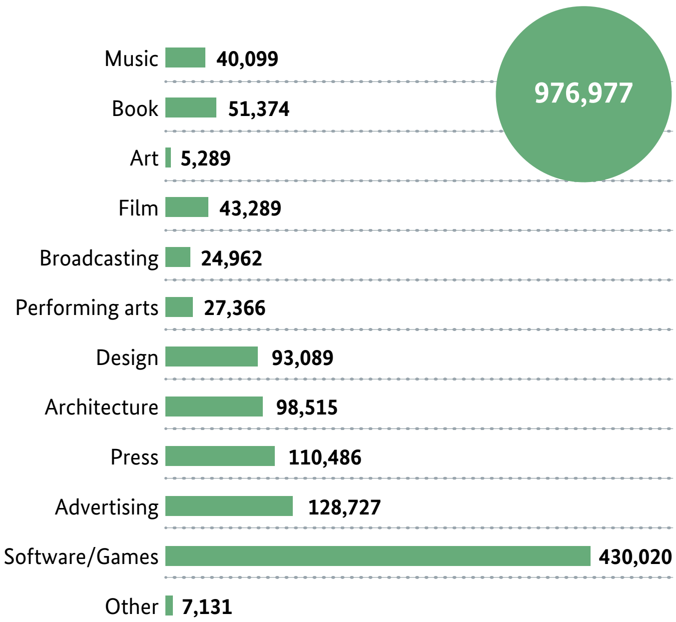

Source: In-house calculations by Goldmedia, based on: Destatis 2020 (Classification of Economic Activities, WZ 2008); Total numbers do not correspond to total of individual submarkets as these partly overlap.

## Cultural and creative industries submarkets in 2019: Employment

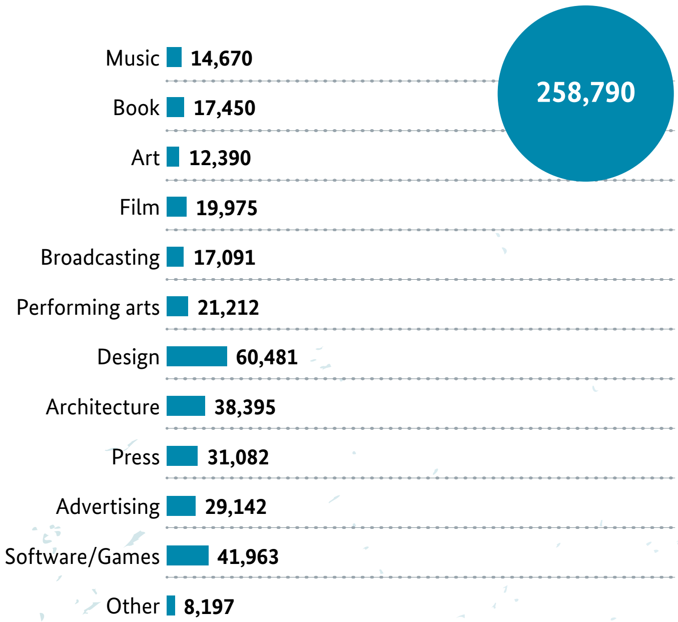
The software/games industry has by far the highest number of employees subject to social security contributions (430,020). Advertising has the highest number of persons in marginal employment (94,676).

The design industry has the highest number of self-employed persons, both in the category of those earning more than €17,500 a year and those earning €17,500 or less (self-employed persons with mini-jobs).

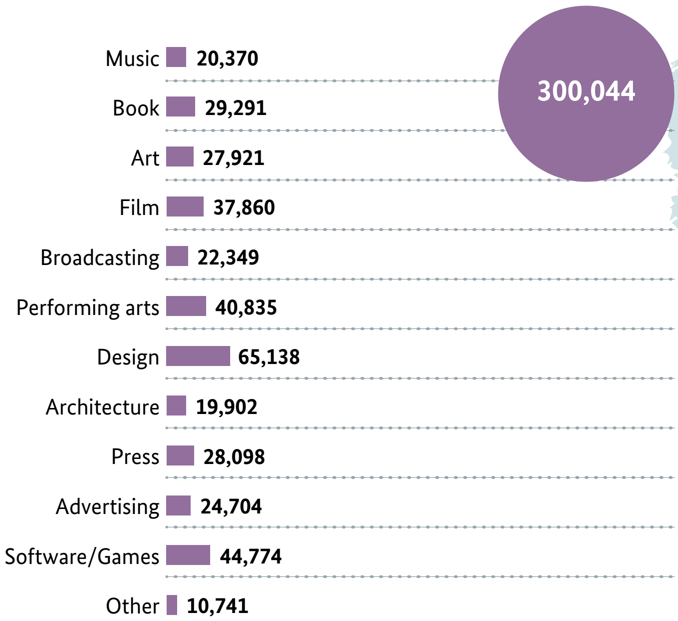
### Employees subject to social security contributions



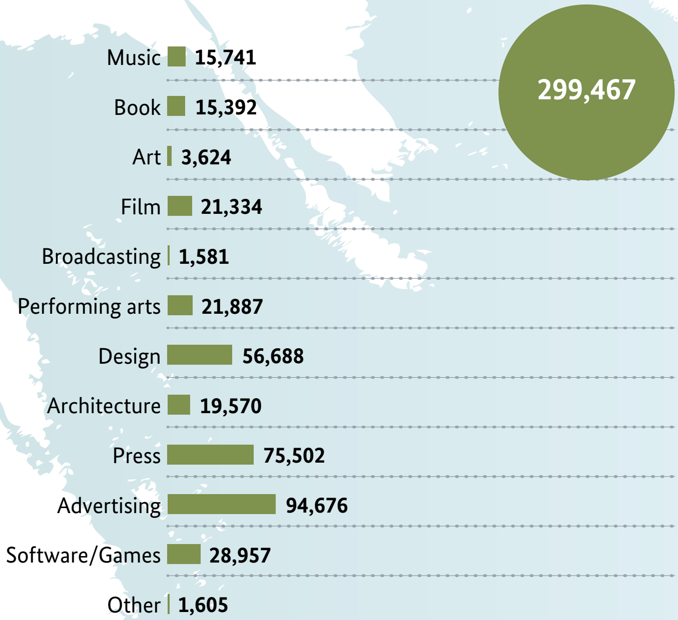

### Self-employed persons (annual turnover >€17,500)




### Self-employed persons with mini-jobs (annual turnover ≤17,500€)




### Persons in marginal employment



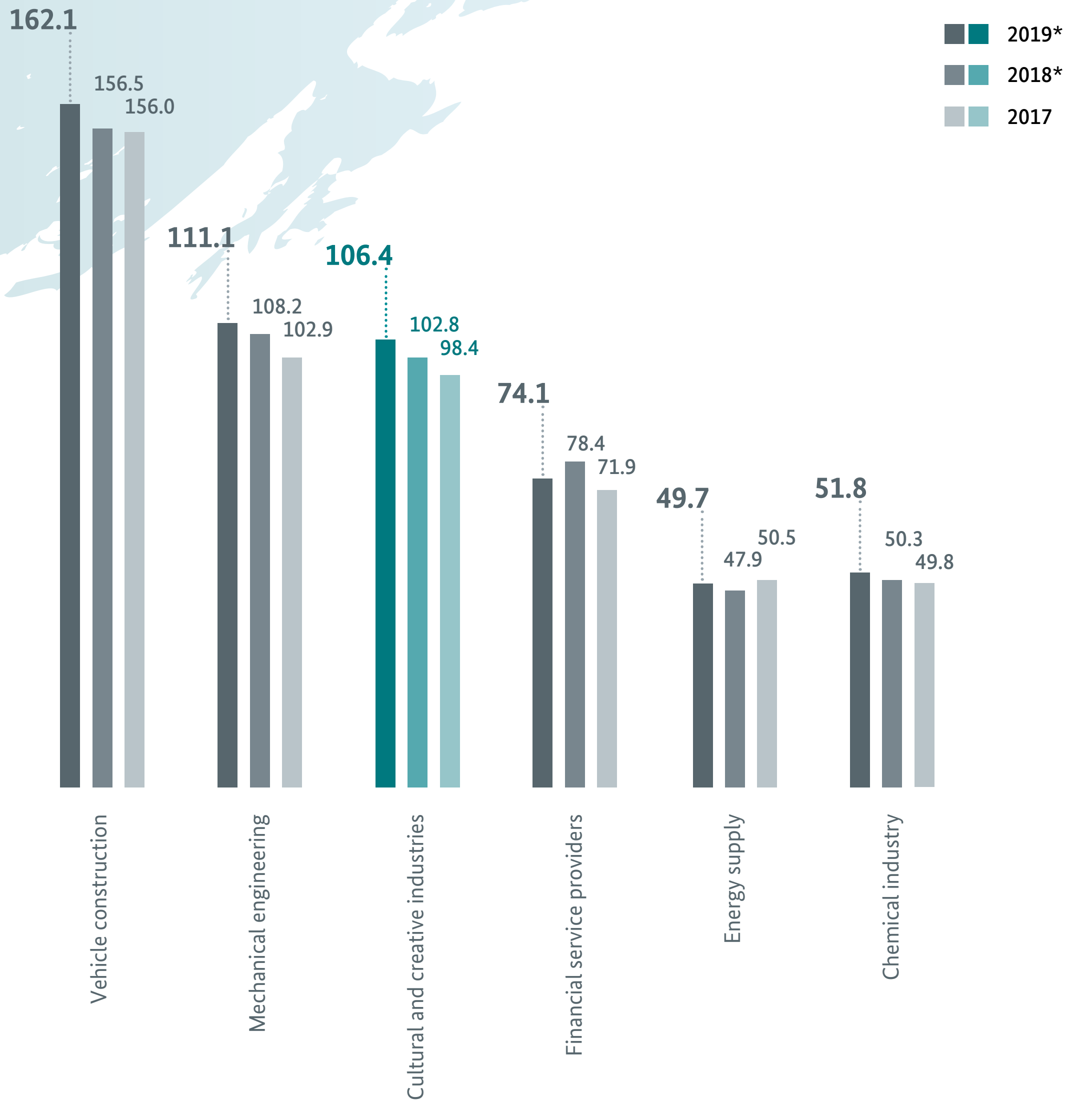

Source: Federal Employment Agency 2020; in-house calculations by Goldmedia, based on: Destatis 2020a,b (Classification of Economic Activities, WZ 2008); Total numbers do not correspond to total of individual submarkets as these partly overlap..

## The cultural and creative industries – industry benchmark

Gross value added (GVA) is the key indicator reflecting the value added by production and product and service creation. It is the total value of the goods and services produced, less the value of the inputs used.

In 2019, GVA in the creative industries was around €106.4 billion. It thus grew by around €3.6 billion or 3.5% compared with the previous year. The creative industries are thus roughly on a par with mechanical engineering and ahead of other sectors such as financial services, energy supply and the chemical industry.

### Contribution of the cultural and creative industries to gross value added compared with other industries, 2017 – 2019* (in € billion)



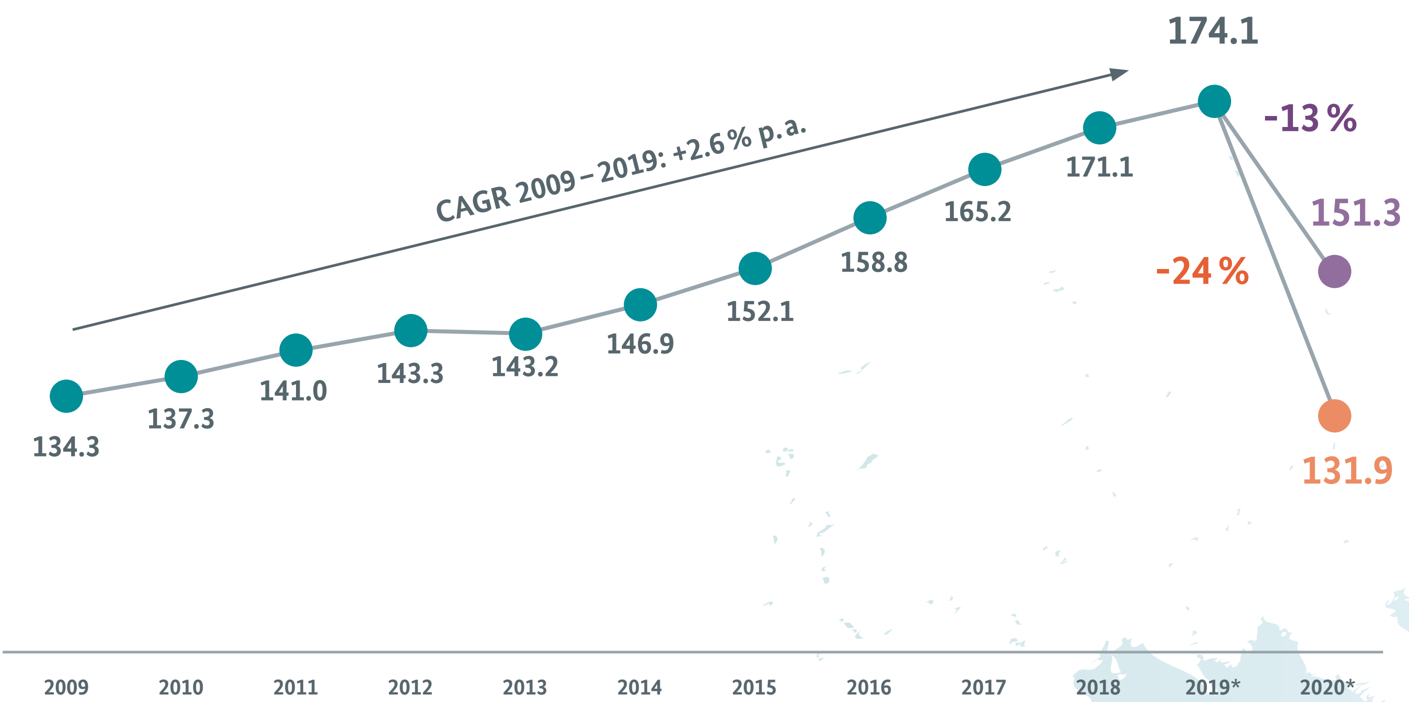

Source: National Accounts, Destatis 2020d, VAT statistics, Destatis 2020a; in-house calculations by Goldmedia.
Gross value added based on National Accounts figures, calculated for the CCIs based on the distribution of turnover in the VAT statistics,
*some of the figures for 2018 and 2019 are estimates

## Cultural and creative industries total turnover 2009 – 2020

Turnover in the cultural and creative industries grew by €40 billion in the last ten years, reaching a total of €174.1 billion in 2019. This corresponds to an average annual growth rate (CAGR) of 2.6%.

Due to the Covid-19 pandemic, this positive trend will not continue: significant revenue losses are expected for 2020. According to a scenario analysis (source: Federal Government Centre of Excellence for the Cultural and Creative Industries), revenues could fall by around €23 bn (-13%) under the middle scenario**, whilst under the severe scenario** losses of more than €42 billion (-24%) are expected.

### Cultural and creative industries total turnover 2009 – 2020* (in € billion)




**Middle scenario:** “This scenario assumes that the severe restrictions imposed on business activities will continue until August and that, following this, the economy will slowly start to recover.”

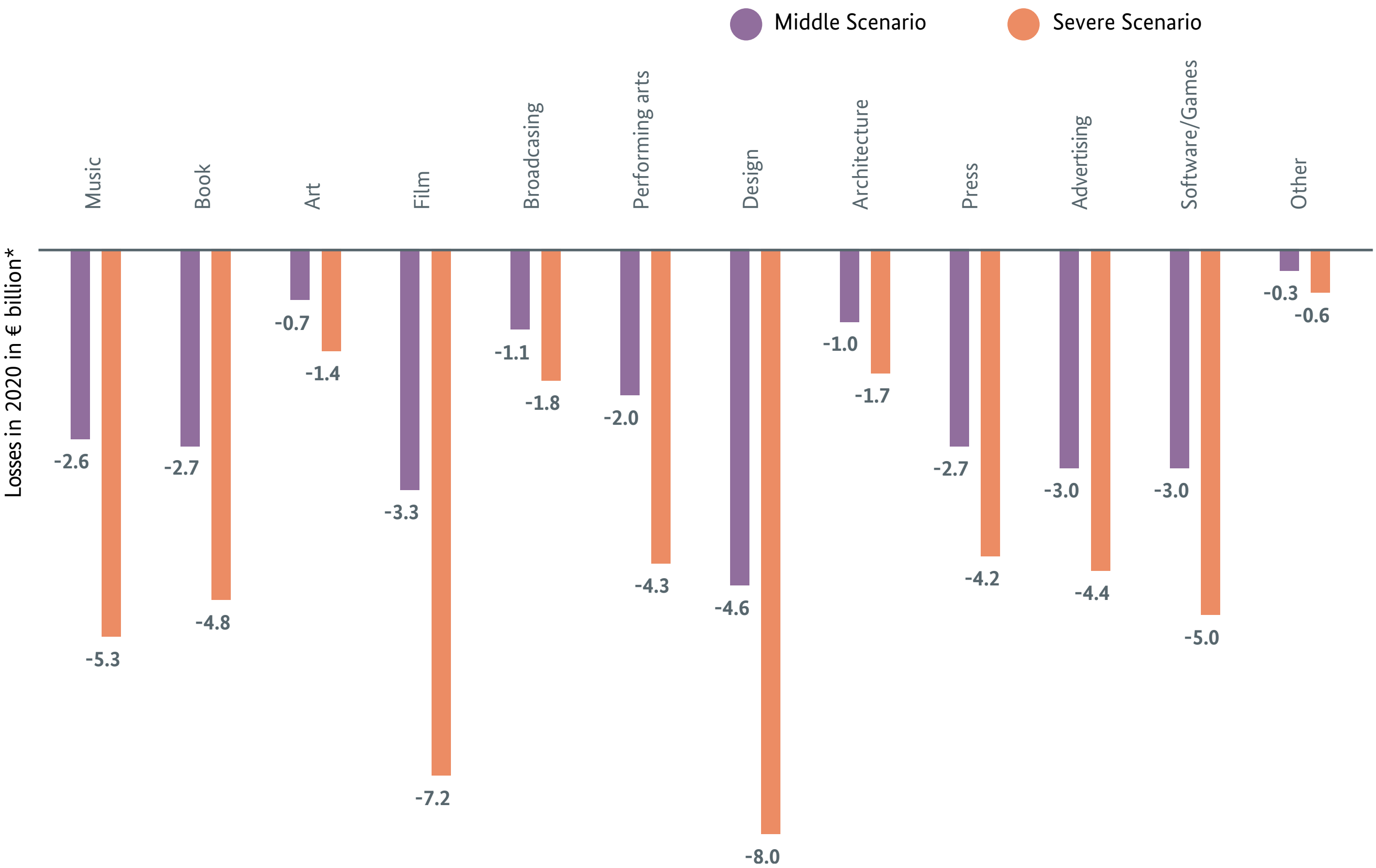
**Severe scenario:** “This scenario expects that the severe restrictions imposed on economic life will continue until the end of the year. This scenario could materialise if there is a new wave infection which results in another lockdown.”

National Accounts, Destatis 2020d, VAT statistics, Destatis 2020a; in-house calculations by Goldmedia.
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government’s Centre of Excellence for the Cultural and Creative Industries of 21 April 2020;
**A more detailed description of the scenarios can be found in the methodological notes in the Annex, source: VAT statistics, Destatis2020a; in-house calculations by Goldmedia.

## Impact of the pandemic on turnover in 2020

The submarkets of the cultural and creative industries have been affected to varying degrees by the Covid-19 pandemic. Under the middle scenario, the industries are expected to lose between -6% and -36% of their turnover, whilst the severe scenario predicts losses of -10% to -75%. Whilst particularly high losses are expected for the performing arts, film, arts and music, submarkets such as architecture, press and software/games are likely to be much more resilient.

### Losses in turnover in the cultural and creative industries due to the Covid-19 pandemic in 2020 compared with 2019* broken down by submarket (in € billion)




| | Music | Book | Art | Film | Broad-casting | Per-forming arts | Design | Archi-tecture | Press | Adver-tising | Soft-ware/games | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Turnover in 2019 in € billion*** | **9.0** | **14.3** | **2.2** | **1.0** | **10.9** | **5.7** | **20.9** | **12.4** | **30.0** | **29.6** | **50.2** | **1.4** |
| Middle Scenario** | -29 % | -19 % | -31 % | -33 % | -10 % | -36 % | -22 % | -8 % | -9 % | -10 % | -6 % | -22 % |
| Severe Scenario** | -59 % | -34 % | -64 % | -72 % | -17 % | -75 % | -38 % | -14 % | -14 % | -15 % | -10 % | -43 % |

Source: National Accounts, Destatis 2020d, VAT statistics, Destatis 2020a; in-house calculations by Goldmedia.
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries of 21 April 2020;
**A more detailed description of the scenarios can be found in the methodological notes in the Annex, source: VAT statistics, Destatis2020a; in-house calculations by Goldmedia.

# Development of cultural and creative industries, part 1

## Development of cultural and creative industries in Germany 2009 – 2019*

| Key indicators for the cultural and creative industries (CCIs) | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* | Difference 2018/2019 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Number of businesses (in thousands)[1]** | | | | | | | | | | | | |
| Cultural and creative industries | 238.5 | 239.5 | 244.3 | 245.8 | 246.4 | 247.0 | 250.4 | 254.5 | 256.6 | 259.3 | 258.8 | *-0.22 %* |
| Contribution of CCIs to overall economy | 7.61 % | 7.57 % | 7.60 % | 7.56 % | 7.60 % | 7.62 % | 7.69 % | 7.79 % | 7.85 % | 7.91 % | 7.87 % | |
| **Turnover (in € billion)** | | | | | | | | | | | | |
| Cultural and creative industries | 134.3 | 137.3 | 141.0 | 143.3 | 143.2 | 146.9 | 152.1 | 158.8 | 165.2 | 171.1 | 174.1 | *1.77 %* |
| Contribution of CCIs to overall economy | 2.74 % | 2.62 % | 2.48 % | 2.49 % | 2.48 % | 2.50 % | 2.54 % | 2.61 % | 2.60 % | 2.58 % | 2.56 % | |
| **Employment Core workers (in thousands)[2]** | | | | | | | | | | | | |
| Cultural and creative industries | 953.1 | 952.5 | 976.8 | 1.011.7 | 1.037.3 | 1.056.0 | 1.084.9 | 1.120.1 | 1.159.6 | 1.197.8 | 1.235.8 | *3.17 %* |
| Contribution of CCIs to overall economy | 3.10 % | 3.06 % | 3.07 % | 3.11 % | 3.16 % | 3.16 % | 3.19 % | 3.23 % | 3.27 % | 3.31 % | 3.37 % | |
| *Employees subject to social security contributions (in thousands)[3]* | | | | | | | | | | | | |
| Cultural and creative industries | 714.6 | 713.0 | 732.5 | 765.9 | 790.9 | 809.1 | 834.5 | 865.6 | 903.0 | 938.4 | 977.0 | *4.11 %* |
| Contribution of CCIs to overall economy | 2.59 % | 2.55 % | 2.56 % | 2.62 % | 2.67 % | 2.68 % | 2.71 % | 2.75 % | 2.81 % | 2.85 % | 2.92 % | |
| *Self-employed persons (in thousands)[4]* | | | | | | | | | | | | |
| Cultural and creative industries | 238.5 | 239.5 | 244.3 | 245.8 | 246.4 | 247.0 | 250.4 | 254.5 | 256.6 | 259.3 | 258.8 | *-0.22 %* |
| Contribution of CCIs to overall economy | 7.61 % | 7.57 % | 7.60 % | 7.56 % | 7.60 % | 7.62 % | 7.69 % | 7.79 % | 7.85 % | 7.91 % | 7.87 % | |
| **Persons in marginal (self-) employment (in thousands)[5]** | | | | | | | | | | | | |
| Cultural and creative industries | 633.1 | 636.5 | 626.9 | 626.6 | 621.5 | 621.1 | 585.3 | 595.6 | 601.2 | 599.9 | 599.5 | *-0.06 %* |
| Contribution of CCIs to overall economy | 6.51 % | 6.43 % | 6.21 % | 6.12 % | 5.94 % | 5.88 % | 5.58 % | 5.63 % | 5.65 % | 5.59 % | 5.56 % | |
| Self-employed persons with mini-jobs (in thousands)[6] | | | | | | | | | | | | |
| Cultural and creative industries | 256.0 | 257.2 | 258.1 | 261.6 | 268.7 | 270.9 | 277.2 | 285.1 | 291.1 | 298.0 | 300.0 | *0.69 %* |
| Contribution of CCIs to overall economy | 10.84 % | 10.47 % | 10.09 % | 9.88 % | 9.80 % | 9.86 % | 9.93 % | 10.14 % | 10.26 % | 10.41 % | 10.39 % | |
| *Employees in marginal employment (in thousands)[7]* | | | | | | | | | | | | |
| Cultural and creative industries | 377.1 | 379.3 | 368.8 | 365.0 | 352.8 | 350.2 | 308.1 | 310.5 | 310.1 | 301.9 | 299.5 | *-0.80 %* |
| Contribution of CCIs to overall economy | 5.12 % | 5.09 % | 4.89 % | 4.81 % | 4.57 % | 4.48 % | 4.00 % | 4.00 % | 3.97 % | 3.83 % | 3.80 % | |
| **Total workforce (in thousands)[8]** | | | | | | | | | | | | |
| Cultural and creative industries | 1.586.2 | 1.589.0 | 1.603.7 | 1.638.3 | 1.658.8 | 1.677.1 | 1.670.2 | 1.715.7 | 1.760.8 | 1.797.7 | 1.835.3 | *2.09 %* |
| Contribution of CCIs to overall economy | 3.92 % | 3.87 % | 3.82 % | 3.83 % | 3.83 % | 3.81 % | 3.75 % | 3.79 % | 3.82 % | 3.83 % | 3.87 % | |
| **Gross value added (in € billion)[9]** | | | | | | | | | | | | |
| Cultural and creative industries | 71.8 | 75.2 | 79.8 | 83.4 | 88.1 | 89.9 | 92.2 | 97.1 | 97.7 | 102.8 | 106.4 | *3.51 %* |
| Share of CCIs in GDP | 2.94 % | 2.93 % | 2.96 % | 3.04 % | 3.13 % | 3.07 % | 3.04 % | 3.10 % | 3.01 % | 3.07 % | 3.10 % | |
| Gross domestic product (GDP, nominal) | 2,445.7 | 2,564.4 | 2,693.6 | 2,745.3 | 2,811.4 | 2,927.4 | 3,030.1 | 3,134.1 | 3,245.0 | 3,344.4 | 3,435.8 | *2.73 %* |

Cf. footnotes on the following page.
Source: Destatis 2020a,b,c; Federal Employment Agency 2020; in-house calculations by Goldmedia, discrepancies possible due to rounding.

# Development of cultural and creative industries, part 2

## Development of cultural and creative industries in Germany 2009 – 2019*

| Additional key indicators for the cultural and creative industries | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* | Difference 2018/2019 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Average turnover per business (in € thousand) | 563.3 | 573.3 | 577.1 | 583.1 | 581.1 | 594.8 | 607.2 | 624.1 | 643.8 | 659.5 | 672.7 | *1.99%* |
| Turnover per employee subject to social security contributions(in € thousand) | 188.0 | 192.6 | 192.5 | 187.1 | 181.0 | 181.6 | 182.2 | 183.5 | 182.9 | 182.3 | 178.2 | *-2.24%* |
| Turnover per core worker (in € thousand) | 140.9 | 144.2 | 144.3 | 141.7 | 138.0 | 139.1 | 140.2 | 141.8 | 142.4 | 142.8 | 140.9 | *-1.36%* |
| No. of employees subject to social security contributions per business | 3.00 | 2.98 | 3.00 | 3.12 | 3.21 | 3.28 | 3.33 | 3.40 | 3.52 | 3.62 | 3.78 | *4.33%* |
| No. of core workers per business | 4.00 | 3.98 | 4.00 | 4.12 | 4.21 | 4.28 | 4.33 | 4.40 | 4.52 | 4.62 | 4.78 | *3.40%* |
| Gross value added per core worker (in € thousand) | 75.4 | 79.0 | 81.7 | 82.4 | 84.9 | 85.1 | 84.9 | 86.7 | 84.2 | 85.8 | 86.1 | *0.32%* |
| Proportion of core workers who are self-employed | 25.0% | 25.2% | 25.0% | 24.3% | 23.8% | 23.4% | 23.1% | 22.7% | 22.1% | 21.7% | 20.9% | *-3.28%* |

* Data for 2019 based partly on in-house estimates and preliminary official figures. Estimates partly based on development rates of previous years. Discrepancies to figures in previous reports due to revisions of data in the underlying statistics.

1 Taxable entrepreneurs with an annual turnover of more than €17,500.
2 Core workers include taxable entrepreneurs with an annual income of more than €17,500 and employees subject to social security contributions.
3 Employees subject to social security contributions in full and part-time employment but not persons in marginal employment
4 The number of self-employed persons corresponds to the number of taxable entrepreneurs with an annual income of more than €17,500.
5 In deviation from previous studies, persons in marginal (self-)employment include self-employed persons with mini-jobs and persons in marginal employment. The category of 'marginally self-employed persons', which is based on the Federal Statistical Office's microcensus, is no longer used.
6 Self-employed persons with mini-jobs include taxable entrepreneurs with an annual income of €17,500 or less. In deviation from previous studies, the data provided on self-employed persons with mini-jobs is based on a special analysis of the Federal Statistical Office's VAT assessment statistics by turnover bracket. This explains discrepancies between the current figures and those of previous studies.
7 Definition of persons in marginal employment is based on Federal Employment Agency's Employment statistics (annual cut-off date is 30 June).
8 Total workforce includes all self-employed and employed persons including persons in marginal employment and self-employed persons with mini-jobs.
9 Gross value added based on National Accounts figures, calculated on basis of breakdown of revenues in VAT statistics.

Source: Destatis 2020a,b,c; Federal Employment Agency 2020; in-house calculations by Goldmedia..

# Submarket factsheets

*Key data, regional distribution of employees, turnover broken down by economic activity, challenges, trends and forecasts*

# Music industry

Workforce in 2019:

**90,879**

Turnover in 2019:

**€9.0 billion**

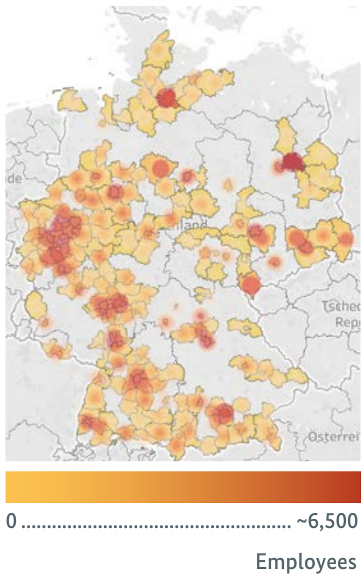
Turnover forecast for 2020:

**Up to -59 %**

# Music industry figures for 2019

The German music industry generated around €9.0 billion in turnover in 2019. That is 4.6% of the cultural and creative industries' total turnover. The largest share of turnover was generated by theatre and concert organisers (at €2.3 billion), followed by music publishers (at €1.8 billion). The music industry accounted for a total of 90,879 workers, with 54,769 core workers and 36,110 persons in marginal employment.

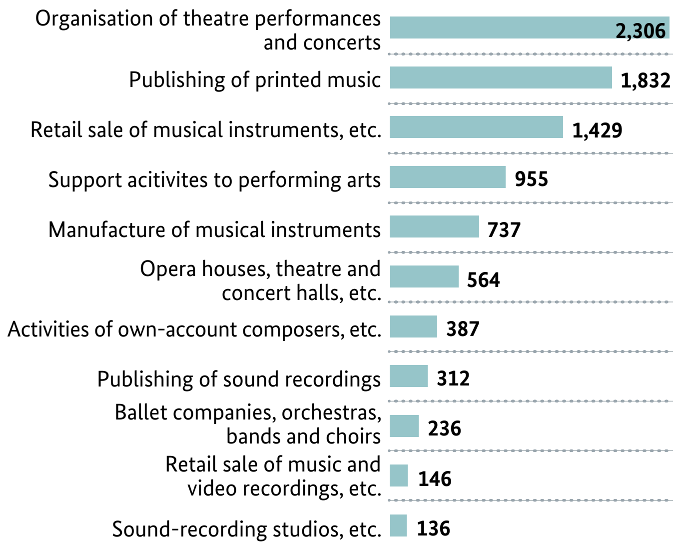
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the music industry in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **14,670** | **4.7 %** |
| **Turnover (in € million)** | **9,039** | **4.6 %** |
| **Total workforce** | **90,879** | **4.3 %** |
| **Core workforce** | **54,769** | **4.0 %** |
| Employees subject to social security contributions | 40,099 | 3.8 % |
| Self-employed persons** | 14,670 | 4.7 % |
| **Persons in marginal (self-) employment** | **36,110** | **5.0 %** |
| Self-employed persons with mini-jobs*** | 20,370 | 5.5 % |
| Persons in marginal employment | 15,741 | 4.4 % |
| **Gross value added (in € million)** | **6,197** | **5.3 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Music industry in 2020: Challenges, trends and forecasts

## Forecast 2020

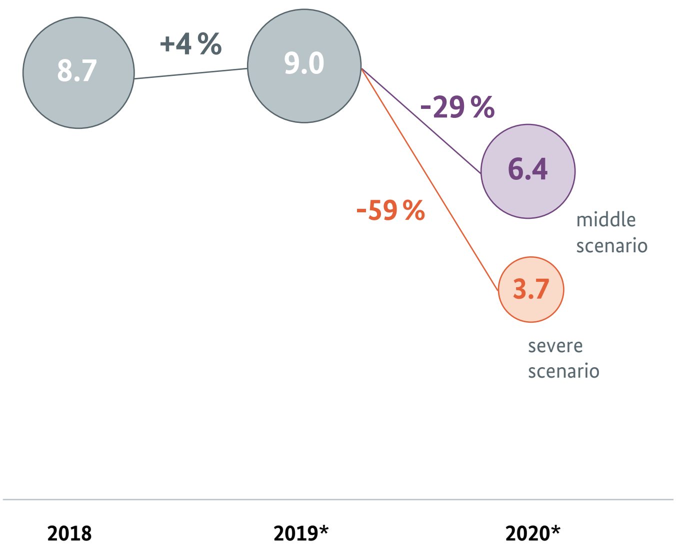
In light of a far-reaching ban on large-scale events until the end of the year, the severe scenario is likely to continue to apply to the music industry, with revenue losses of up to -59% expected.

## Trends and challenges

Audio streaming continues to be one of the main driving forces for growth in the German music industry. It grew by 21% during the Covid-19 pandemic (first half year of 2020). (Source: Bundesverband Musikindustrie (Federal Music Industry Association) 2020)

In contrast to this, the live music sector is facing severe risks. It is currently impossible to predict when and under what conditions live events can once again be held in 2021.

### Turnover forecast for the music industry in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industrie

*"**The entire club and live venue scene is on the verge of insolvency.** (...) In many cases, it will be impossible to revive closed-down music venues in the cities due to high costs, strict requirements for opening and a need for large investments."*

LiveMusikKommission e.V. (LIVEKOMM)
Source: Open letter by LIVEKOMM of 1 June 2020

*"The crisis has not only highlighted **the relevance but also the stability of the music industry's digital segment**.This success is largely owed to the sector's comprehensive diversification and digitalisation strategy, which does not mean that we do not know how far we have come since the early 2000s or how fragile the value creation chain currently is."*

Florian Drücke, Chairman of the Board at Bundesverband Musikindustrie (Federal Music Industry Association).
Source: Goldmedia survey, September 2020

# Book market

Workforce in 2019:

**113,507**

Turnover in 2019:

**€14.3 billion**

Turnover forecast for 2020:

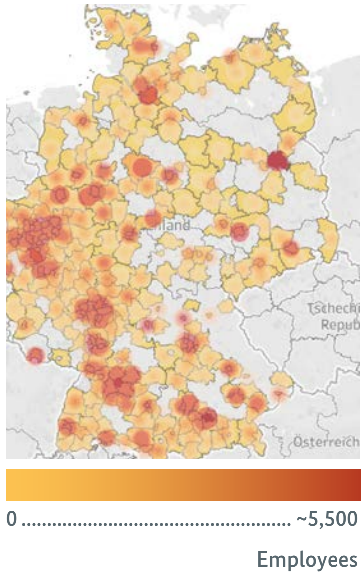
**Up to -34 %**

# Book market figures for 2019

The German book market generated around a€14.3 billion in turnover in 2019. That is around 7.2% of the cultural and creative industries' total turnover. Book publishing accounted for the largest share of book market turnover, generating €8.6 billion (60%), followed by retail sale of books (€3.8 billion), which contributed around a quarter (27%) to total turnover. 113,507 people worked in the book market in 2019.

These included 68,824 core workers and 44,683 persons in marginal (self-)employment.

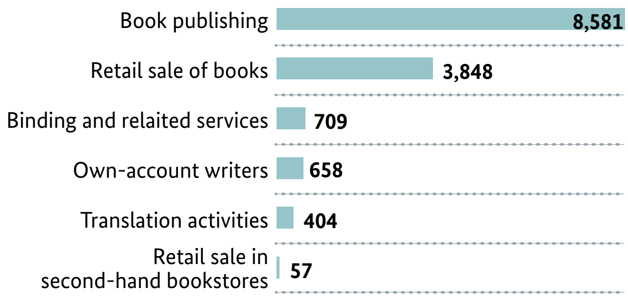
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the book market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **17,450** | **5.6 %** |
| **Turnover (in € million)** | **14,257** | **7.2 %** |
| **Total workforce** | **113,507** | **5.4 %** |
| **Core workforce** | **68,824** | **5.0 %** |
| Employees subject to social security contributions | 51,374 | 4.8 % |
| Self-employed persons** | 17,450 | 5.6 % |
| **Persons in marginal (self-) employment** | **44,683** | **6.1 %** |
| Self-employed persons with mini-jobs*** | 29,291 | 7.9 % |
| Persons in marginal employment | 15,392 | 4.3 % |
| **Gross value added (in € million)** | **5,549** | **4.7 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Book market in 2020: Challenges, trends and forecasts

## Forecast 2020

Bookshops were able to offset part of the turnover lost during closure by selling books via online shops or setting up delivery services. For this industry, the middle scenario (-19%) is likely to apply.

## Trends and challenges

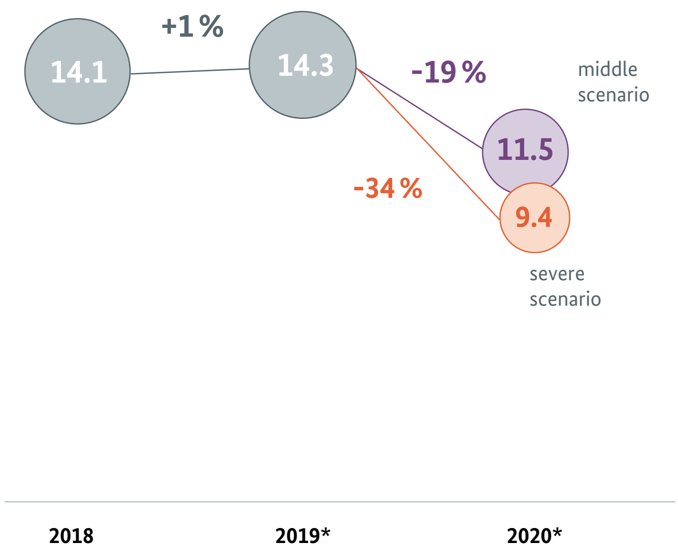
Digitalisation and the resulting structural change mean that the number of pedestrians and customers in city centres is declining. This development continues to put pressure on bricks-and-mortar bookstores. Another important aspect is ensuring and promoting reading comprehension among the population, particularly among children and young people.

*"Physical bookshops have quickly set up and expanded delivery services, showing that they are **highly flexible, creative and customer-oriented**. This often helped retain customers and to some extent at least mitigate revenue losses."*

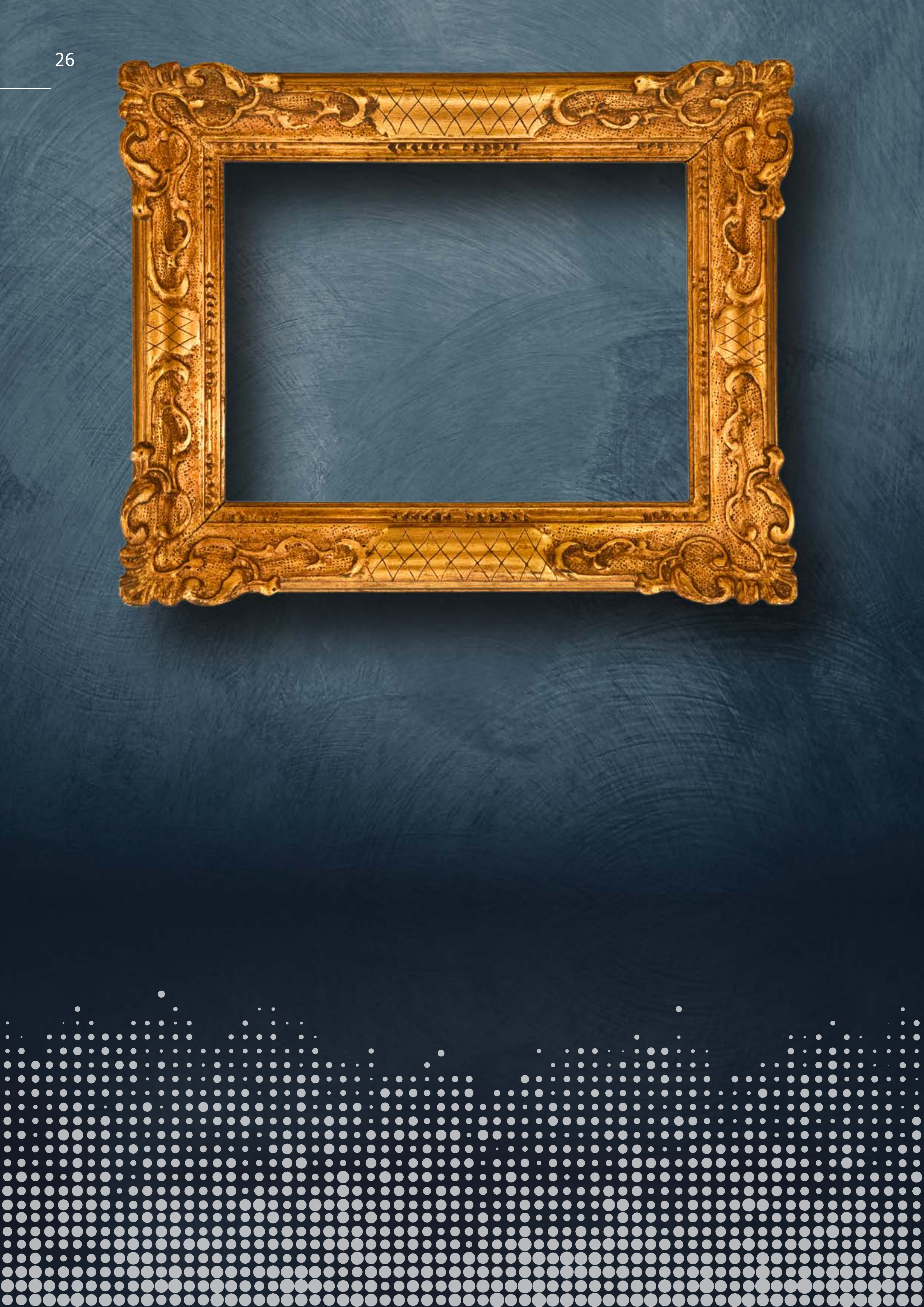
*"In a situation where publishers could no longer present new books to the public **they reacted by making changes to their programme planning**. New releases were pushed back. Some books, most of them niche products or books of as yet unknown authors were eliminated from the programme altogether."*

Alexander Skipis, Managing Director of the German Publishers and Booksellers Association
Source: Goldmedia survey, September 2020

### Turnover forecast for the book market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries



# Art market

Workforce in 2019:

**49,224**

Turnover in 2019:

**€2.2 billion**

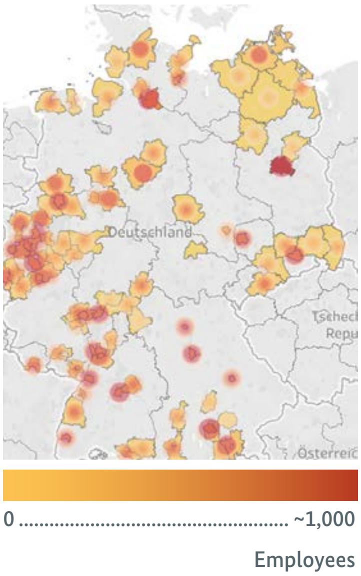
Turnover forecast for 2020:

**Up to -64 %**

# Art market figures for 2019

The German art market generated around €2.2 billion in total in 2019. Own-account visual artists account for the largest share of art market turnover, generating €860 million (around 39%), followed by retail sale of art (€643 million, around 29%) and museums activities (€419 million, around 19%). 49,224 people worked in the art market in 2019. These included 17,679 core workers and 31,545 persons in marginal (self-)employment, most of them persons with mini-jobs.

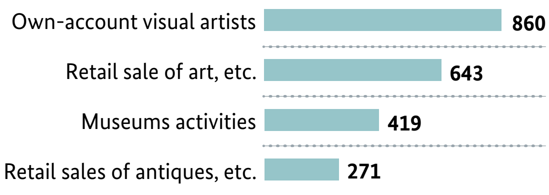
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the art market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **12,390** | **4.0 %** |
| **Turnover (in € million)** | **2,192** | **1.1 %** |
| **Total workforce** | **49,224** | **2.3 %** |
| **Core workforce** | **17,679** | **1.3 %** |
| Employees subject to social security contributions | 5,289 | 0.5 % |
| Self-employed persons** | 12,390 | 4.0 % |
| **Persons in marginal (self-) employment** | **31,545** | **4.3 %** |
| Self-employed persons with mini-jobs*** | 27,921 | 7.5 % |
| Persons in marginal employment | 3,624 | 1.0 % |
| **Gross value added (in € million)** | **1,292** | **1.1 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Art market in 2020:
# Challenges, trends and forecasts

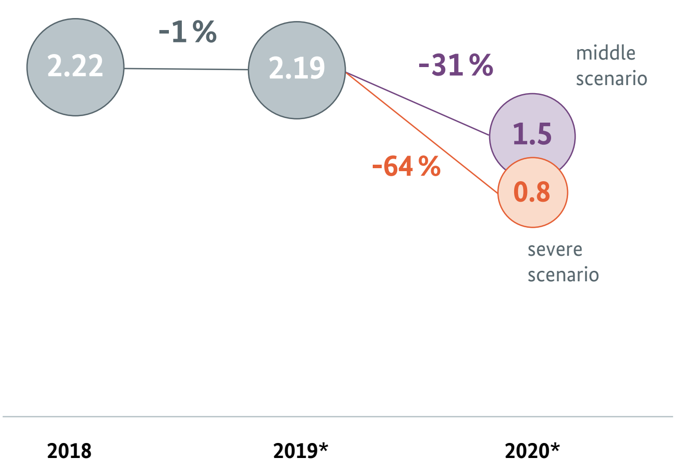
## Forecast 2020

Gallery closures, reduced opening hours, cancellations of art fairs and international visitors and buyers staying away will lead to revenue losses of up to 31% in the art market under the middle scenario. In case of another lockdown being imposed, the severe scenario (-64%) is expected to apply.

## Trends and challenges

Pandemic-related closures and reduced opening hours have led galleries to embrace digitalisation, with art increasingly being shown and marketed online. Auction houses had a rather strong online and social media presence already before the crisis.

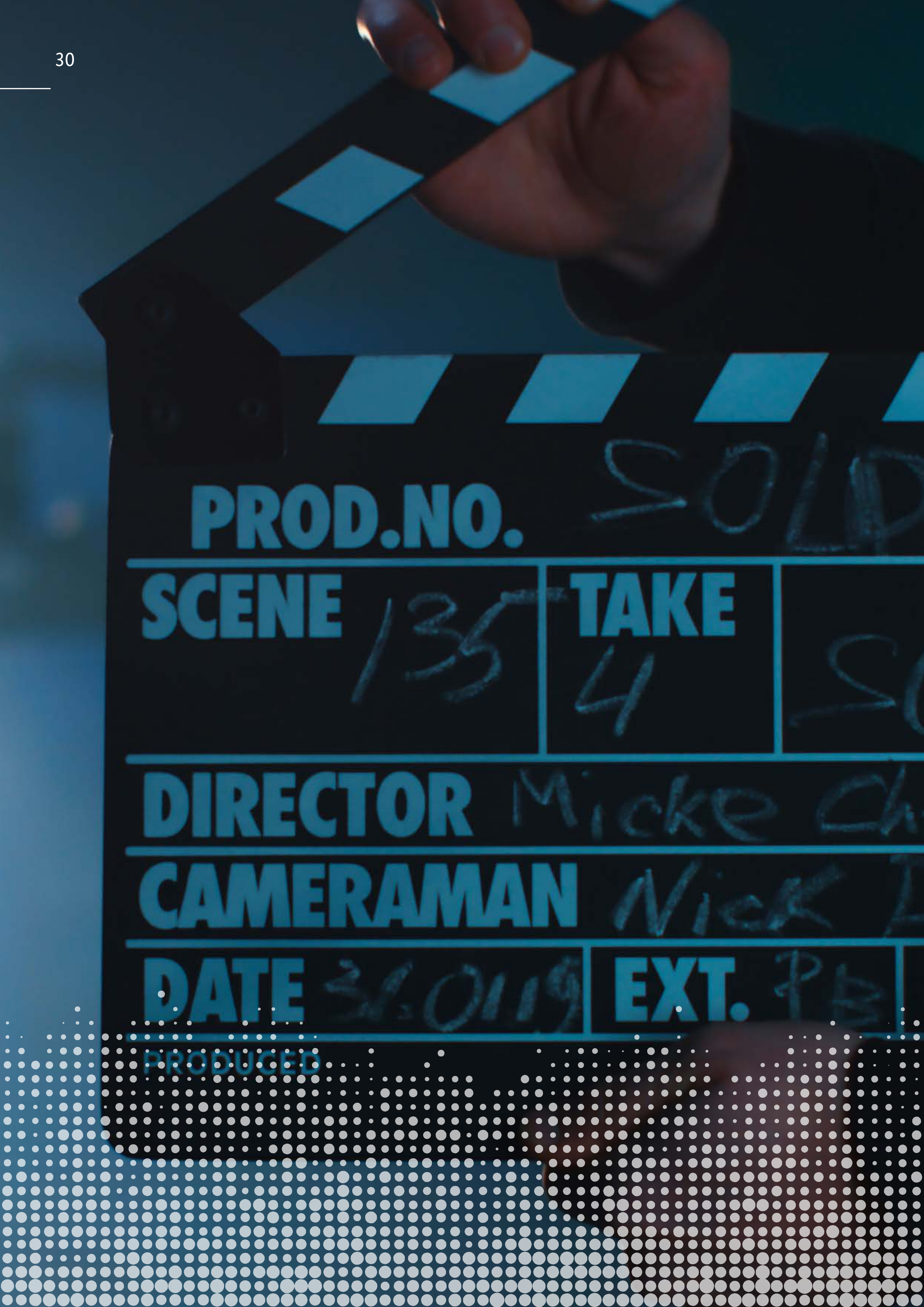
## Turnover forecast for the art market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"As long as almost all large international art fairs are suspended, we are missing an important place* ***for communication, networking, presenting our offers and attracting buyers."***

Birgit Maria Sturm,
Managing Director of the Association of German galleries and art dealers
Source: Goldmedia survey, September 2020




PRODUCED

# Film industry

Workforce in 2019:

**122,458**

Turnover in 2019:

**€10.0 billion**

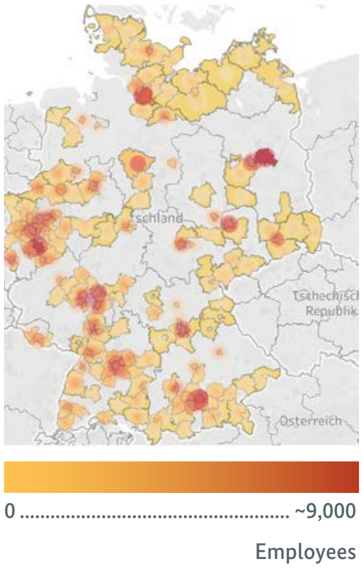
Turnover forecast for 2020:

**Up to -72 %**

# Film industry figures for 2019

The German film industry generated around €10 billion in 2019, contributing around 5% to total CCI turnover. Film and TV production companies account for more than half (52%) of total film industry turnover. A total of 122,458 people worked in the film industry in 2019 (that is 5.8% of the total CCI workforce).These include 63,264 core workers and 59,194 persons in marginal (self-) employment.

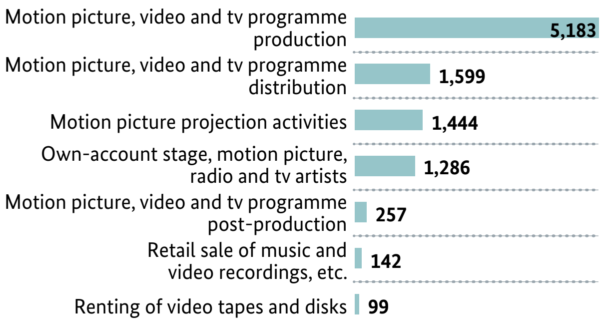
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the film industry in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **19,975** | **6.4 %** |
| **Turnover (in € million)** | **10,011** | **5.1 %** |
| **Total workforce** | **122,458** | **5.8 %** |
| **Core workforce** | **63,264** | **4.6 %** |
| Employees subject to social security contributions | 43,289 | 4.1 % |
| Self-employed persons** | 19,975 | 6.4 % |
| **Persons in marginal (self-) employment** | **59,194** | **8.1 %** |
| Self-employed persons with mini-jobs*** | 37,860 | 10.2 % |
| Persons in marginal employment | 21,334 | 6.0 % |
| **Gross value added (in € million)** | **7,473** | **6.3 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Film industry in 2020: Challenges, trends and forecasts

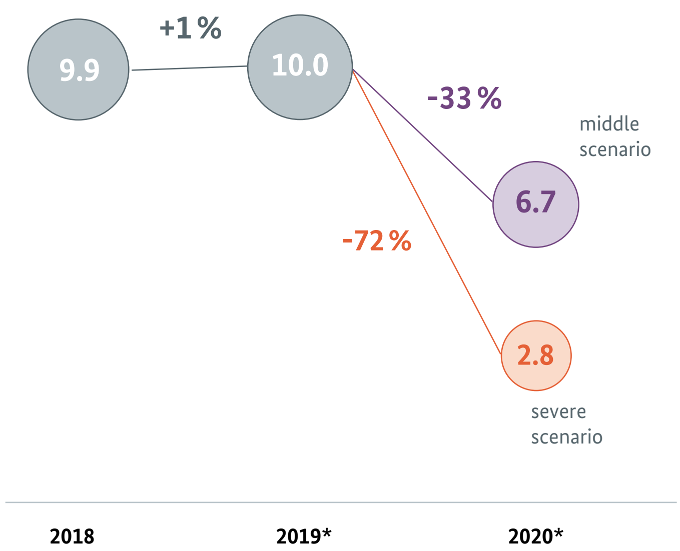
## Forecast 2020

The middle scenario assumes that due to the Covid-19 pandemic, film industry turnover will be one third less than in the previous year. The severe scenario even expects turnover losses of more than 70%.

## Trends and challenges

Whilst cinema operators are battling to simply survive, many other segments have been less hard hit by the crisis. Many production companies were able to relaunch operations this summer, with film and TV productions back in full swing. A new lockdown in autumn, however, could deliver another blow to the industry.

### Turnover forecast for the film industry in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"The Covid-19 crisis is a double blow to the film industry. With cinemas having had to close their doors, the industry lost its most important source of income. And with all the shops closed down, Germany's important home entertainment market of blue-ray and DVDs also collapsed. On the production site, filmmaking has come to a halt due to legal uncertainty and rules banning film shootings. Despite all this, cinemas and studies continue to pay fixed costs."*

Thomas Negele, President of SPIO e.V
Source: Blickpunkt:Film, April 2020

*"The coronavirus pandemic threatens the survival of the production sector. Many shoots had to be cancelled at high costs and many productions halted. This has made very clear the size of the impact the pandemic is having on the industry. Insurance companies do not cover the risk of having to suspend a shoot due to Covid-19. The introduction of protective shields and default funds therefore was very important. Without such measures, the viability of the German production industry will be put at risk and thus also the provision of programmes to customers."*

Alexander Thies, Chairman of the Executive Board at Produzentenallianz (German Producers Alliance)
Source: Produzentenallianz, October 2020


ON AIR
ON AIR

# Broadcasting industry

Workforce in 2019:

**65,983**

Turnover in 2019:

**€10.9 billion**

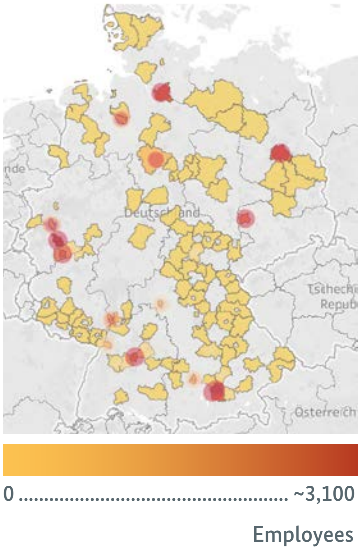
Turnover forecast for 2020:

**Up to -17 %**

# Broadcasting industry figures for 2019

The broadcasting industry (public broadcasters not included) generated around €10.9 billion in total in 2019. Private-sector television broadcasters contributed by far the largest share of the industry's turnover (79%). Private-sector radio broadcasters and own-account journalists and press photographers form also part of this submarket. A total of 65,983 people work in broadcasting, 42,053 of whom are core workers and 23,930 persons in marginal (self-)employment.

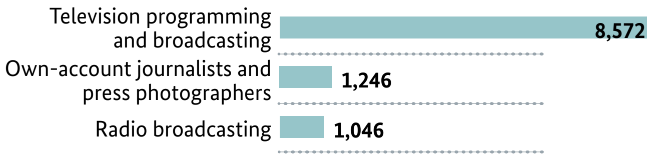
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the broadcasting industry in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **17,091** | **5.5 %** |
| **Turnover (in € million)** | **10,864** | **5.5 %** |
| **Total workforce** | **65,983** | **3.1 %** |
| **Core workforce** | **42,053** | **3.1 %** |
| Employees subject to social security contributions | 24,962 | 2.4 % |
| Self-employed persons** | 17,091 | 5.5 % |
| **Persons in marginal (self-) employment** | **23,930** | **3.3 %** |
| Self-employed persons with mini-jobs*** | 22,349 | 6.0 % |
| Persons in marginal employment | 1,581 | 0.4 % |
| **Gross value added (in € million)** | **8,135** | **6.9 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Broadcasting industry in 2020: Challenges, trends and forecasts

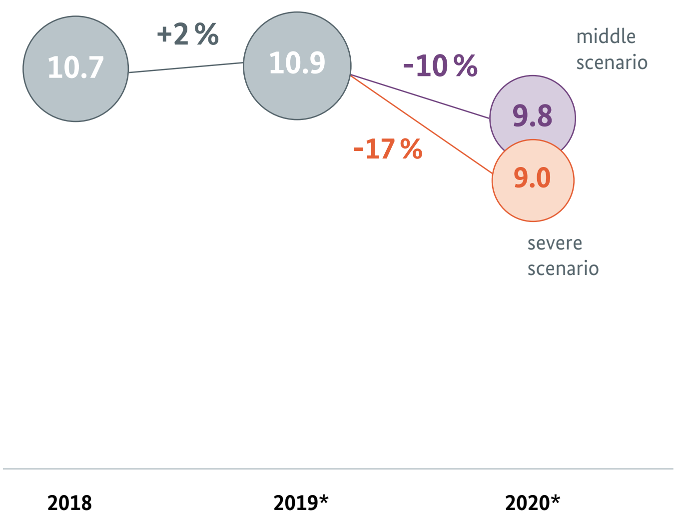
## Forecast 2020

ProSiebenSat.1 Media SE and Mediengruppe RTL Deutschland – the two largest private networks – reported turnover losses of between 12% and 17% for the first half year of 2020. (Source: ProSieben-Sat.1 Media SE 2020; RTL Group 2020). For the broadcasting industry as a whole, turnover losses of between 10% and 17% are expected for 2020.

## Trends and challenges

Even before the pandemic, there was considerable pressure on advertising-sponsored broadcasters, with advertising expenditure increasingly shifting towards online ads. This long-term trend has accelerated during the crisis. Whilst advertising expenditure for TV and radio saw a considerable decline, digital advertising increased by 3% (Source: Nielsen 2020).

### Turnover forecast for the broadcasting industry in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

> *"Even though we are proud of our editing teams, programme planners and technical staff who throughout this crisis have provided millions of people in Germany with up-to-date and reliable information, entertainment and orientation around the clock, the* ***Covid-19 pandemic marks a turning point for our industry.****"*
>
> Hans Demmel, Chairman of the Board at VAUNET (up until September 2020
>
> Source: VAUNET, press release of 16 September 2020

> *"Given our experience from previous crises, we fear that the advertising market will not bounce back immediately after the coronavirus crisis is over* ***but will take several years to attain pre-crisis levels****. This is particularly unfortunate as the advertising and communication markets can and should make an important contribution to relaunching the economy after the crisis."*
>
> Frank Giersberg, Managing Director at VAUNET
>
> Source: Goldmedia survey, September 2020

# Performing arts market

Workforce in 2019:

**111,300**

Turnover in 2019:

**€5.7 billion**

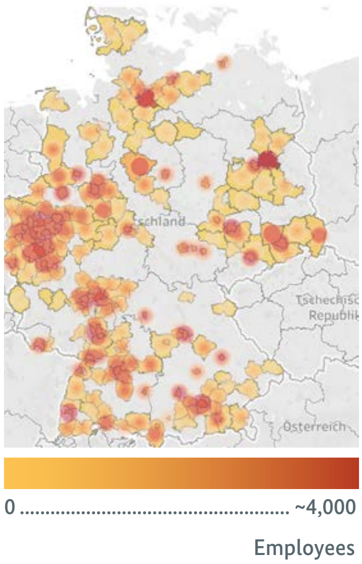
Turnover forecast for 2020:

**Up to -75 %**

# Performing arts market figures for 2019

The performing arts market generated around €5.7bn in 2019. It has considerable overlaps with the music and film industry. Organisers of theatre performances and concerts accounted for the largest share of the market's turnover, generating €2.2 billion (40%), followed by own-account stage, motion picture and TV artists (€1.3 billion, 23%). A total of 111,300 people work in the performing arts sector, 48,578 of whom are core workers and 62,722 persons in marginal (self-)employment.

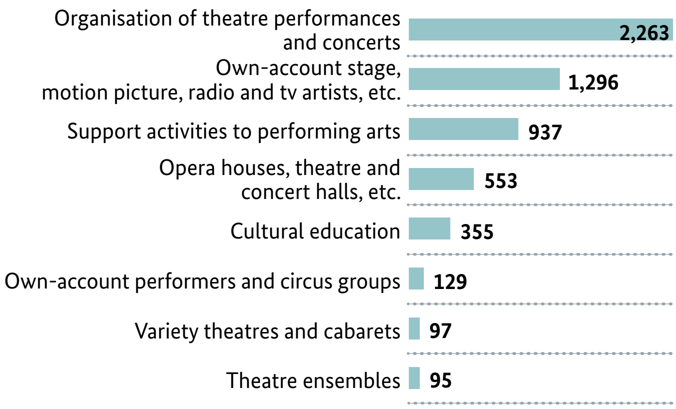
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the performing arts market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **21,212** | **6.8 %** |
| **Turnover (in € million)** | **5,724** | **2.9 %** |
| **Total workforce** | **111,300** | **5.3 %** |
| **Core workforce** | **48,578** | **3.5 %** |
| Employees subject to social security contributions | 27,366 | 2.6 % |
| Self-employed persons** | 21,212 | 6.8 % |
| **Persons in marginal (self-) employment** | **62,722** | **8.6 %** |
| Self-employed persons with mini-jobs*** | 40,835 | 11.0 % |
| Persons in marginal employment | 21,887 | 6.1 % |
| **Gross value added (in € million)** | **8,247** | **7.0 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

## Performing arts market in 2020: Challenges, trends and forecasts

### Forecast 2020

Both own-account artists and businesses have been hit hard by the cancellation of events. Some have lost all of their revenue. The introduction of social distancing rules, also on stages, and reduced capacities for audiences could lead to turnover losses of up to 75% under the severe scenario.

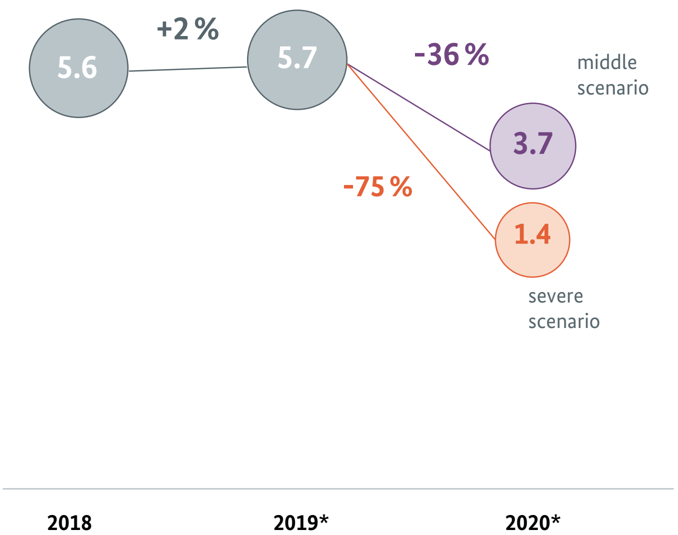
### Trends and challenges

The pandemic will remain the main issue in the months to come. The restrictions on audiences in theatre and concert venues currently vary across the Länder, and opportunities to recover financially are thus not evenly distributed. Dependence on public funding is increasing across the industry.

*"We expect dramatic revenue losses, the impact of which will be felt not only by privately-run theatres, but also many publicly-funded venues.* ***Own-account performing artists and groups are currently particularly at risk."***

Marc Grandmontagne,
Managing Director at Deutscher Bühnenverein
(German stage association)
Source: Deutsche Bühnenverein, press release of 12 March 2020

### Turnover forecast for the performing arts market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries


PAWTERGEIST
TODAY RUNNING COMPANY
REPRESENT MY HOOD
你媽資
BACK TO THE UNDERGROUND
OFFICINE JIU JITSU
HAKUNA MATATA
NATURAL X RELAX
NEKROPUNTA
Italian Hardcore Punk
MENIS STAR!
AFAR
Stay Winnin
I TAIWAN
MX KNOWS
NEW SCHOOLERS
CLOAK+ DAGGER
NON OF THIS IS REAL
SCHON SCHMECKT WIEDER!
Conversando
El Nido
線路越界
MENIS STAR!
TAKE CAFFEINE AND SEE REALITY
CANTONTEE
CREW

# Design industry

Workforce in 2019:

**275,395**

Turnover in 2019:

**€20.9 billion**

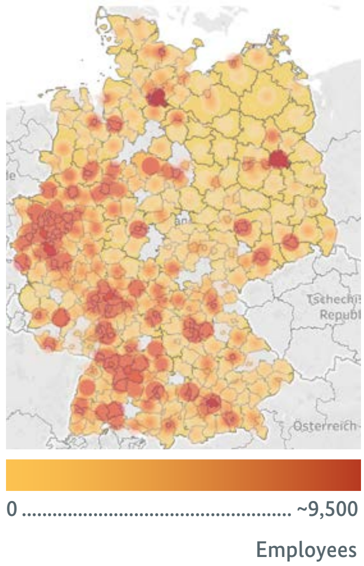
Turnover forecast for 2020:

**Up to -38 %**

# Design industry figures for 2019

The German design industry generated a total of around €21 billion in 2019. In keeping with the Monitoring Report's definition, half the revenues of advertising agencies are counted towards the design industry. Advertising agencies generated the largest share by far of the design industry's turnover (62%). A total of 275,395 people worked in the design industry in 2019, 153,570 of whom were core workers and 121,826 persons in marginal (self-)employment.

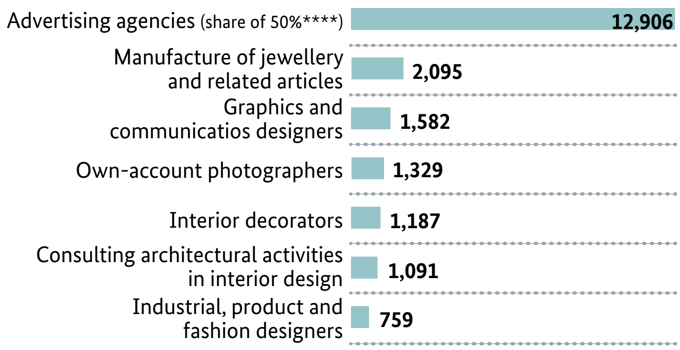
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the design industry in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **60,481** | **19.4 %** |
| **Turnover (in € million)** | **20,949** | **10.7 %** |
| **Total workforce** | **275,395** | **13.1 %** |
| **Core workforce** | **153,570** | **11.2 %** |
| Employees subject to social security contributions | 93,089 | 8.8 % |
| Self-employed persons** | 60,481 | 19.4 % |
| **Persons in marginal (self-) employment** | **121,826** | **16.7 %** |
| Self-employed persons with mini-jobs*** | 65,138 | 17.5 % |
| Persons in marginal employment | 56,688 | 15.9 % |
| **Gross value added (in € million)** | **10,745** | **9.1 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less; ****According to the definition of the design industry used in this report, 50% of the turnover generated by advertising agencies (WZ 70.40.1) is counted towards the design industry. Map: www.standortmonitor.net

# Design industry in 2020: Challenges, trends and forecasts

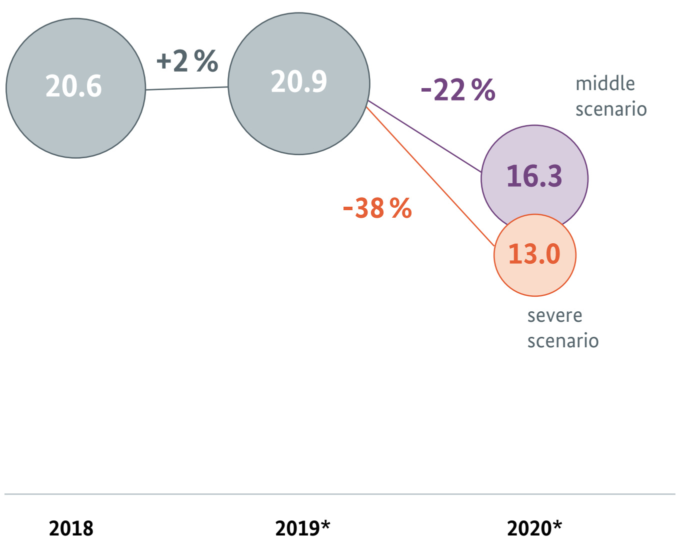
## Forecast 2020

Own-account designers have been particularly hard hit by the pandemic as many public relations projects were reduced in size or cancelled altogether. Marketing budgets take long to recover, therefore the severe scenario, resulting in revenue losses of up to -38% is expected to apply.

## Trends and challenges

The crisis has shown that the design industry is a key driving force for digitalisation. A number of regulatory issues remain, for example how intermediate inputs are to be taken into account in tendering procedures, how false self-employment can be prevented and how own-account workers can be helped to support themselves in old age.

### Turnover forecast for the design industry in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"**The consequences of the pandemic will be felt throughout the next year**. Experience has shown that the benefits of an economic recovery take three to six months to reach the design industry once companies start stepping up investment in marketing once again."*

Claudia Siebenweiber,
President at BDG – Berufsverband der Deutschen Kommunikationsdesigner e.V. (Association of German communication designers)
Source: Goldmedia survey, September 2020

*"In the design industry in particular, it will take time before the entire force of the impact is felt – the crisis threatens the existence of an industry which in the last few years had become a key stakeholder in shaping innovation, regional economic policy and the future."*

Boris Kochan,
President at Deutscher Designtag e.V.
(German Design Association).
Source: Goldmedia survey, September 2020

# Architecture market

Workforce in 2019:

**176,382**

Turnover in 2019:

**€12.4 billion**

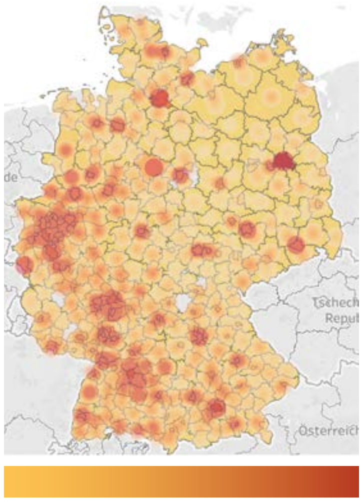
Turnover forecast for 2020:

**Up to -14 %**

# Architecture market figures for 2019

The German architecture market generated a total of around €12.4 bn in 2019, contributing 6.3% to the CCIs as a whole. Consulting architectural activities in building construction accounted for two thirds of architecture market turnover (67%). A total of 176,382 people worked in architecture in 2019, 136,910 of whom were core workers and 39,472 persons in marginal employment or self-employment.

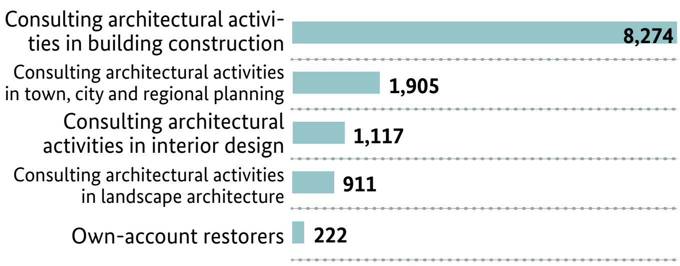
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the architecture market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **38,395** | **12.3 %** |
| **Turnover (in € million)** | **12,427** | **6.3 %** |
| **Total workforce** | **176,382** | **8.4 %** |
| **Core workforce** | **136,910** | **10.0 %** |
| Employees subject to social security contributions | 98,515 | 9.3 % |
| Self-employed persons** | 38,395 | 12.3 % |
| **Persons in marginal (self-) employment** | **39,472** | **5.4 %** |
| Self-employed persons with mini-jobs*** | 19,902 | 5.4 % |
| Persons in marginal employment | 19,570 | 5.5 % |
| **Gross value added (in € million)** | **7,882** | **6.7 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Architecture market in 2020: Challenges, trends and forecasts

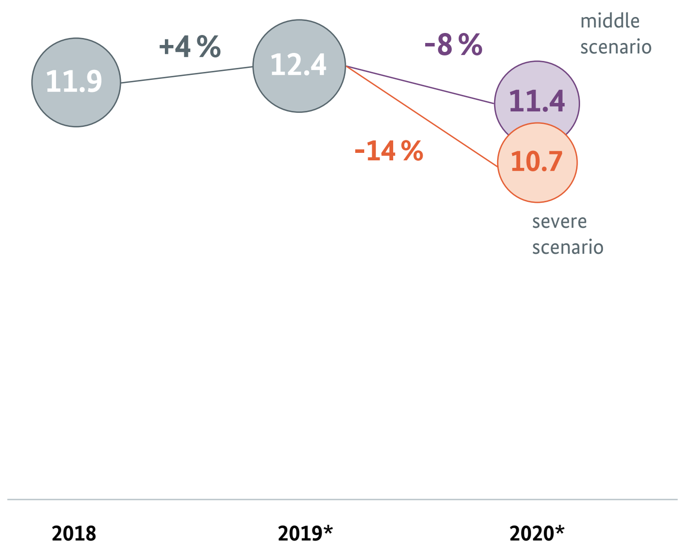
## Forecast 2020

Several years of well-filled order books meant that the architecture market was less affected by the crisis and continued to work to capacity even after the pandemic hit. The middle scenario expects turnover losses of 8%.

## Trends and challenges

In the medium and long term, the pandemic will increase the demand for new set-ups for offices and public spaces. In addition to this, the climate crisis presents architecture with new challenges such as planning and constructing urban spaces in a climate-friendly way.

### Turnover forecast for the architecture market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"Many architects will not be affected by the pandemic before 2021 when the impact from the smaller number of orders placed in 2020 will be felt."*

Gerhard Zach,
President at the Verband Deutscher Architekten VDA e.V.
(Association of German Architects)
Source: Goldmedia survey, September 2020

*"Many years of inadequate staffing and a lack of technical equipment in planning and building construction departments combined with the impact of the Covid-19 pandemic has had an extremely negative impact on the industry and is weakening the signs of recovery."*

Dr Thomas Welter,
Managing Director at the Bund Deutscher Architekten BDA
(Federation of German Architects)
Source: Goldmedia survey, September 2020

# Press market

Workforce in 2019:

**245,168**

Turnover in 2019:

**€30.0 billion**

Turnover forecast for 2020:

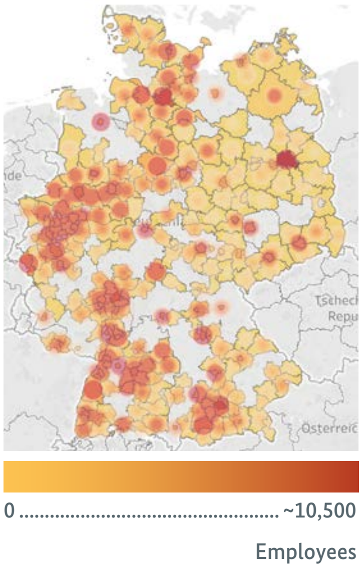
**Up to -14 %**

# Press market figures for 2019

The German press market generated a total of around €30 bn in 2019. This corresponds to around 15.3% of total CCI turnover. Newspaper publishers accounted for around 35% of press market turnover (€10.5 bn), whilst publishers of journals and periodicals contributed 29% (€8.6 bn).

A total of 245,168 people worked in the press market, 141,568 of whom were core workers and 103,600 persons in marginal (self-)employment.

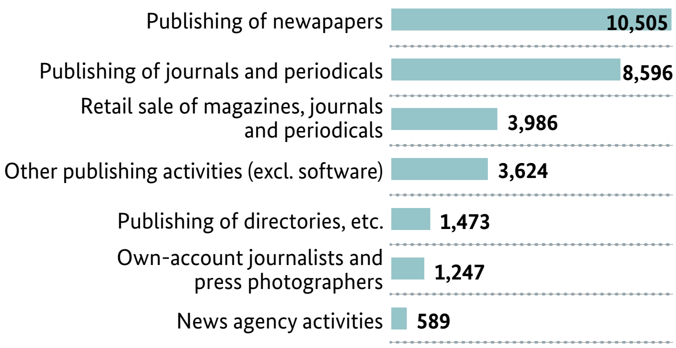
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the press market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **31,082** | **10.0%** |
| **Turnover (in € million)** | **30,019** | **15.3%** |
| **Total workforce** | **245,168** | **11.7%** |
| **Core workforce** | **141,568** | **10.3%** |
| Employees subject to social security contributions | 110,486 | 10.4% |
| Self-employed persons** | 31,082 | 10.0% |
| **Persons in marginal (self-) employment** | **103,600** | **14.2%** |
| Self-employed persons with mini-jobs*** | 28,098 | 7.6% |
| Persons in marginal employment | 75,502 | 21.2% |
| **Gross value added (in € million)** | **12,774** | **10.8%** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Press market in 2020: Challenges, trends and forecasts

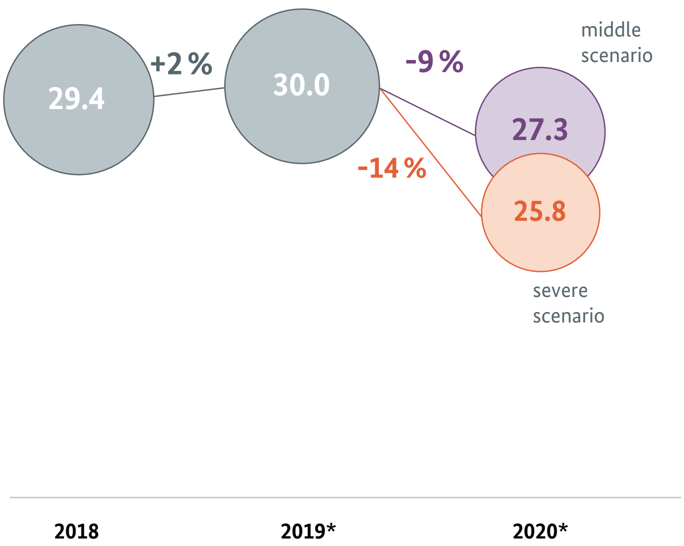
## Forecast 2020

Whilst daily and weekly newspapers have benefitted from a strong demand for news, general interest magazines saw a considerable decline in sales due to lockdown. Turnover losses of between 9% and 14% are expected for the press market as a whole.

## Trends and challenges

The press market had been under pressure already before the crisis due to a drop in circulation and the impact of the digital transformation. The impact on distribution could become more severe once short-term work benefits are withdrawn, leaving private households with less money to spend. The increase in minimum wages is driving up the cost of newspaper deliveries.

### Turnover forecast for the press market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"Ad revenue across the industry **dropped by up to 60%** year-on-year, particularly in April 2020. In summer, some newspaper publishers once again generated almost as much ad revenue as in the previous year." **Sales turnover** in 2020 should be almost the same as last year, **as newspapers were able to attract new customers**, both for print and digital newspaper subscriptions."*

Christian Eggert,
head of publishing at BDZV – Bundesverband Digitalpublisher und Zeitungsverleger e.V. (Federation of German Newspaper Publishers)
Source: Goldmedia survey, September 2020

*"**Depending on the sector, ad revenue fell by between 20% and more than 80% in April and May;** ad-financed specialist publications in certain areas of the industry are particularly affected by this. Some of the points of sale located at airports and railway stations have lost more than 50% of their sales. These points of sale often offer a large selection of newspapers and magazines, which is why special-interest publications have been particularly hart hit."*

Stefan Scherzer,
Managing Director at VDZ – Verband Deutscher Zeitschriftenverleger (Association of German Magazine Publishers)
Source: medienpolitik.net, July 2020

# Advertising market

Workforce in 2019:

**277,249**

Turnover in 2019:

**€29.6 billion**

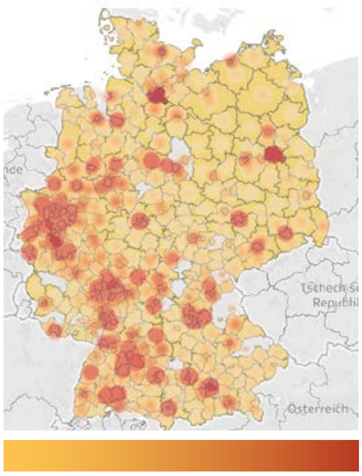
Turnover forecast for 2020:

**Up to -15 %**

# Advertising market figures for 2019

The German advertising market generated a total of around €29.6 bn in 2019, contributing 15.1% to total CCI turnover. The market consists of only two sectors, with advertising agencies contributing around 85% (€25.1 bn). Another €4.5 bn is generated by media representation. A total of 277,249 people work in the press market, 157,869 of whom are core workers and 119,380 persons in marginal (self-)employment.

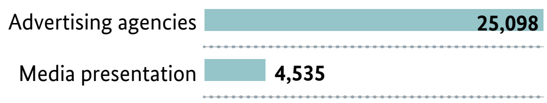
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the advertising market in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **29,142** | **9.3 %** |
| **Turnover (in € million)** | **29,633** | **15.1 %** |
| **Total workforce** | **277,249** | **13.2 %** |
| **Core workforce** | **157,869** | **11.5 %** |
| Employees subject to social security contributions | 128,727 | 12.1 % |
| Self-employed persons** | 29,142 | 9.3 % |
| **Persons in marginal (self-) employment** | **119,380** | **16.4 %** |
| Self-employed persons with mini-jobs*** | 24,704 | 6.6 % |
| Persons in marginal employment | 94,676 | 26.6 % |
| **Gross value added (in € million)** | **11,866** | **10.1 %** |

## Turnover broken down by economic activity (WZ groups) in 2019* (in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

# Advertising market in 2020: Challenges, trends and forecasts

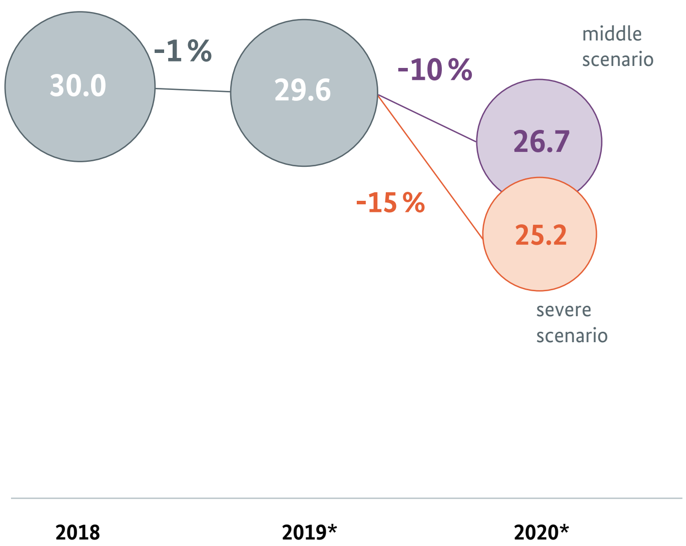
## Forecast 2020

Advertising vehicles such as cinemas, sponsors, and the trade fair, conference and event industry at times came to a complete halt during the pandemic. The advertising market as a whole is highly dependent on the macro-economic situation. As a result, the market is expected to lose 10% to 15% of its turnvoer this year.

## Trends and challenges

In 2019, online ads replaced print ads as Germany's most important advertising vehicle (Source: ZAW 2020). This trend will pick up speed during the crisis and puts increasing pressure on traditional advertising vehicles such as radio and TV. The high level of concentration in the digital advertising market is creating ever more challenges for the industry.

### Turnover forecast for the advertising market in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"Digital advertising has fared relatively well during the crisis. However, the pandemic is accelerating the shift towards online mega platforms which are already dominating the market."*

Andreas F. Schubert,
President at ZAW e.V. Zentralverband der deutschen Werbewirtschaft
(German Advertising Federation)
Source: Goldmedia survey, September 2020

*"Some advertising agencies have already been severely affected by the Covid-19 pandemic. The situation of individual agencies varies considerably and depends on the business model used and the services offered."*

Thomas Eickhoff,
Vice President at GWA e.V. Gesamtverband Kommunikationsagenturen
(Association of Communications Agencies)
Source: GWA, press release of 13 March 2020

# Software/games industry

Workforce in 2019:

**545,714**

Turnover in 2019:

**€50.2 billion**

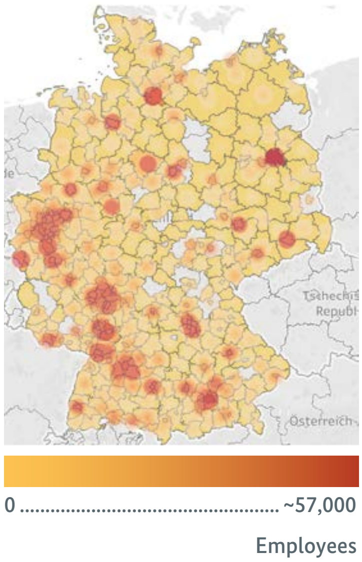
Turnover forecast for 2020:

**Up to -10 %**

# Software/games industry figures for 2019

According to the CCI Monitoring Report's present definition (cf. explanations in outlook section), the software/games industry is the largest submarket of the German cultural and creative industries. It generated €50.2 bn in 2019 – that is around one quarter (25.5%) of total CCI turnover. 'Other software development' accounts for the largest share of software/games industry turnover (79%, around €39.5 bn). 545,714 people worked in the software/games industry in 2019, 471,983 of whom were core workers and 73,731persons in marginal (self-) employment.

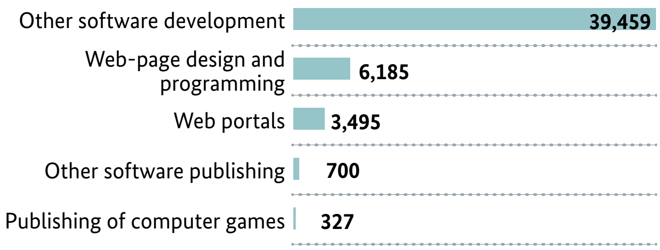
## Regional distribution of employees (subject to social security contributions and in marginal employment), June 2019




## Key data on the software/games industry in Germany in 2019*

| Category | 2019* | Contribution to CCIs |
|---|---|---|
| **Number of businesses** | **41,963** | **13.4 %** |
| **Turnover (in € million)** | **50,166** | **25.5 %** |
| **Total workforce** | **545,714** | **26.0 %** |
| **Core workforce** | **471,983** | **34.4 %** |
| Employees subject to social security contributions | 430,020 | 40.6 % |
| Self-employed persons** | 41,963 | 13.4 % |
| **Persons in marginal (self-) employment** | **73,731** | **10.1 %** |
| Self-employed persons with mini-jobs*** | 44,774 | 12.0 % |
| Persons in marginal employment | 28,957 | 8.1 % |
| **Gross value added (in € million)** | **36,712** | **31.1 %** |

## Turnover broken down by economic activity (WZ groups) in 2019*(in € million)




Source: Goldmedia, HMS, Prof. Wink; *In-house calculations by Goldmedia, based on: Destatis 2020a,b,c; discrepancies possible due to rounding; percentage figures calculated based on cultural and creative industries as a whole, including double counts; **self-employed persons = taxable entrepreneurs with an annual turnover of more than €17,500; ***self-employed persons with mini-jobs = taxable entrepreneurs with an annual turnover of €17,500 or less. Map: www.standortmonitor.net

## Software/games industry in 2020: Challenges, trends and forecasts

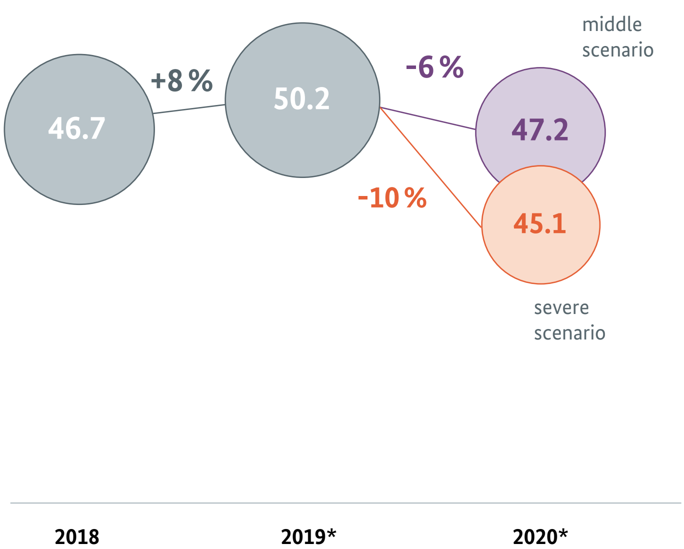
### Forecast 2020

The software/games industry has been hit less hard by the crisis than other sectors. Some businesses even saw demand for their services increase as part of a pandemic-driven move towards digitalisation. This said, the software/games submarket as a whole is expected to lose 6% to 10% of its turnover.

### Trends and challenges

The German games market is becoming ever more important. The Federal Government is planning to provide €250 million in funding for games development between 2020 and 2023 (Source: Federal Ministry of Transport and Digital Infrastructure 2020). Investment in grid infrastructure, access to capital and the availability of skilled workers are key for the market to continue to grow.

### Turnover forecast for the software/games industry in 2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink;
*2019 figures are estimates. Forecast for 2020 based on scenario analysis for 2020 by the Federal Government's Centre of Excellence for the Cultural and Creative Industries

*"The Covid-19 crisis has driven forward **digitalisation across the economy, government and society as a whole.**"*

Bastian Pauly,
spokesperson for Bitkom e.V.
Source: Goldmedia survey, September 2020

*"The Covid-19 pandemic has both upsides and downsides for the games industry. In the months of lockdown, the number of people playing games reached a new record. However, the situation for service providers, event organisers and e-sports companies continues to be challenging. Games developers have also been affected by the pandemic. Small studios in particular find it more difficult to find sponsors for upcoming projects. Large game productions could be pushed back as not all production steps can be completed whilst people are working from home."*

Felix Falk,
Managing Director at game – Verband der deutschen Games-Branche (Association of the German games industry)
Source: Goldmedia survey, September 2020

# Resilient markets: Streaming, podcasts, games

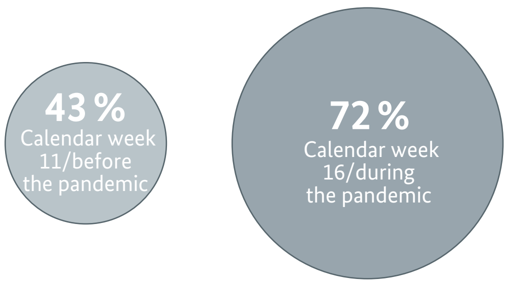
*In 2020, the cultural and creative industries were hit hard by the pandemic, with some sectors losing large parts of their turnover. However, some resilient markets have emerged that are growing despite the pandemic and even benefitted from the temporary lockdown.*

# Resilient markets: Video streaming (SVOD)

Subscription video on demand (SVOD*) registered a considerable increase in usage in 2020, making it one of the winners of the pandemic. Average weekly streaming usage at times reached more than 70% (assessment base: online users with access to SVOD services). Around 26% of the total population over the age of 14 makes daily use of SVOD (1st half year 2020) (Source: Goldmedia VOD-Ratings.com)Streaming providers generated around €1.97 bn in turnover in Germany in 2019.

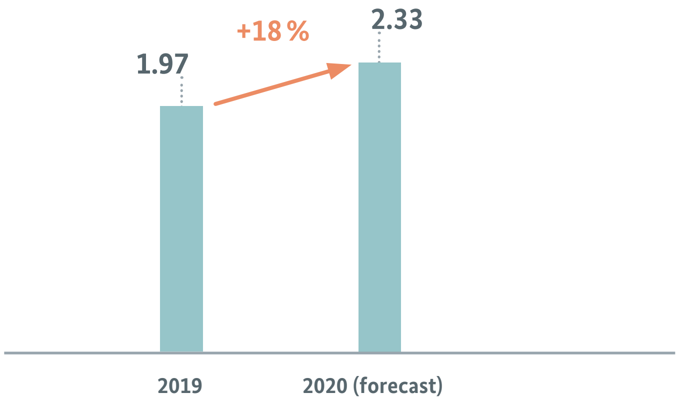
The SVOD market is expected to grow by another 18% in 2020, reaching €2.33 bn in turnover. Amazon Prime Video (33%) and Netflix (23%) were the two most important providers by far on the German market in the second quarter of 2020 in terms of SVOD subscribers. (Source: Goldmedia VOD-Ratings.com).

## Weekly streaming usage (SVOD*) in Germany, 2020

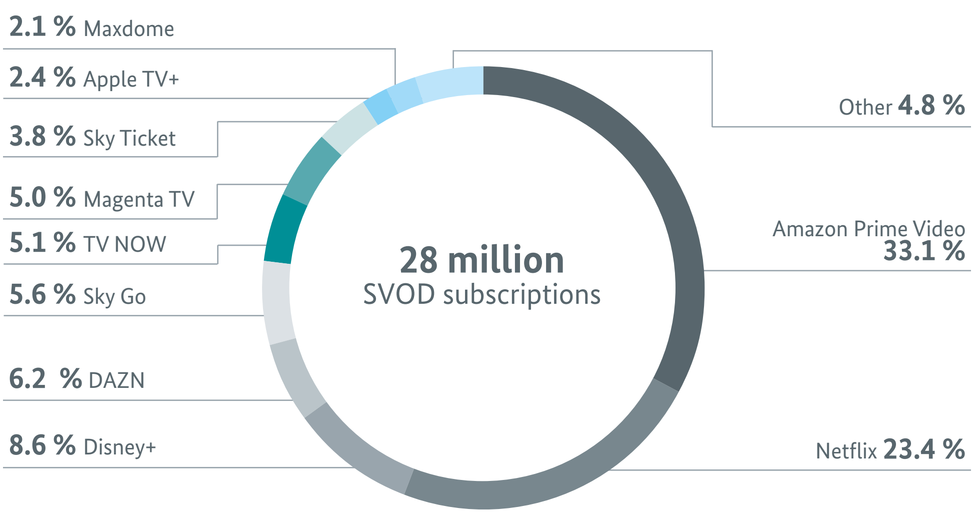



Assessment base: Online users over the age of 14 with access to SVOD services

## Video streaming (SVOD) turnover in Germany, 2019/20 (in € billion)




## Market share of SVOD subscriptions in Germany, Q2/2020



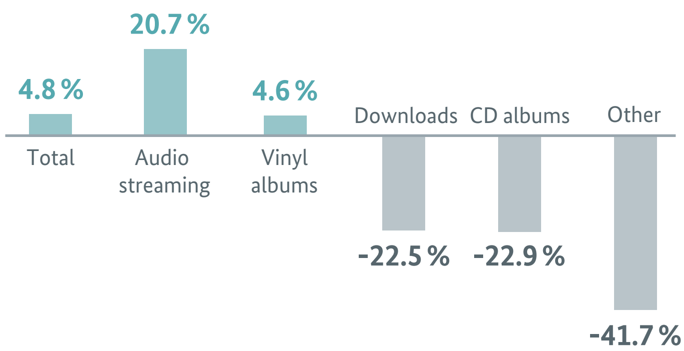

Source: Goldmedia, HMS, Prof Wink; Goldmedia VOD-Ratings.com; *SVOD = subscription video on demand

## Resilient markets: Audio Streaming

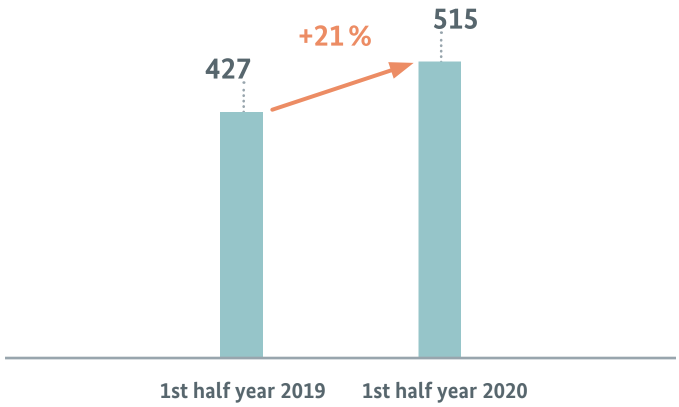
Despite the coronavirus crisis, turnover in the music industry increased in the first half year of 2020. Music streaming and the sale of sound recordings generated €784 million – a plus of 4.8% over the previous year.

The decline in CD album sales (-22.9%) was further accelerated by the crisis, whilst music downloads also fell (-22.5%). However, these turnover losses were offset by the audio streaming market, which continues to grow fast (+20.7%). At around €515 million, audio streaming now accounts for two thirds of total music market turnover (Source: Bundesverband Musikindustrie e. V.).

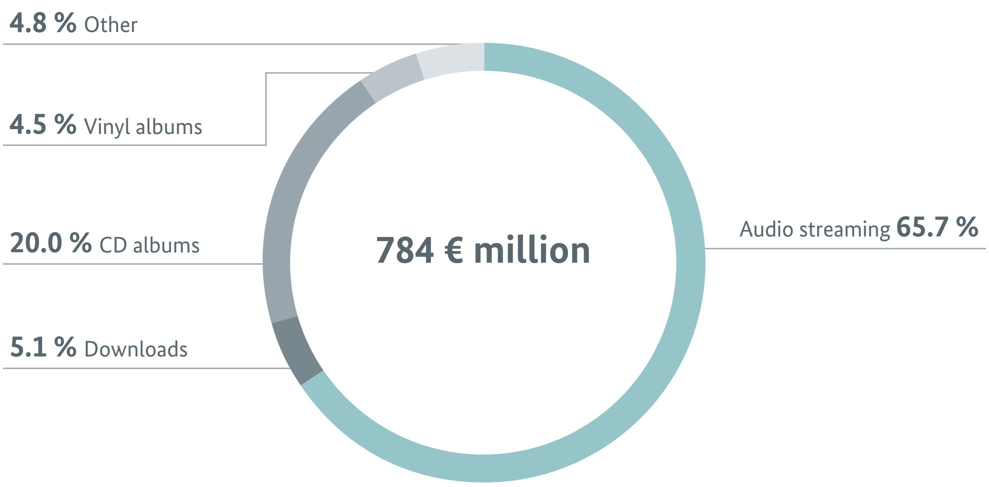
### Growth in the German music industry in 1st half year 2020 vs. 1st half year 2019




### Audio streaming turnover in Germany 1st half year 2019/2020 (in € million)




### Distribution of turnover across the German music industry in 1st half year 2020




Source: Goldmedia, HMS, Prof Wink; Bundesverband Musikindustrie e.V. 2020

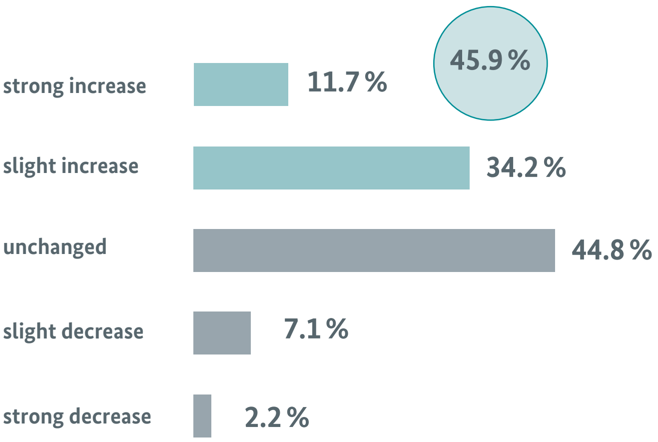
# Resilient markets: Podcasts

Around 15% of the total German-speaking population over the age of 14 listens to audio podcasts. Podcast usage is growing fast. More than half of the podcast listeners (55%) surveyed in July 2020 said they had made greater use of podcasts in the previous 12 months than in the time before. 46% stated that their use of podcasts had increased slightly or strongly compared with the pre-Covid period. (Source: Goldmedia POD-Ratings.com 2020).

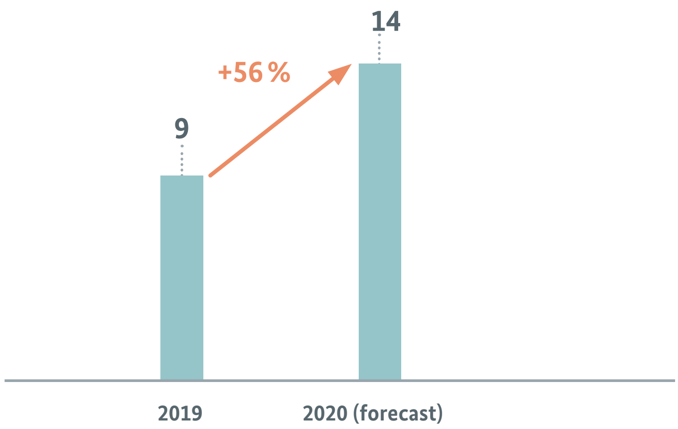
The economic importance of podcasts is also increasing, albeit at a relatively low level. According to the German Association for the Digital Economy (BVDW), podcast ad revenue will reach €14 million in 2020 despite the crisis – that is 56% more than in the previous year (Source: BVDW 2020).

## Change in podcast usage in Germany since the beginning of Covid-19 pandemic (in %)

last update: July 2020, assessment base: podcast users




## Podcast ad revenue in Germany in 2019/2020, (in € million)




Source: Goldmedia, HMS, Prof Wink; Goldmedia POD-Ratings.com 2020 (n=2,219 podcast users); ad revenue: BVDW 2020

## Resilient markets: Games

Almost 1 in 2 Germans (46%) play digital games at least occasionally. This means that this share has grown compared with the previous year. More than every second user stated that they had played more games than before the Covid-19 pandemic (55%). Gaming time also increased considerably, with users playing on average seven hours more per week (Source: BITKOM 2020). Gaming is helping millions of people to better cope with the crisis (Source: game 2020a).

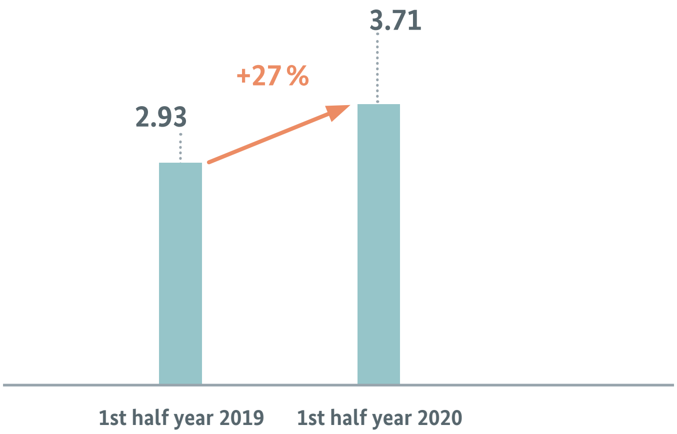
Greater use, higher revenues: turnover generated from games (incl. hardware) increased by 27% in the first half year of 2020 compared with the previous year, exceeding €3.7 billion (Source: game 2020). The games industry is therefore optimistic for the future and expects total turnover to increase in 2020. A number of games companies even expect to generate more revenue than ever before (Source: Gameswirtschaft 2020, Gamesmarkt 2020).

And growth is also pointing upwards for the games industry as a whole. The industry is expected to grow at around 6% each year by 2024 (Source: PWC 2020).

### Share of users in Germany in 2019/2020 who play online games at least occasionally

assessment base: persons over the age of 16


### Development of games turnover in Germany, 1st half year 2019/2020 (in € billion)




Source: Goldmedia, HMS, Prof Wink

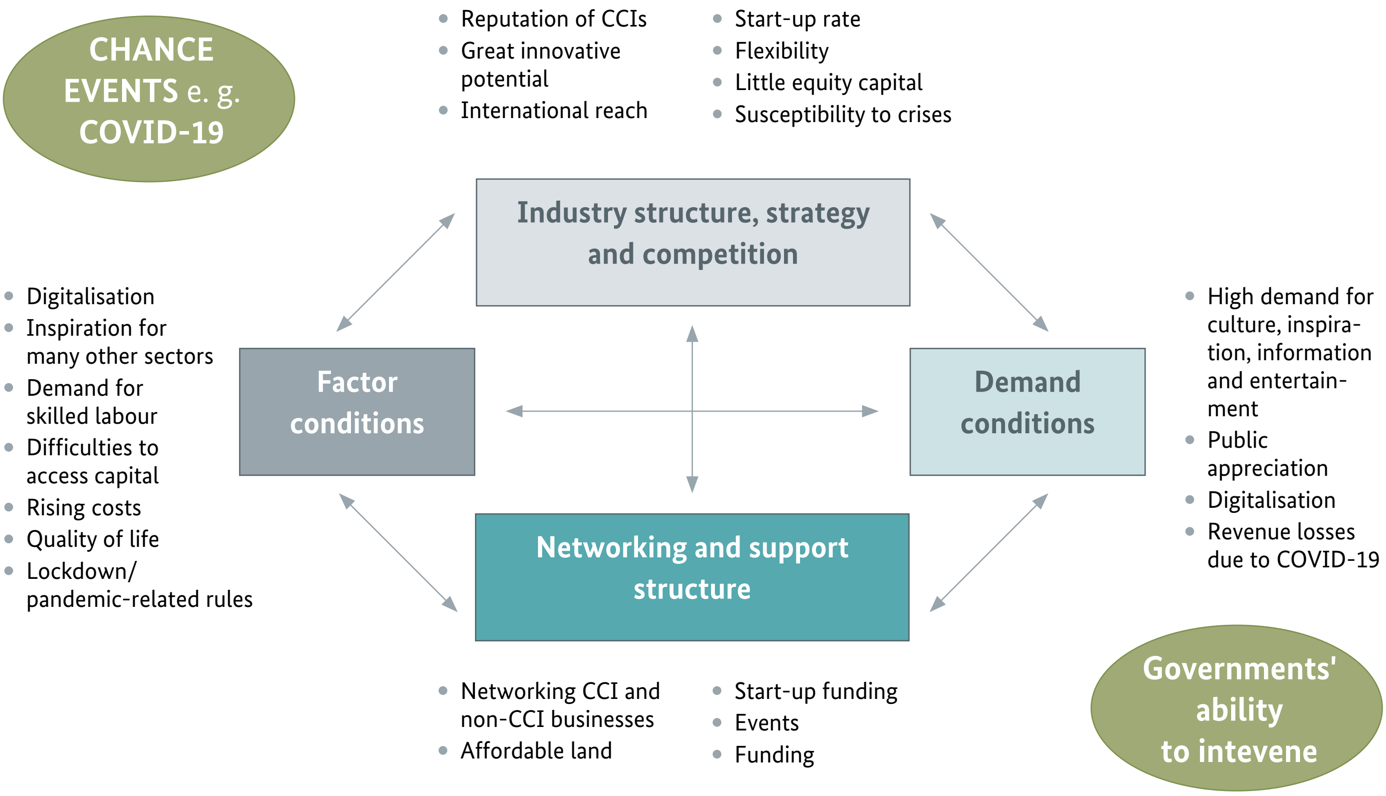
# Regional hubs and clusters

*Germany's cultural and creative industries are spread out across a large number of regional clusters. A regional analysis of employment figures shows where the cultural and creative industries have a particularly strong presence and where growth is most dynamic.*

## Business environment for the cultural and creative industries in Germany

Regional business environments for Germany's cultural and creative industries and the emergence of regional clusters depend on internal structures, strategies and the playing field. They are also shaped by networking and support structures. Factor conditions such as knowledge resources, the availability of skilled labour and demand conditions also play an important role. Furthermore, 'chance events' such as the emergence of Covid-19 and governments' ability to intervene are important factors for understanding the situation of the CCIs.

### Business environment for the cultural and creative industries in Germany in 2020

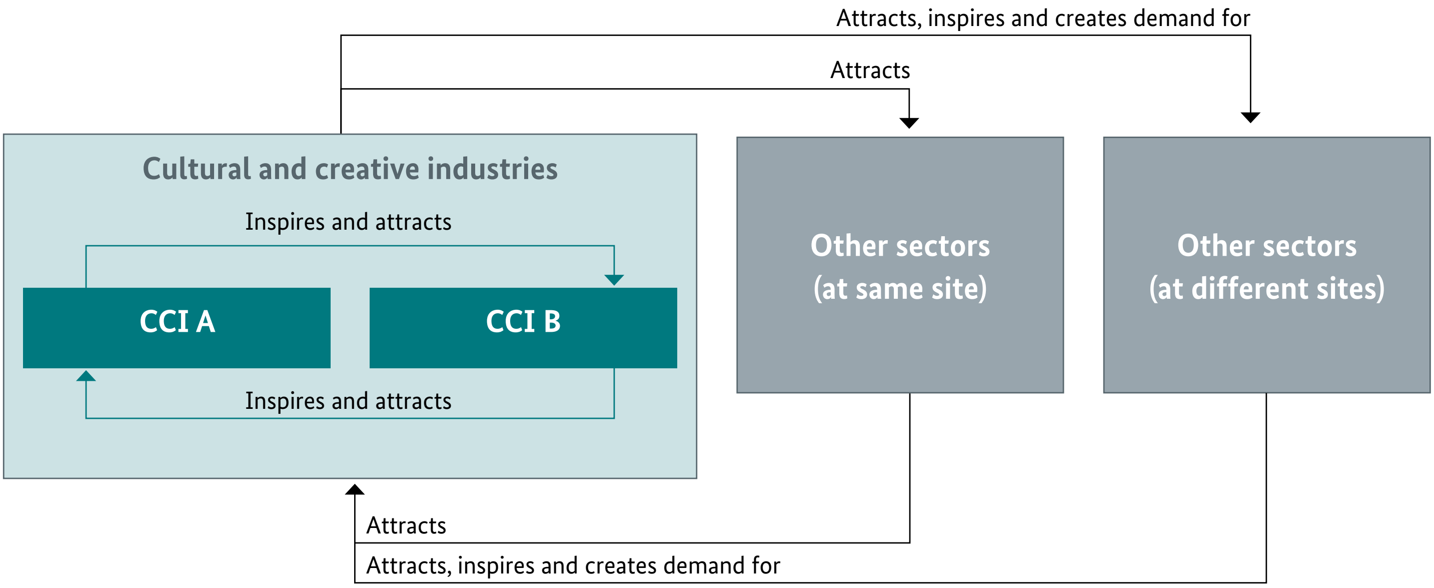



Source: Goldmedia, HMS, Prof. Wink; nach Porter

## The cultural and creative industries as a magnet for other sectors

The cultural and creative industries as a cluster not only attract other CCI businesses, their services are also particularly attractive to businesses from other sectors. This means that the CCIs play a **cross-sectoral role** that makes a region more attractive overall. In a time where workplaces are increasingly moving to the digital and virtual worlds, the question where you work is no longer relevant. As a result, places with an extensive and inspiring cultural offer are becoming more attractive. The CCIs act as a **magnet** for all cluster and regional business promotion activities.

### Model of the CCIs as a cross-sectoral enabler and magnet for other industry clusters at a particular site




Source: Goldmedia, HMS, Prof. Wink

## Regional employment share

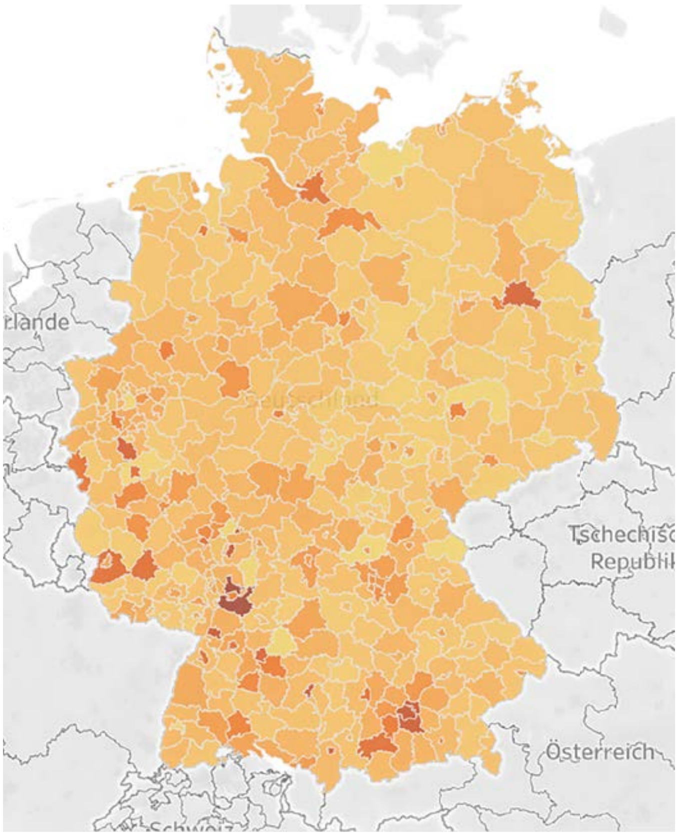
The distribution of the cultural and creative industries in Germany varies greatly between regions. The Monitoring Report has looked at the number of employees working in the cultural and creative industries across all 294 German districts and 107 independent towns and cities. The creative industries account for up to 10% of total employment, the average being around 2%.

In relation to total employment, the Rhein-Neckar district has the highest proportion of CCI employees (9.8%). Software firm SAP is headquartered here. The Rhein-Neckar district is followed by the cities of Munich, Ulm, Karlsruhe and the district around the city of Munich, with a share of just under 8% each.

| | District/town or city | Share of CCI employees in Q2/2019 |
|---|---|---|
| 1 | Rhine-Neckar-district | 9.8 % |
| 2 | Munich | 7.8 % |
| 3 | Ulm | 7.8 % |
| 4 | Karlsruhe | 7.6 % |
| 5 | District around Munich | 7.6 % |
| 6 | Darmstadt | 7.5 % |
| 7 | Cologne | 7.0 % |
| 8 | Offenbach am Main | 6.9 % |
| 9 | Kempten (Allgäu) | 6.8 % |
| 10 | Berlin | 6.8 % |

Share of CCI employees* in the total economy, Q2/2019

0 % 10 %




Source: Goldmedia, HMS, Prof Wink; www.Standortmonitor.net; based on: Federal Employment Agency Q2/2019; *employees subject to social security contributions and persons in marginal employment

## Assessment of growth in proportion of employment provided by CCIs

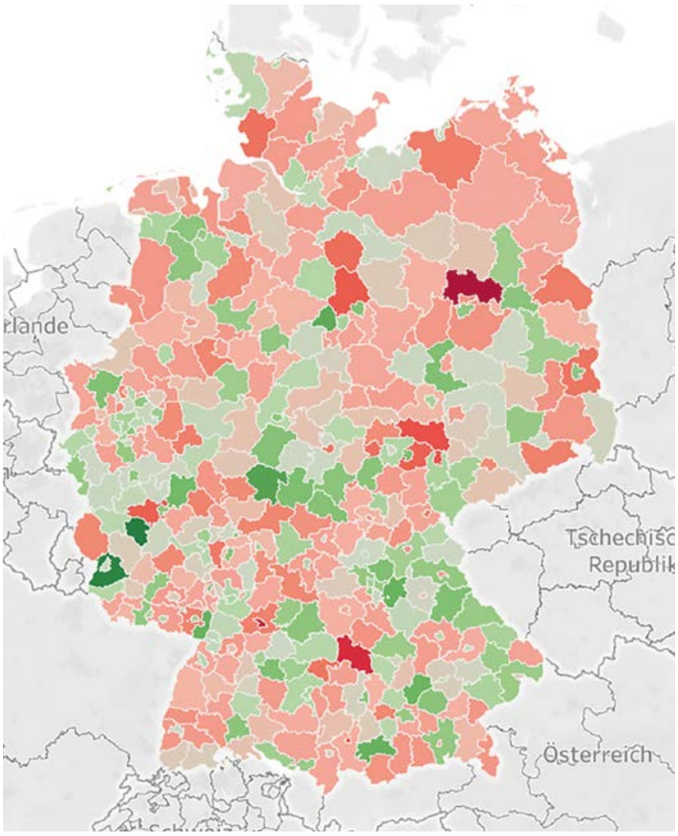
| | District/town or city | CAGR** of the share of CCI employees in Q2/2019 |
|---|---|---|
| 1 | Cochem-Zell | 19.3 % |
| 2 | Trier-Saarburg | 18.3 % |
| 3 | Vogelsbergkreis | 12.1 % |
| 4 | Peine | 10.6 % |
| 5 | Weilheim-Schongau | 9.3 % |
| 6 | Nürnberger Land | 9.2 % |
| 7 | Germersheim | 9.1 % |
| 8 | Freising | 8.6 % |
| 9 | Westerwaldkreis | 7.6 % |
| 10 | Frankenthal (Pfalz) | 7.0 % |

The cultural and creative industries are also growing fast in places that are located far away from the big cities and urban centres. This becomes clear when looking at the development of employment. The share of CCI employees* in the overall economy in some districts increased at a compound annual growth rate (CAGR**) of up to 19% between 2009 and 2019.

The districts showing the fastest proportional growth in the employment share between 2009 and 2009 were the districts of Cochem-Zell, Trier-Saarburg (both located in the Rhineland-Palatinate), Vogelsbergkreis (Hesse) and Peine (Lower Saxony).

### Average growth in CCI employment share in the overall economy, 2009-2019


CAGR** 2009-2019: CCI employment share in the overall economy




Source: Goldmedia, HMS, Prof. Wink; www.standortmonitor.net
*employees subject to social security contributions and persons in marginal employment
** CAGR = Compound Annual Growth Rate.

# Outlook to the unabridged version of the report

*Detailed analysis of the impact of Covid-19 on the individual submarkets of the cultural and creative industries*

*A close look at the games market*

*Analysis of the role of creativity in Germany's creative economy*

*Analysis of best practices in funding non-technical innovation*

## Detailed analysis of the impact of Covid-19 on the film industry

The unabridged version of the Cultural and Creative Industries Monitoring Report will include a detailed analysis for each submarket.

| Segments | Temporary impact of Covid-19 | Duration of recovery | Long-term prospects/ Systemic effect |
|---|---|---|---|
| **Home video (includes WZ categories 'retail sale of music and video recordings' and 'renting of video tapes and disks')** | Even though physical stores temporarily closed, the boom in streaming services, online mail order services and downloads (electronics sell through) of films led to an increase in turnover in the first six months of 2020. | The longer the pandemic and restrictions on movement last, the more attractive it will be to watch films at home. | The pandemic has meant that streaming and online video services have developed even more strongly on the market than predicted. |
| **Motion picture, video and television programme production activities** | Production companies had to suspend, push back or alltogether cancel filming during and after lockdown, resulting in revenue losses of around 20% on average per year depending on the company and genre. Movie productions were particularly hard hit. | The recovery phase already started in June 2020. The production volume is likely to return to pre-Covid levels when the pandemic is over. However, only part of the revenue that was lost in 2020/21 will be recovered. | Shootings had to be reorganised and optimised as more extensive hygiene measures were imposed. This may benefit film productions in the future. |
| **Editing and other cinematic techniques** | Turnover in the post-production industry reflects that of production companies two or three months earlier. Companies in this industry have been affected by the crisis by varying degrees. | The recovery phase started in August 2020 and will continue until next year. | The lessons learned from working from home are something the industry will continue to benefit from. |
| **Cinema** | Cinemas have been dealt a considerable blow. Their revenues fell by more than half in the first half year. | The recovery phase started the moment cinemas were allowed to reopen. With restrictions still in force, cinema-goers afraid of infection and release dates having been pushed back, mainstream films will continue to suffer considerable revenue losses until the pandemic is over. | Even though government assistance programmes have been made available, there remains a risk of market consolidation. |
| **Film distribution (except 'renting of video tapes and disks')** | The situation of distributors who generate income from distributing films to cinemas is somewhat similar to that of cinema operators. For distributors who generate income from selling TV, streaming or home video licences, revenue losses have been less high. | Just like cinemas, distributors will not be able to offset the revenue lost during the pandemic at a later point in time, at least as far as their share in cinemas' receipts is concerned. Recovery will take until the pandemic is over. | Small independent distributors could face insolvency despite government assistance |
| **Independent stage, film, radio and TV artists and other performing arts** | All shooting activities, theatre performances or rehearsals and stage performances were suspended between the middle of March and the beginning of June 2020 or, in some cases, even later. Whilst shootings were in most cases only pushed back, performances were very often cancelled altogether or pushed back at the expense of other performances. | Film actors started to recover in June 2020, however, the recovery of theatres and cabarets was rather slow and did not start before July. It will be almost impossible to offset the revenue lost during the pandemic. | Venues such as theatres, clubs and cabarets are faced with a risk of market consolidation, which is feared will lead to a crowding-out competition at the expense of less well-known artists. |

Source: Goldmedia, HMS, Prof. Wink.

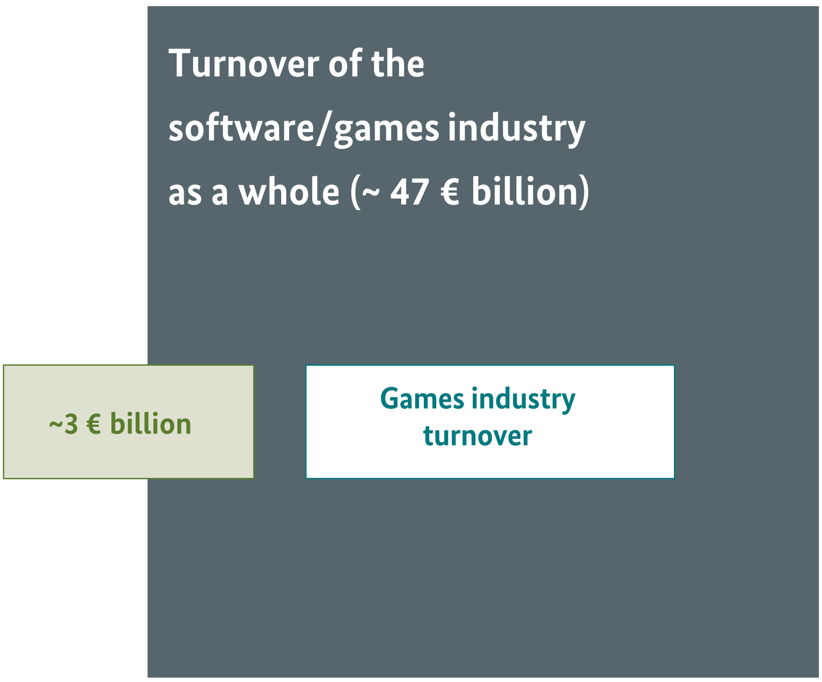
## A close look at games – representation of the German games market

The Cultural and Creative Industries Monitoring Report looks at the games industry as a part of the software/games industry. This important CCI submarket not only includes computer games distribution but also the development and distribution of software, websites and the operation of web portals. This explains why the turnover and employment figures set out in the official statistics for this sector are rather high.

The creative industries statistics of other countries such as the UK also combine the games industry with parts of the software and internet sector (Howkins 2001). However, the interactive software industry – which is in large parts identical to the games industry – is grouped in a different category (DCMS 2001, DCMS 2013).

Official data does not allow for such a nuanced assessment.

### Software/games industry turnover vs. games industry turnover (2018)






Source: In-house assessment by HMS.

## A close look at games – representation of the games industry in official statistics

The games industry – its main segments being (1) production (games development) and (2) distribution (games publishing) – is represented in the official statistics either inadequately or not at all.

Games development is not included in any of the economic activity categories (WZ groups) used in the official statistics but 'tucked away' to an unknown extent in WZ subgroup 'Manufacture of games and toys' and 'Other software development'. The first of these subgroups has up to now not been included in the definition of the software/games industry used by the Monitoring Report. Games publishing could be reflected by the 'Publishing of computer games' group, however, the validity of the official data provided on WZ group 'Publishing of computer games' seems questionable. For example, according to the official statistics, the turnover of games publishers decreased in the last decade, falling from €4 billion in 2009 to around €300 million in 2018, without any explanation given. (Destatis 2020a).

These figures contradict all known data showing that the turnover of games publishers increased over this time period both globally and in Germany (cf. Appendix on methodology in Castendyk/Müller/Schwarz 2020).

In order for the games segment to be represented accurately, it is therefore necessary to include non-official data from existing studies. To that end, the Monitoring Report will use the latest empirical data available on the German games market. This data is based on a collection of quantitative primary data from games industry businesses.

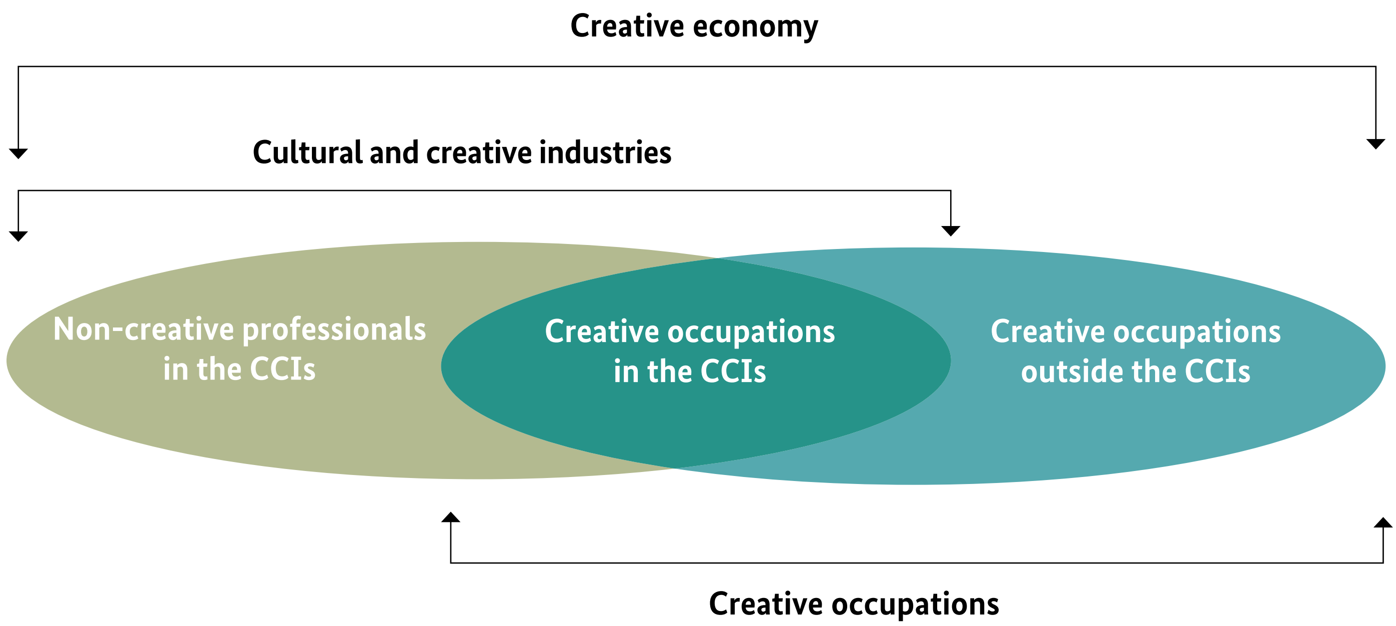
### Selected parts of the 'manufacture of games and toys' under WZ 32.40.0 (Classification of Economic Activities)

- Manufacture of toys
- Manufacture of musical instruments
- Manufacture of board games and similar games
- **Manufacture of electronic games: chess etc.**
- Manufacture of pinball machines, slot machines, billiards, special tables for casino games etc.
- Manufacture of parlour games
- Manufacture of wheeled toys including plastic bicycles and tricycles

Source: Destatis 2008

## Germany's creative economy

Numerous creative occupations exist beyond the cultural and creative industries (for example designers working in the automotive industry). We will estimate how many creative occupations exist outside the CCIs and in what sectors. By doing so, we will for the first time provide an assessment of Germany's creative economy workforce that goes far beyond the submarkets that have been taken into account until now.




Source: Goldmedia, HMS, Prof Wink; based on Creative Economy Switzerland

## Fostering non-technical innovation

The innovation programme for business models and pioneering solutions (IGP) was launched by the Federal Ministry for Economic Affairs and Energy in 2019 and fosters non-technical innovations that are close to the market, particularly from the cultural and creative industries. Prior to this, the funding priority was on technology. The CCIs Monitoring Report has compiled a list of international best practices that foster non-technical innovations both at the company level and as part of regional and urban planning initiatives.

### List of selected international examples for fostering non-technical innovation

| Country | Name | Brief description |
|---|---|---|
| **National** | | |
| **Korea** | Flagship Project Support Program (FPSP) | Provision of funding for open platform models and development of new business models, for example in the areas of smart cars, the internet of things and VR. The programme is to help SMEs overcome market barriers and promote innovation. |
| **Austria** | evolve/services initiative by the Austrian Research Promotion Agency (FFG) | evolve merges individual funding programmes for the creative industries into one holistic plan. The initiative includes project financing, straightforward promotion of cooperation between the creative industries and traditional industries, and the provision of advice/coaching. Under the FFG's services initiative, funding is being provided for innovative services projects that are conducted as part of existing R&D programmes. |
| **Sweden** | Generator Sverige | Generator Sverige is the Swedish initiative for the promotion of the CCIs. Several Swedish regions are members. The initiative's goal is to raise awareness of the CCIs and regional stakeholders, link up developers and companies and individual regions and the government, identify best practices and translate these into political recommendations. |
| **UK** | Creative Industries Clusters Programme | Takes a targeted approach to linking up the CCIs with other sectors, provides funding for 9 R&D partnerships in the UK, 5-year programme with a funding volume of GBP 80 million. |
| **U.S.** | Advanced Manufacturing | Helps SMEs develop new business models and provides tax relief. |
| **Local and regional focus** | | |
| **Netherlands** (Eindhoven, Amsterdam) | Living Labs, smart/sharing approach | Local approaches bringing together creative and technology businesses. |
| **UK** (Leeds, Luton, Somerset/Taunton, Warwick and others) | Creative Places | A wide range of local initiatives and strategies for funding local CCI clusters. |
| **Creative industries ideas applied to specific industry** | | |
| **EU-wide** | Cross4Health | Networking the CCIs with the healthcare industry, for example in the areas of VR/AR and gaming. The EU's Cross4Health funding programme has a budget of €5 million and a duration of three years. It ends in June 2020. |

Source: Goldmedia, HMS, Prof. Wink

# Annex

*Key indicators for the cultural and creative industries*

*Methodological notes*

*Bibliography*

# Key economic indicators for the cultural and creative industries

## Key economic indicators for the cultural and creative industries in 2019 by submarket

| Segments | Number of businesses | Turnover (in € million) | Gross value added (in € million) | Core work-force | Employees subject to social security con-tributions | Employees in marginal employment | Self-em-ployed persons with mini-jobs |
|---|---|---|---|---|---|---|---|
| **Cultural and creative indus-tries (excluding double counts)** | **258,790** | **174,085** | **106,398** | **1,235,767** | **976,977** | **299,467** | **300,044** |
| Overall economy | 3,286,310 | 6,809,420 | 3,092,489 | 36,693,572 | 33,407,262 | 7,886,579 | 2,888,356 |
| Contribution of CCIs to overall economy | 7.87 % | 2.56 % | 3.44 % | 3.37 % | 2.92 % | 3.80 % | 10.39 % |
| **Breakdown by submarket, absolute and percentage figures** | | | | | | | |
| 1. Music industry | 14,670 | 9,039 | 6,197 | 54,769 | 40,099 | 15,741 | 20,370 |
| | 4.70 % | 4.60 % | 5.25 % | 3.99 % | 3.78 % | 4.41 % | 5.48 % |
| 2. Book market | 17,450 | 14,257 | 5,549 | 68,824 | 51,374 | 15,392 | 29,291 |
| | 5.59 % | 7.25 % | 4.70 % | 5.01 % | 4.85 % | 4.32 % | 7.87 % |
| 3. Art market | 12,390 | 2,192 | 1,292 | 17,679 | 5,289 | 3,624 | 27,921 |
| | 3.97 % | 1.11 % | 1.09 % | 1.29 % | 0.50 % | 1.02 % | 7.51 % |
| 4. Film industry | 19,975 | 10,011 | 7,473 | 63,264 | 43,289 | 21,334 | 37,860 |
| | 6.40 % | 5.09 % | 6.33 % | 4.61 % | 4.08 % | 5.98 % | 10.18 % |
| 5. Broadcasting industry | 17,091 | 10,864 | 8,135 | 42,053 | 24,962 | 1,581 | 22,349 |
| | 5.48 % | 5.52 % | 6.90 % | 3.06 % | 2.35 % | 0.44 % | 6.01 % |
| 6. Performing arts market | 21,212 | 5,724 | 8,247 | 48,578 | 27,366 | 21,887 | 40,835 |
| | 6.80 % | 2.91 % | 6.99 % | 3.54 % | 2.58 % | 6.14 % | 10.98 % |
| 7. Design industry | 60,481 | 20,949 | 10,745 | 153,57 | 93,089 | 56,688 | 65,138 |
| | 19.38 % | 10.65 % | 9.11 % | 11.19 % | 8.78 % | 15.90 % | 17.51 % |
| 8. Architecture market | 38,395 | 12,427 | 7,882 | 136,910 | 98,515 | 19,570 | 19,902 |
| | 12.30 % | 6.32 % | 6.68 % | 9.98 % | 9.29 % | 5.49 % | 5.35 % |
| 9. Press market | 31,082 | 30,019 | 12,774 | 141,568 | 110,486 | 75,502 | 28,098 |
| | 9.96 % | 15.26 % | 10.83 % | 10.32 % | 10.42 % | 21.18 % | 7.55 % |
| 10. Advertising market | 29,142 | 29,633 | 11,866 | 157,869 | 128,727 | 94,676 | 24,704 |
| | 9.34 % | 15.07 % | 10.06 % | 11.50 % | 12.14 % | 26.55 % | 6.64 % |
| 11. Software/games industry | 41,963 | 50,166 | 36,712 | 471,983 | 430,020 | 28,957 | 44,774 |
| | 13.45 % | 25.51 % | 31.12 % | 34.39 % | 40.55 % | 8.12 % | 12.04 % |
| 12. Other | 8,197 | 1,378 | 1,095 | 15,328 | 7,131 | 1,605 | 10,741 |
| | 2.63 % | 0.70 % | 0.93 % | 1.12 % | 0.67 % | 0.45 % | 2.89 % |
| **Cultural and creative indus-tries (including double counts)** | **312,048** | **196,661** | **117,965** | **1,372,394** | **1,060,346** | **356,557** | **371,982** |

Please note: Data (partly) based on estimates. Percentage figures calculated based on cultural and creative industries as a whole, including double counts.
Source: Destatis 2020a,b,c; Federal Employment Agency 2020; in-house calculations by Goldmedia.

# Number of businesses

## CCIs by submarket: number of businesses, 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 13,862 | 13,723 | 13,894 | 13,796 | 13,811 | 13,759 | 14,057 | 14,430 | 14,677 | 14,881 | 14,670 |
| 2. Book market | 16,232 | 16,481 | 16,702 | 16,828 | 16,811 | 16,798 | 17,079 | 17,268 | 17,390 | 17,531 | 17,450 |
| 3. Art market | 13,763 | 13,464 | 13,422 | 13,203 | 13,153 | 12,794 | 12,752 | 12,874 | 12,752 | 12,649 | 12,390 |
| 4. Film industry | 18,312 | 17,956 | 18,199 | 18,282 | 18,440 | 18,267 | 18,624 | 19,075 | 19,639 | 20,218 | 19,975 |
| 5. Broadcasting industry | 17,853 | 17,751 | 18,128 | 18,154 | 18,159 | 18,074 | 18,179 | 17,880 | 17,492 | 17,339 | 17,091 |
| 6. Performing arts market | 14,993 | 15,402 | 15,982 | 16,497 | 17,004 | 17,473 | 18,249 | 19,080 | 19,929 | 20,786 | 21,212 |
| 7. Design industry | 48,332 | 50,111 | 52,439 | 53,676 | 54,454 | 55,624 | 57,127 | 58,431 | 59,323 | 60,307 | 60,481 |
| 8. Architecture market | 39,956 | 40,159 | 40,702 | 40,762 | 40,205 | 40,040 | 39,849 | 39,691 | 39,144 | 38,723 | 38,395 |
| 9. Press market | 34,317 | 33,564 | 33,498 | 33,131 | 32,557 | 32,119 | 32,341 | 32,241 | 31,828 | 31,590 | 31,082 |
| 10. Advertising market | 37,082 | 35,330 | 34,577 | 33,448 | 32,107 | 30,855 | 30,221 | 30,220 | 29,892 | 29,562 | 29,142 |
| 11. Software/games industry | 27,018 | 28,527 | 30,413 | 31,915 | 33,365 | 34,725 | 35,933 | 37,375 | 38,803 | 40,561 | 41,963 |
| 12. Other | 7,353 | 7,506 | 7,736 | 7,751 | 7,812 | 7,775 | 7,887 | 8,249 | 8,254 | 8,140 | 8,197 |
| Total, including double counts | 289,073 | 289,974 | 295,692 | 297,442 | 297,877 | 298,302 | 302,298 | 306,813 | 309,122 | 312,287 | 312,048 |
| Double counts | 50,594 | 50,440 | 51,402 | 51,627 | 51,525 | 51,336 | 51,859 | 52,330 | 52,523 | 52,938 | 53,258 |
| **CCIs (excluding double counts)** | **238,479** | **239,534** | **244,290** | **245,816** | **246,353** | **246,967** | **250,439** | **254,484** | **256,600** | **259,349** | **258,790** |
| Overall economy | 3,135,542 | 3,165,286 | 3,215,095 | 3,250,319 | 3,243,538 | 3,240,221 | 3,255,537 | 3,266,429 | 3,266,806 | 3,279,136 | 3,286,310 |
| *Contribution of CCIs to overall economy* | *7.61 %* | *7.57 %* | *7.60 %* | *7.56 %* | *7.60 %* | *7.62 %* | *7.69 %* | *7.79 %* | *7.85 %* | *7.91 %* | *7.87 %* |

Please note: *Data for 2019 are estimates. Source: VAT statistics, Destatis 2020a; in-house calculations by Goldmedia.

# Turnover

## CCIs by submarket: turnover (in € million), 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 6,307 | 6,270 | 6,639 | 7,099 | 7,674 | 7,896 | 8,178 | 8,139 | 8,440 | 8,685 | 9,039 |
| 2. Book market | 14,848 | 14,182 | 14,255 | 14,032 | 13,737 | 13,686 | 13,657 | 14,024 | 13,910 | 14,077 | 14,257 |
| 3. Art market | 2,146 | 2,332 | 2,341 | 2,316 | 2,292 | 2,091 | 2,170 | 2,249 | 2,252 | 2,223 | 2,192 |
| 4. Film industry | 8,734 | 8,925 | 9,283 | 9,228 | 9,060 | 9,328 | 9,844 | 9,572 | 9,987 | 9,874 | 10,011 |
| 5. Broadcasting industry | 7,445 | 7,671 | 7,905 | 8,327 | 8,942 | 9,378 | 9,578 | 9,892 | 10,334 | 10,657 | 10,864 |
| 6. Performing arts market | 3,316 | 3,478 | 3,742 | 3,909 | 3,971 | 4,262 | 4,502 | 4,770 | 5,244 | 5,604 | 5,724 |
| 7. Design industry | 17,595 | 18,243 | 18,353 | 18,535 | 18,338 | 18,566 | 19,078 | 19,764 | 20,321 | 20,604 | 20,949 |
| 8. Architecture market | 7,967 | 8,031 | 8,708 | 8,813 | 9,130 | 9,554 | 10,236 | 10,700 | 11,348 | 11,943 | 12,427 |
| 9. Press market | 31,341 | 31,398 | 31,711 | 31,931 | 31,065 | 30,657 | 30,133 | 30,054 | 29,820 | 29,416 | 30,019 |
| 10. Advertising market | 25,508 | 25,714 | 24,929 | 24,965 | 25,175 | 26,130 | 27,033 | 29,405 | 30,078 | 29,975 | 29,633 |
| 11. Software/games industry | 24,296 | 26,496 | 28,442 | 29,642 | 29,418 | 31,619 | 34,362 | 37,727 | 41,632 | 46,655 | 50,166 |
| 12. Other | 1,578 | 1,588 | 1,652 | 1,587 | 1,531 | 1,418 | 1,381 | 1,425 | 1,454 | 1,411 | 1,378 |
| Total, including double counts | 151,080 | 154,327 | 157,960 | 160,385 | 160,332 | 164,586 | 170,151 | 177,720 | 184,820 | 191,123 | 196,661 |
| Double counts | 16,751 | 16,993 | 16,990 | 17,047 | 17,178 | 17,691 | 18,084 | 18,906 | 19,633 | 20,072 | 22,576 |
| **CCIs (excluding double counts)** | **134,329** | **137,333** | **140,970** | **143,338** | **143,155** | **146,895** | **152,067** | **158,814** | **165,187** | **171,051** | **174,085** |
| Overall economy | 4,897,938 | 5,240,997 | 5,687,179 | 5,752,249 | 5,765,567 | 5,870,875 | 5,989,743 | 6,088,287 | 6,360,802 | 6,622,777 | 6,809,420 |
| *Contribution of CCIs to overall economy* | *2.74 %* | *2.62 %* | *2.48 %* | *2.49 %* | *2.48 %* | *2.50 %* | *2.54 %* | *2.61 %* | *2.60 %* | *2.58 %* | *2.56 %* |

Please note: *Data for 2019 are estimates. Source: VAT statistics, Destatis 2020a; in-house calculations by Goldmedia.

# Core workforce

## CCIs by submarket: core workforce 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 46,827 | 46,698 | 46,627 | 46,533 | 47,493 | 47,941 | 48,496 | 50,533 | 52,147 | 54,001 | 54,769 |
| 2. Book market | 78,846 | 76,860 | 79,504 | 78,846 | 78,157 | 75,917 | 73,048 | 71,836 | 71,031 | 69,111 | 68,824 |
| 3. Art market | 19,424 | 19,161 | 18,945 | 18,912 | 18,793 | 18,249 | 18,177 | 18,292 | 18,132 | 17,925 | 17,679 |
| 4. Film industry | 58,503 | 57,313 | 57,772 | 57,633 | 57,090 | 57,429 | 58,866 | 59,712 | 61,615 | 62,155 | 63,264 |
| 5. Broadcasting industry | 38,890 | 38,881 | 39,694 | 39,865 | 41,353 | 41,688 | 42,477 | 42,420 | 42,351 | 42,293 | 42,053 |
| 6. Performing arts market | 32,298 | 33,225 | 34,112 | 35,389 | 37,886 | 38,805 | 40,278 | 42,158 | 44,189 | 46,846 | 48,578 |
| 7. Design industry | 125,452 | 125,878 | 128,427 | 131,767 | 134,274 | 137,262 | 141,297 | 145,593 | 149,893 | 152,551 | 153,570 |
| 8. Architecture market | 100,082 | 101,897 | 105,087 | 107,750 | 110,169 | 112,775 | 116,695 | 121,688 | 126,950 | 132,031 | 136,910 |
| 9. Press market | 168,312 | 163,305 | 161,101 | 158,860 | 156,097 | 152,409 | 150,380 | 148,641 | 147,021 | 143,863 | 141,568 |
| 10. Advertising market | 140,958 | 137,006 | 138,881 | 140,431 | 140,562 | 142,978 | 145,863 | 150,715 | 154,170 | 156,535 | 157,869 |
| 11. Software/games industry | 243,807 | 251,708 | 268,456 | 299,427 | 321,092 | 337,923 | 358,800 | 381,364 | 408,169 | 439,474 | 471,983 |
| 12. Other | 15,346 | 14,991 | 15,182 | 15,436 | 15,548 | 15,104 | 15,140 | 15,376 | 15,433 | 15,388 | 15,328 |
| Total, including double counts | 1,068,745 | 1,066,923 | 1,093,788 | 1,130,848 | 1,158,513 | 1,178,480 | 1,209,516 | 1,248,326 | 1,291,100 | 1,332,174 | 1,372,394 |
| Double counts | 115,637 | 114,403 | 117,016 | 119,119 | 121,245 | 122,442 | 124,589 | 128,246 | 131,474 | 134,414 | 136,626 |
| **CCIs (excluding double counts)** | **953,108** | **952,520** | **976,772** | **1,011,729** | **1,037,268** | **1,056,038** | **1,084,927** | **1,120,080** | **1,159,626** | **1,197,760** | **1,235,767** |
| Overall economy | *30,738,823* | *31,131,887* | *31,858,678* | *32,530,353* | *32,859,218* | *33,414,726* | *34,026,834* | *34,709,747* | *35,431,779* | *36,149,364* | *36,693,572* |
| *Contribution of CCIs to overall economy* | *3.10 %* | *3.06 %* | *3.07 %* | *3.11 %* | *3.16 %* | *3.16 %* | *3.19 %* | *3.23 %* | *3.27 %* | *3.31 %* | *3.37 %* |

Please note: *2019 figures concerning the number of self-employed persons have been estimated (based on the number of businesses).
Source: VAT statistics, Destatis, 2020a, Employment Statistics, Federal Employment Agency 2020; in-house calculations by Goldmedia.

# Employees subject to social security contributions

## CCIs by submarket: employees subject to social security contributions, 2009 – 2019

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 32,965 | 32,975 | 32,733 | 32,737 | 33,682 | 34,182 | 34,439 | 36,103 | 37,470 | 39,120 | 40,099 |
| 2. Book market | 62,614 | 60,379 | 62,802 | 62,018 | 61,346 | 59,119 | 55,969 | 54,568 | 53,641 | 51,580 | 51,374 |
| 3. Art market | 5,661 | 5,697 | 5,523 | 5,709 | 5,641 | 5,455 | 5,425 | 5,419 | 5,380 | 5,276 | 5,289 |
| 4. Film industry | 40,191 | 39,357 | 39,573 | 39,351 | 38,650 | 39,162 | 40,242 | 40,637 | 41,976 | 41,937 | 43,289 |
| 5. Broadcasting industry | 21,037 | 21,130 | 21,566 | 21,711 | 23,194 | 23,614 | 24,298 | 24,540 | 24,859 | 24,954 | 24,962 |
| 6. Performing arts market | 17,305 | 17,823 | 18,130 | 18,892 | 20,882 | 21,332 | 22,029 | 23,078 | 24,260 | 26,060 | 27,366 |
| 7. Design industry | 77,120 | 75,767 | 75,988 | 78,091 | 79,820 | 81,639 | 84,170 | 87,162 | 90,570 | 92,244 | 93,089 |
| 8. Architecture market | 60,126 | 61,738 | 64,385 | 66,988 | 69,964 | 72,735 | 76,846 | 81,997 | 87,806 | 93,308 | 98,515 |
| 9. Press market | 133,995 | 129,741 | 127,603 | 125,729 | 123,540 | 120,290 | 118,039 | 116,400 | 115,193 | 112,273 | 110,486 |
| 10. Advertising market | 103,876 | 101,676 | 104,304 | 106,983 | 108,455 | 112,123 | 115,642 | 120,495 | 124,278 | 126,973 | 128,727 |
| 11. Software/games industry | 216,789 | 223,181 | 238,043 | 267,512 | 287,727 | 303,198 | 322,867 | 343,989 | 369,366 | 398,913 | 430,020 |
| 12. Other | 7,993 | 7,485 | 7,446 | 7,685 | 7,736 | 7,329 | 7,253 | 7,127 | 7,179 | 7,248 | 7,131 |
| Total, including double counts | 779,672 | 776,949 | 798,096 | 833,406 | 860,636 | 880,178 | 907,218 | 941,513 | 981,978 | 1,019,887 | 1,060,346 |
| Double counts | 65,043 | 63,963 | 65,614 | 67,492 | 69,721 | 71,107 | 72,731 | 75,917 | 78,952 | 81,476 | 83,368 |
| **CCIs (excluding double counts)** | **714,629** | **712,986** | **732,483** | **765,913** | **790,915** | **809,071** | **834,488** | **865,597** | **903,026** | **938,411** | **976,977** |
| Overall economy | *27,603,281* | *27,966,601* | *28,643,583* | *29,280,034* | *29,615,680* | *30,174,505* | *30,771,297* | *31,443,318* | *32,164,973* | *32,870,228* | *33,407,262* |
| *Contribution of CCIs to overall economy* | *2.59 %* | *2.55 %* | *2.56 %* | *2.62 %* | *2.67 %* | *2.68 %* | *2.71 %* | *2.75 %* | *2.81 %* | *2.85 %* | *2.92 %* |

Source: Employment Statistics, Federal Employment Agency 2020; in-house calculations by Goldmedia.

# Persons in marginal employment

## CCIs by submarket: persons in marginal employment, 2009 – 2019

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 11,857 | 11,916 | 12,128 | 12,671 | 12,902 | 13,213 | 13,423 | 13,863 | 14,675 | 15,415 | 15,741 |
| 2. Book market | 21,288 | 20,920 | 20,374 | 19,766 | 18,959 | 18,320 | 17,610 | 17,188 | 16,471 | 15,804 | 15,392 |
| 3. Art market | 4,591 | 4,472 | 4,395 | 4,355 | 4,290 | 4,178 | 4,046 | 3,999 | 3,882 | 3,763 | 3,624 |
| 4. Film industry | 29,179 | 28,317 | 26,928 | 26,368 | 25,994 | 24,920 | 24,185 | 23,332 | 22,955 | 21,896 | 21,334 |
| 5. Broadcasting industry | 2,142 | 2,045 | 1,750 | 1,723 | 1,841 | 1,842 | 1,752 | 1,785 | 1,766 | 1,644 | 1,581 |
| 6. Performing arts market | 12,804 | 13,011 | 13,715 | 14,754 | 15,806 | 16,450 | 17,084 | 17,998 | 19,476 | 20,741 | 21,887 |
| 7. Design industry | 65,288 | 66,974 | 63,977 | 62,114 | 61,783 | 65,410 | 56,513 | 60,399 | 60,779 | 58,512 | 56,688 |
| 8. Architecture market | 18,116 | 18,080 | 18,391 | 18,462 | 19,109 | 19,369 | 18,892 | 18,989 | 19,279 | 19,483 | 19,570 |
| 9. Press market | 134,817 | 133,704 | 131,207 | 130,370 | 123,373 | 113,233 | 89,870 | 84,448 | 81,751 | 78,005 | 75,502 |
| 10. Advertising market | 119,006 | 123,173 | 115,272 | 110,736 | 104,008 | 111,445 | 95,069 | 101,754 | 102,467 | 98,142 | 94,676 |
| 11. Software/games industry | 20,715 | 21,196 | 22,373 | 23,732 | 24,841 | 25,900 | 25,507 | 26,961 | 27,863 | 28,507 | 28,957 |
| 12. Other | 1,914 | 1,773 | 1,754 | 1,682 | 1,652 | 1,614 | 1,576 | 1,634 | 1,698 | 1,614 | 1,605 |
| Total, including double counts | 441,717 | 445,581 | 432,264 | 426,733 | 414,558 | 415,894 | 365,526 | 372,349 | 373,063 | 363,525 | 356,557 |
| Double counts | 64,647 | 66,253 | 63,461 | 61,777 | 61,739 | 65,737 | 57,475 | 61,850 | 63,012 | 61,631 | 57,090 |
| **CCIs (excluding double counts)** | **377,070** | **379,328** | **368,803** | **364,956** | **352,819** | **350,158** | **308,051** | **310,499** | **310,051** | **301,894** | **299,467** |
| Overall economy | *7,359,609* | *7,450,194* | *7,536,790* | *7,591,384* | *7,716,104* | *7,811,376* | *7,704,750* | *7,763,218* | *7,806,047* | *7,878,276* | *7,886,579* |
| *Contribution of CCIs to overall economy* | *5.12 %* | *5.09 %* | *4.89 %* | *4.81 %* | *4.57 %* | *4.48 %* | *4.00 %* | *4.00 %* | *3.97 %* | *3.83 %* | *3.80 %* |

Source: Employment Statistics, Federal Employment Agency 2020; in-house calculations by Goldmedia.

# Self-employed persons with mini-jobs

## CCIs by submarket: self-employed persons with mini-jobs, 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 16,780 | 16,844 | 16,949 | 16,967 | 17,215 | 17,344 | 17,792 | 18,857 | 19,581 | 20,363 | 20,370 |
| 2. Book market | 21,065 | 21,712 | 22,475 | 23,217 | 24,365 | 24,837 | 25,910 | 26,876 | 27,935 | 29,023 | 29,291 |
| 3. Art market | 27,167 | 26,755 | 26,462 | 26,631 | 26,915 | 26,795 | 26,826 | 27,586 | 27,834 | 28,081 | 27,921 |
| 4. Film industry | 29,008 | 29,407 | 29,993 | 30,979 | 32,016 | 32,384 | 33,206 | 34,915 | 36,525 | 38,214 | 37,860 |
| 5. Broadcasting industry | 21,526 | 21,857 | 21,924 | 21,998 | 22,277 | 22,533 | 22,713 | 22,665 | 22,408 | 22,439 | 22,349 |
| 6. Performing arts market | 27,333 | 28,007 | 29,049 | 30,647 | 32,199 | 32,871 | 34,350 | 36,271 | 38,076 | 39,977 | 40,835 |
| 7. Design industry | 49,796 | 51,249 | 52,324 | 53,946 | 56,827 | 57,694 | 59,634 | 61,619 | 63,088 | 64,735 | 65,138 |
| 8. Architecture market | 26,160 | 25,304 | 24,459 | 23,601 | 23,321 | 22,578 | 21,971 | 21,633 | 21,006 | 20,436 | 19,902 |
| 9. Press market | 28,303 | 28,615 | 28,363 | 28,158 | 28,182 | 28,315 | 28,593 | 28,554 | 28,275 | 28,272 | 28,098 |
| 10. Advertising market | 34,036 | 31,639 | 29,639 | 28,166 | 27,101 | 25,783 | 25,372 | 25,421 | 25,212 | 25,003 | 24,704 |
| 11. Software/games industry | 29,424 | 30,643 | 31,527 | 32,937 | 34,754 | 36,445 | 38,478 | 39,616 | 41,251 | 43,226 | 44,774 |
| 12. Other | 9,988 | 9,849 | 9,700 | 9,813 | 9,996 | 9,988 | 10,179 | 10,699 | 10,729 | 10,637 | 10,741 |
| Total, including double counts | 320,586 | 321,881 | 322,864 | 327,060 | 335,168 | 337,567 | 345,024 | 354,711 | 361,922 | 370,407 | 371,982 |
| Double counts | 64,635 | 64,668 | 64,787 | 65,420 | 66,500 | 66,650 | 67,805 | 69,610 | 70,828 | 72,408 | 71,937 |
| **CCIs (excluding double counts)** | **255,951** | **257,213** | **258,077** | **261,640** | **268,668** | **270,917** | **277,219** | **285,101** | **291,094** | **297,999** | **300,044** |
| Overall economy | 2,362,033 | 2,455,896 | 2,557,554 | 2,648,333 | 2,740,942 | 2,747,405 | 2,792,210 | 2,811,454 | 2,837,088 | 2,862,722 | 2,888,356 |
| *Contribution of CCIs to overall economy* | *10.84 %* | *10.47 %* | *10.09 %* | *9.88 %* | *9.80 %* | *9.86 %* | *9.93 %* | *10.14 %* | *10.26 %* | *10.41 %* | *10.39 %* |

Please note: *Data is based on estimates. In deviation from previous studies, the data provided on self-employed persons with mini-jobs is based on a special analysis of the Federal Statistical.
Source: VAT assessment statistics, Destatis 2020b; in-house calculations by Goldmedia.

# Gross value added

## CCIs by submarket: gross value added (in € million), 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 4,460 | 4,290 | 4,496 | 4,911 | 5,424 | 5,514 | 5,635 | 5,680 | 5,734 | 5,954 | 6,197 |
| 2. Book market | 4,692 | 4,686 | 4,978 | 4,962 | 4,980 | 5,040 | 5,055 | 5,338 | 5,394 | 5,479 | 5,549 |
| 3. Art market | 1,234 | 1,328 | 1,216 | 1,255 | 1,219 | 1,163 | 1,220 | 1,279 | 1,302 | 1,310 | 1,292 |
| 4. Film industry | 7,358 | 7,317 | 7,496 | 7,556 | 7,685 | 7,694 | 7,834 | 8,183 | 7,518 | 7,370 | 7,473 |
| 5. Broadcasting industry | 6,318 | 6,357 | 6,463 | 6,907 | 7,650 | 7,776 | 7,664 | 8,482 | 7,741 | 7,980 | 8,135 |
| 6. Performing arts market | 5,475 | 6,182 | 6,325 | 6,625 | 6,549 | 6,625 | 6,937 | 6,917 | 7,704 | 8,075 | 8,247 |
| 7. Design industry | 9,034 | 9,404 | 9,502 | 9,738 | 10,268 | 9,826 | 9,948 | 10,686 | 10,307 | 10,570 | 10,745 |
| 8. Architecture market | 4,682 | 4,723 | 4,927 | 5,241 | 5,723 | 5,967 | 6,607 | 6,544 | 7,197 | 7,574 | 7,882 |
| 9. Press market | 10,359 | 10,983 | 11,993 | 12,274 | 12,274 | 12,505 | 12,493 | 12,497 | 12,699 | 12,517 | 12,774 |
| 10. Advertising market | 10,653 | 11,053 | 10,894 | 10,746 | 11,867 | 11,651 | 11,508 | 11,956 | 12,044 | 12,002 | 11,866 |
| 11. Software/games industry | 15,287 | 16,973 | 19,758 | 21,509 | 23,263 | 25,163 | 26,382 | 28,616 | 30,496 | 34,142 | 36,712 |
| 12. Other | 1,435 | 1,353 | 1,322 | 1,332 | 1,272 | 1,113 | 1,109 | 1,260 | 1,154 | 1,121 | 1,095 |
| Total, including double counts | 80,987 | 84,647 | 89,368 | 93,056 | 98,173 | 100,036 | 102,392 | 107,438 | 109,289 | 114,093 | 117,965 |
| Double counts | 9,157 | 9,416 | 9,548 | 9,663 | 10,110 | 10,154 | 10,227 | 10,356 | 10,916 | 11,299 | 11,567 |
| **CCIs (excluding double counts)** | **71,830** | **75,232** | **79,820** | **83,393** | **88,063** | **89,882** | **92,164** | **97,082** | **98,373** | **102,794** | **106,398** |
| Overall economy | *2,192,834* | *2,305,684* | *2,418,099* | *2,465,800* | *2,527,883* | *2,635,393* | *2,725,924* | *2,821,803* | *2,922,328* | *3,012,310* | *3,092,489* |
| *Contribution of CCIs to overall economy* | *3.28 %* | *3.26 %* | *3.30 %* | *3.38 %* | *3.48 %* | *3.41 %* | *3.38 %* | *3.44 %* | *3.37 %* | *3.41 %* | *3.44 %* |

Please note: *Data for 2019 are estimates.
Source: VAT statistics, Destatis 2020a, National Accounts, Destatis 2020c; in-house calculations by Goldmedia.

# Turnover per core worker

## CCIs by submarket: turnover per core worker (in €), 2009 – 2019*

| Submarket | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019* |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Music industry | 134,690 | 134,258 | 142,386 | 152,557 | 161,580 | 164,709 | 168,642 | 161,057 | 161,851 | 160,823 | 165,041 |
| 2. Book market | 188,312 | 184,514 | 179,300 | 177,966 | 175,759 | 180,280 | 186,961 | 195,216 | 195,826 | 203,691 | 207,154 |
| 3. Art market | 110,473 | 121,694 | 123,554 | 122,463 | 121,940 | 114,567 | 119,355 | 122,925 | 124,221 | 124,004 | 123,999 |
| 4. Film industry | 149,289 | 155,728 | 160,688 | 160,109 | 158,692 | 162,427 | 167,220 | 160,307 | 162,092 | 158,859 | 158,243 |
| 5. Broadcasting industry | 191,438 | 197,287 | 199,160 | 208,883 | 216,232 | 224,954 | 225,485 | 233,199 | 243,997 | 251,977 | 258,333 |
| 6. Performing arts market | 102,670 | 104,668 | 109,700 | 110,469 | 104,819 | 109,833 | 111,763 | 113,157 | 118,668 | 119,625 | 117,827 |
| 7. Design industry | 140,251 | 144,924 | 142,904 | 140,668 | 136,572 | 135,261 | 135,024 | 135,748 | 135,574 | 135,066 | 136,414 |
| 8. Architecture market | 79,602 | 78,819 | 82,864 | 81,795 | 82,875 | 84,718 | 87,720 | 87,932 | 89,387 | 90,454 | 90,771 |
| 9. Press market | 186,208 | 192,266 | 196,838 | 200,999 | 199,014 | 201,149 | 200,381 | 202,189 | 202,825 | 225,651 | 233,626 |
| 10. Advertising market | 180,960 | 187,687 | 179,501 | 177,777 | 179,102 | 182,758 | 185,329 | 195,101 | 195,099 | 191,488 | 187,709 |
| 11. Software/games industry | 99,652 | 105,265 | 105,947 | 98,996 | 91,618 | 93,570 | 95,768 | 98,927 | 101,997 | 106,161 | 106,289 |
| 12. Other | 102,856 | 105,903 | 108,788 | 102,846 | 98,452 | 93,862 | 91,211 | 92,672 | 94,238 | 91,673 | 89,916 |
| **CCIs (excluding double counts)** | **140.938** | **144.179** | **144.323** | **141.677** | **138.011** | **139.100** | **140.164** | **141.788** | **142.449** | **142.896** | **140.871** |
| Overall economy | *159.340* | *168.348* | *178.513* | *176.827* | *175.463* | *175.697* | *176.030* | *175.406* | *179.523* | *183.206* | *185.575* |
| *Contribution of CCIs to overall economy* | *-13.06 %* | *-16.76 %* | *-23.69 %* | *-24.81 %* | *-27.14 %* | *-26.31 %* | *-25.59 %* | *-23.71 %* | *-26.03 %* | *-28.21 %* | *-31.73 %* |

Please note: *Data for 2019 are estimates.
Source: VAT statistics, Destatis, 2020a, Employment Statistics, Federal Employment Agency 2020; in-house calculations by Goldmedia.

## Scope of the cultural and creative industries by submarket

According to the recommendations given by the Conference of Economic Affairs Ministers, the cultural and creative industries consist of eleven submarkets which span a varying number of economic activities (WZ groups). The twelfth group entitled 'Other' consists of those CCI-related economic activities which do not fit into any of the eleven submarkets.

The economic activities (WZ groups) are taken into account in the calculation of economic indicators and employment figures either fully (100%) or to a pre-determined percentage. There are some overlaps between the submarkets (for example the organisation of theatre performances and concerts is partly counted towards the music industry and partly to the performing arts market).

| Submarket WZ 2018 | Economic activity | Percentage of companies and turnover | Percentage of employees |
|---|---|---|---|
| **1. Music industry** | | | |
| 32.20 | Manufacture of musical instruments | 100 | 100 |
| 47.59.3 | Retail sale of musical instruments, etc. | 100 | 100 |
| 47.63 | Retail sale of music and video recordings, etc.* | 100 | 100 |
| 59.20.1 | Sound-recording studios, etc. | 100 | 100 |
| 59.20.2 | Publishing of sound recordings | 100 | 100 |
| 59.20.3 | Publishing of printed music | 100 | 100 |
| 90.01.2 | Ballet companies, orchestras, bands and choirs | 100 | 100 |
| 90.02 | Support activities to performing arts* | 100 | 100 |
| 90.03.1 | Activities of own-account composers, etc. | 100 | 100 |
| 90.04.1 | Organisation of theatre performances and concerts* | 100 | 100 |
| 90.04.2 | Operation of opera houses, theatre and concert halls, etc.* | 100 | 10 |
| **2. Book market** | | | |
| 18.14 | Binding and related services | 100 | 100 |
| 47.61. | Retail sale of books | 100 | 100 |
| 47.79.2 | Retail sale in second-hand bookstores | 100 | 100 |
| 58.11 | Book publishing | 100 | 100 |
| 74.30.1 | Translation activities | 100 | 100 |
| 90.03.2 | Own-account writers | 100 | 100 |
| **3. Art market** | | | |
| 47.78.3 | Retail sale of art, etc. | 20 | 20 |
| 47.79.1 | Retail sale of antiques, etc. | 100 | 100 |
| 90.03.3 | Own-account visual artists | 100 | 100 |
| 91.02 | Museums activities | 100 | 8 |
| **4. Film industry** | | | |
| 47.63 | Retail sale of music and video recordings, etc.* | 100 | 100 |
| 59.11 | Motion picture, video and TV programme production | 100 | 100 |
| 59.12 | Motion picture, video and TV programme post-production | 100 | 100 |
| 59.13 | Motion picture, video and TV programme distribution | 100 | 100 |
| 59.14 | Motion picture projection activities | 100 | 100 |
| 77.22 | Renting of video tapes and disks | 100 | 100 |
| 90.01.4 | Own-account stage, motion picture, radio and television artists* | 100 | 100 |
| **5. Broadcasting industry** | | | |
| 60.10 | Radio broadcasting | 100 | 40 |
| 60.20 | Television programming and broadcasting | 100 | 40 |
| 90.03.5 | Own-account journalists and press photographers* | 100 | 100 |

Source: Classification of Economic Activities (WZ 2008), Destatis, Arbeitskreis Kulturstatistik e. V., Söndermann 2012;
* economic activity double counts

## Scope of the cultural and creative industries by submarket

| Submarket WZ 2018 | Economic activity | Percentage of companies and turnover | Percentage of employees |
|---|---|---|---|
| **6. Performing arts market** | | | |
| 85.52 | Cultural education | 100 | 100 |
| 90.01.1 | Theatre ensembles | 100 | 10 |
| 90.01.3 | Own-account performers and circus groups | 100 | 100 |
| 90.01.4 | Own-account stage, motion picture, radio and television artists* | 100 | 100 |
| 90.02 | Support activities to performing arts* | 100 | 100 |
| 90.04.1 | Organisation of theatre performances and concerts* | 100 | 100 |
| 90.04.2 | Operation of opera houses, theatre and concert halls, etc.* | 100 | 10 |
| 90.04.3 | Operation of variety theatres and cabarets | 100 | 100 |
| **7. Design industry** | | | |
| 32.12 | Manufacture of jewellery and related articles | 100 | 100 |
| 71.11.2 | Consulting architectural activities in interior design* | 100 | 100 |
| 73.11 | Advertising agencies* | 50 | 50 |
| 74.10.1 | Industrial, product and fashion designers | 100 | 100 |
| 74.10.2 | Graphics and communications designers | 100 | 100 |
| 74.10.3 | Interior decorators | 100 | 100 |
| 74.20.1 | Photographers | 100 | 100 |
| **8. Architecture market** | | | |
| 71.11.1 | Consulting architectural activities in building construction | 100 | 100 |
| 71.11.2 | Consulting architectural activities in interior design* | 100 | 100 |
| 71.11.3 | Consulting architectural activities in town, city and regional planning | 100 | 100 |
| 71.11.4 | Consulting architectural activities in landscape architecture | 100 | 100 |
| 90.03.4 | Own-account restorers | 100 | 100 |
| **9. Press market** | | | |
| 47.62 | Retail sale of magazines, journals and periodicals | 100 | 100 |
| 58.12 | Publishing of directories, etc. | 100 | 100 |
| 58.13 | Publishing of newspapers | 100 | 100 |
| 58.14 | Publishing of journals and periodicals | 100 | 100 |
| 58.19 | Other publishing activities (excluding software) | 100 | 100 |
| 63.91 | News agency activities | 100 | 100 |
| 90.03.5 | Own-account journalists and press photographers* | 100 | 100 |
| **10. Advertising market** | | | |
| 73.11 | Advertising agencies/Advertising design* | 100 | 100 |
| 73.12 | Media representation | 100 | 100 |
| **11. Software/games industry** | | | |
| 58.21 | Publishing of computer games | 100 | 100 |
| 58.29 | Other software publishing | 100 | 100 |
| 62.01.1 | Web-page design and programming | 100 | 100 |
| 62.01.9 | Other software development | 100 | 100 |
| 63.12 | Web portals | 100 | 100 |
| **12. Other** | | | |
| 32.11 | Striking of coins | 100 | 100 |
| 32.13 | Manufacture of imitation jewellery | 100 | 100 |
| 74.20.2 | Photographic laboratories | 100 | 100 |
| 74.30.2 | Interpretation activities | 100 | 100 |
| 91.01 | Libraries and archives | 100 | 8 |
| 91.03 | Operation of historical sites and buildings and similar visitor attractions | 100 | 8 |
| 91.04 | Botanical and zoological gardens and nature reserves | 100 | 8 |

## Parameters and statistical references

### Number of businesses

The figures provided on the number of businesses have been taken from the VAT statistics published by the Federal Statistical Office (Destatis), which since 2009 have been based on the latest Classification of German Economic Activities (WZ 2008). The VAT statistics (based on advance returns) define 'business' as any legally independent entity generating more than €17,500 in turnover per year. This includes all forms of businesses including freelancers who have their own office, all self-employed persons – whether they employ people or not – and all businesses running commercial activities. This means that the term 'business' as it is used here goes beyond its colloquial meaning and is extended to sole proprietorships, one-person companies, micro and small and medium-sized enterprises all the way to large companies. Understanding this range of different types of businesses is of fundamental importance, not least for the cultural and creative industries, where micro and small enterprises account for a significant proportion of economic and employment activities.

### Turnover

Turnover is determined also based on the Federal Statistical Office's VAT statistics. The term 'turnover' as used in the VAT statistics refers to the part of turnover comprising the taxable products and services sold by an entrepreneur, by which is meant all businesses and self-employed persons earning more than €17,500 a year.

As the VAT statistics also provide turnover figures for each economic activity by turnover bracket (eight categories ranging from €17,501 in the lowest bracket to 50 million in the highest), the cultural and creative industries can also be assessed from the angle of size. Using the EU definition of SMEs as a basis, four types of businesses are distinguished. Micro-enterprises (turnover of €2 million or less), small enterprises (turnover of between €2 and €10 million), medium-sized enterprises (turnover of €10 and €50 million) and large enterprises (turnover of more than €50 million). Data privacy rules stipulate that data for individual categories must not be published in cases where these include only a very small number of businesses. As a result of this, some businesses could not be allocated to one of the four business size categories. These usually are, in terms of turnover, medium-sized and large enterprises.

Source: 2019 Cultural and Creative Industries Monitoring Report

## Gross value added

Data on gross value added is published by the Federal Statistical Office in its National Accounts. Data on gross value added is provided for the economic sector level (2-digit numbers) rather than for individual submarkets and can therefore not be used directly for defining the scope of the cultural and creative industries' submarkets and subgroups.

The calculation method uses the gross value added figures from the National Accounts (cf. above). The figures are then weighted based on the breakdown of turnover according to the VAT statistics in order to assign individual value added figures to the various economic activities which form part of the cultural and creative industries. The figures for benchmark sectors, such as mechanical engineering, are also taken from the National Accounts. These figures do not need to be weighted on the basis of the VAT statistics as – in contrast to the cultural and creative industries – these are homogeneous sectors whose gross value added figures are directly available in the National Accounts.

## Workforce

This parameter reflects the cultural and creative industries' contribution to the employment market by giving particular consideration to the fact that many workers in the CCIs are self-employed or one-person companies. The term 'workforce' comprises both self-employed persons and employees. The number of self-employed persons is determined based on the VAT statistics. In the VAT statistics, self-employed persons are defined as generating more than €17,500 in turnover. Entrepreneurs generating €17,500 in turnover or less are considered self-employed persons with mini-jobs.

Persons in marginal (self-)employment include persons in marginal employment and, in deviation from previous studies, self-employed persons with mini-jobs. The category of 'marginally self-employed persons', which is based on the Federal Statistical Office's microcensus, is no longer used.

The Federal Employment Agency's Employment Statistics also cover all economic sectors. They are based on the German Classification of Economic Activities (WZ groups) and provide data down to the level of economic sub-groups (5-digit numbers). The Employment Statistics allow conclusions to be drawn on employees subject to social security contributions and persons in marginal employment.

## Self-employed persons with mini-jobs

For the purpose of this Report, self-employed persons with mini-jobs are considered to be entrepreneurs generating €17,500 in turnover or less.

The number of self-employed persons with mini-jobs is determined based on the VAT statistics that are based on annual VAT returns (VAT assessments). In contrast to the VAT statistics that are based on VAT advance returns, these statistics also include businesses with an annual turnover of €17,500 or less. However, it takes around 3 ¾ years from the end of the reporting period until the results of the VAT statistics become available.

This is why in the present report all figures from 2016 onwards are estimates.

In deviation from previous studies, the data provided on self-employed persons with mini-jobs is based on a special analysis of the Federal Statistical Office's VAT assessment statistics by turnover bracket. This explains deviations between the present and previous studies.

Source: 2019 Cultural and Creative Industries Monitoring Report; Goldmedia, HMS, Prof Wink

## 2019/2020 forecasts

### 2019 forecast and before

The preliminary official results on economic indicators for businesses and the self-employed workforce are based on the VAT statistics and the National Accounts and are available

- up until 2018 for turnover, number of companies, and number of self-employed persons
- up until 2017 for gross value added figures from the National Accounts
- up until 2015 for self-employed persons with mini-jobs

For the extrapolation of data up until 2019, we conducted our own forecast, which is based on previous growth rates.

### Turnover forecast for 2020

A turnover forecast for 2020 was conducted for each submarket of the cultural and creative industries. This forecast is based on the scenarios developed by the Federal Government's Centre of Excellence for the Cultural and Creative Industries in its publication entitled „Betroffenheit der Kultur- und Kreativwirtschaft von der Corona-Pandemie" (Impact of the Covid-19 pandemic on the cultural and creative industries) of 21 April 2020.

It states that "the middle scenario continues to assume that if the industry is severely affected by Covid-19, some submarkets will lose 30% to 40% of their turnover due to a loss of income. If the industry is moderately affected, this will mean turnvoer losses of 20% to 30%, if it is little affected losses of 10% to 20%. These scenarios assume that the severe restrictions imposed on business activities will continue until August and that, following this, the economy will slowly start to recover.

The severe scenario assumes that if the industry is severely affected, this will mean turnvoer losses of 70% to 80%, if it is moderately affected 50%, and if it is little affected 20% to 30%. This scenario expects that the severe restrictions imposed on economic life will continue until the end of the year. This scenario could materialise if there is a new wave infection which results in another lockdown."

Turnover for 2020 was calculated based on the projections (in per cent) provided by the Federal Government's Centre of Excellence for the Cultural and Creative Industries. This was done by extrapolating turnover figures from 2019 using these percentage rates.

Source: Goldmedia, HMS, Prof Wink; Federal Government's Centre of Excellence for the Cultural and Creative Industries Betroffenheit der Kultur- und Kreativwirtschaft von der Corona-Pandemie (Impact of the Covid-19 pandemic on the cultural and creative industries), 21 April 2020

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