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Research Reports

Culture and Creative Industries in Germany 2009
Monitoring of Selected Economic Key Data on Culture and Creative Industries

Monitoring Report 2010 – Summary Version

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Author
Michael Soendermann, Office for Culture Industries Research, Cologne

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1 Introduction

Culture and creative industries have continued to gain importance as an independent economic field during the current year. There are not only activities on the local, regional and national level, but the topic has also attracted growing attention at the European level.

Institutions of the EU Commission are increasingly entering the public discussion. In spring 2010 the *Directorate General Enterprise and Industry* started a new campaign for a "Pan-European Initiative in Support of Innovative Creative Industries in Europe" in the context of its innovation policy. In its *Amsterdam Declaration*[1] of March 2010 it describes the culture and creative industries as a special interface between culture, creativity and innovation, offering a "huge potential to contribute to the transformation of European society, responding to major social, demographical and environmental challenges and leading to a more sustainable and smarter economy within the EU 2020 strategy. Yet, the combined cultural and economic potential of these dynamic industries still remains largely underestimated and untapped." The Directorate General therefore calls for a "European alliance of culture and creative industries." This alliance could counter-balance the fragmentation of the sector by providing a strategic overview of the needs of Europe's creative branch in order to be successful in the global economy.

The Directorate General Education and Culture has issued a *Green Paper on culture and creative industries*[2] to initiate and promote the support to culture and creative industries in a wider European discussion.

In continuation of the German discussion, the *Initiative Culture and Creative Industries of the German Federal Government* (managed by the Federal Ministry of Economics and Technology and the Federal Commissioner for Cultural and Media Affairs) have established a monitoring mechanism for the culture and creative industries to report on current economic key data of the culture and creative industries. The analysis presented here aims in particular at investigating the development potential of the culture and creative industries. The current trends of the difficult year 2009 have also had consequences for the culture and creative industries.

1.1 Definition

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

The economic field of the culture and creative industries comprises of the following eleven core branches or market segments: music industry, book market, art market, film industry, broadcasting industry, performing arts market, design industry, architectural market, press market, advertising market and the software and games industry (for the detailed classification of economic activities see table 6 in the annex).

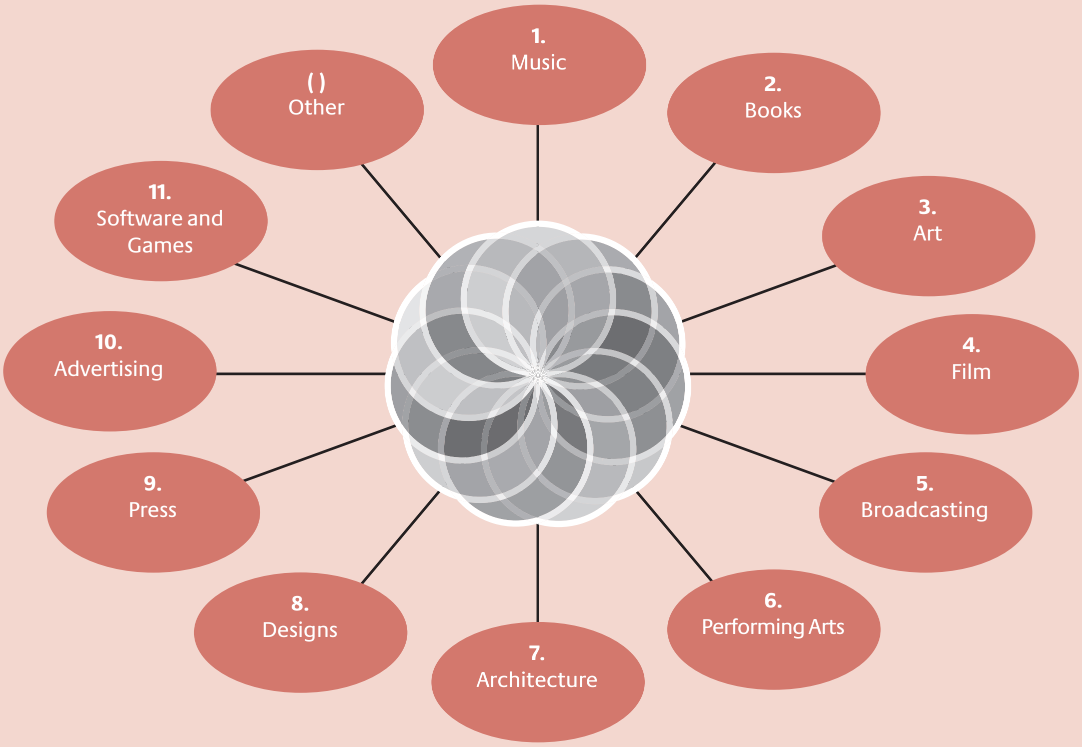
At the core of all cultural and creative activity, there is a creative act ("schöpferischer Akt"). It comprises all the artistic, literary, cultural, musical, architectural or creative content, works, products, productions or services that form the relevant core of the eleven market segments.

The German classification is compatible with the European core classification of the European Commission *(LEG Task Force Cultural Employment*[3]*)* as well as with the British concept of creative industries, which has become a globally accepted reference model.

The category "other" is a field to accommodate and integrate new economic activities into the classification model. German expert circles and the Euro-

1 EU Commission, DG Enterprise and Industry: *The Amsterdam Declaration,* addressed to regional, national and European policy-makers and adopted by the participants of the workshop "Towards a Pan-European initiative in support of creative industries in Europe" organised by the European Commission's Enterprise & Industry Directorate-General in cooperation with the City of Amsterdam, the European Design Centre, the Association of Dutch Designers and IIP Create, March 2010.
2 EU Commission: *Green Paper. Unlocking the potential of cultural and creative industries,* Brussels, COM(2010) 183.
3 Eurostat, Leadership Group (LEG): *Task Force on Cultural Employment.* Luxembourg 2001.

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



Source: Forschungsgutachten Kultur- und Kreativwirtschaft der Bundesregierung 2009 [Research Report Culture and Creative Industries of the German Federal Government 2009]

pean working group ESSnet Culture, Task Force Cultural Industries, for example, discuss the inclusion of a number of economic branches such as the production of musical instruments, arts and crafts and photography.[4]

4 Eurostat, ESSnet Culture: *Task Force Cultural Industries*. Luxembourg 2009.

2
The Perspective of the Culture and Creative Industries

2.1 Economic Overview

Share in Value Added

The share of the culture and creative industries in the overall value added in Germany in 2007 amounts to EUR 63 billion. This corresponds to a share of 2.6% in the gross domestic product. Compared to selected traditional economic branches, e.g. the automobile or the chemical industries, the culture and creative industries occupy a middle range. The automobile industry achieved a gross value added of 77 billion Euro and a share of 3.2% in 2006, the chemical industry EUR 53 billion and a share of 2.2%. The contribution of the ICT industry, which is closely related to the culture and creative industries, is estimated to have a volume of EUR 93 billion and a share in the GDP of 3.8%.

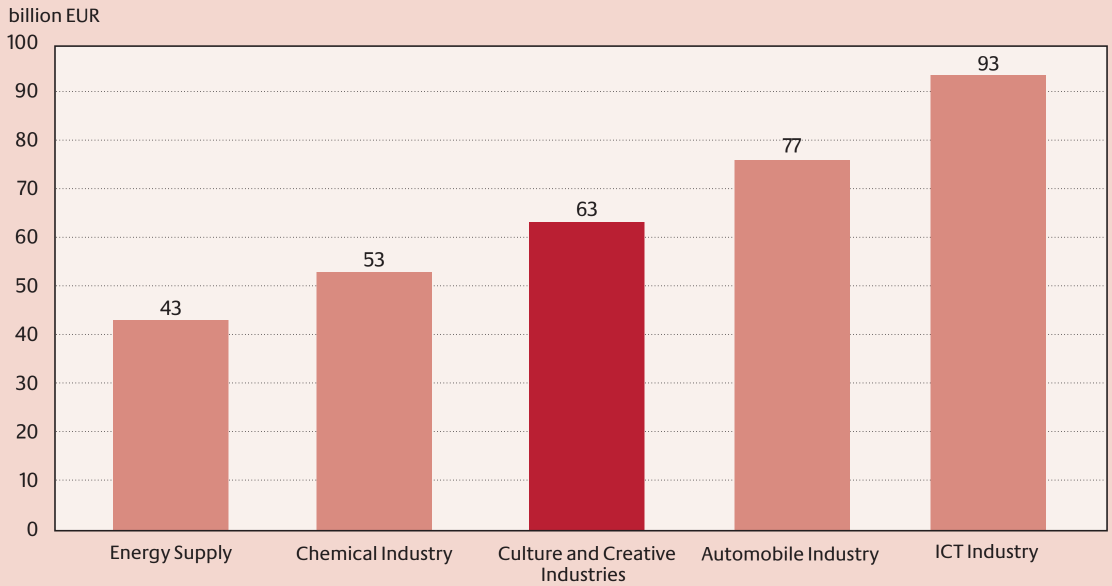
The contribution of the culture and creative industries to the overall creation of value added amounted to a total of EUR 63 million in 2007. According to the overall economic development in the subsequent years 2008 and 2009 the gross value added of the culture and creative industries reaches an all-time high of EUR 65 billion in 2008. Due to the difficult economic development in 2009 the contribution of the culture and creative industries goes down to a total of a little less than EUR 63 billion.

Key Data

The **total number of enterprises** in the culture and creative industries is estimated at **237,000** in 2009. Together they produce a turnover volume of EUR 131.4 billion and provide full-time and part-time jobs for **787,000 employees**. Adding the self-employed persons in the culture and creative industries, the work force amounts to **more than one million**. The total contribution of the culture and creative industries towards gross value added amounts to about EUR 62.6 billion in 2009.

Despite the difficult overall economic situation, the short-term development in the culture and creative industries showed positive growth figures in three of the four categories under investigation (enterprises, turnover, employees liable to social insurance deductions and self-employment).

Figure 2: Contribution of culture and creative industries towards value added, comparison of branches 2007



Note: Estimates for the culture and creative industries are based on national accounting figures, in current prices.

Source: BMWi (Ed.): Culture and Creative Industries Germany 2009, Monitoring Report 2010

Figure 3: The Economic Importance of Culture and Creative Industries – Key Data 2009 (Changes 2009 compared to 2008 in %)

Culture and Creative industries	Total values	Share in overall economy	Change against previous year
Enterprises	237,000	7.4 %	1.7 %
Turnover in billion €	131.4	2.7 %	-3.5 %
Labour force	1,024,000	3.3 %	1.8 %
Employees liable to social security deductions	787,000	2.9 %	1.8 %

Note: All key data are based on preliminary figures and estimates of VAT and employment statistics and national accounting

Source: BMWi (Ed.): Culture and Creative Industries Germany 2009, Monitoring Report 2010

Enterprises and Self-employment

The number of **self-employed persons and enterprises** rose by about 1.7 % in 2009 as compared to 2008. The corporate landscape therefore continued its positive development, although the significantly higher growth rates of the previous years could not be reached again (2007: 2.9 %, 2008: 3.1 %). Notwithstanding the slower pace of growth, the share of culture and creative industries enterprises in the overall economy continued to increase, because the overall corporate landscape in Germany grew by only about 1 % annually over the last three years.

The relative importance of the culture and creative industries has therefore further increased; the share of enterprises in the overall economy amounts to 7.4 % in 2009.

Turnover

The **economic development** of the culture and creative industries showed a nominal decrease in turnovers for the first time. The turnover volume decreased by 3.5 % in 2009 as compared to the previous year. This means that the growth rates of 4.4 % and 2.3 % could not be achieved again. On the backdrop of the economic crisis in 2009, a weaker development in the culture and creative industries was only to be expected. To a certain degree, this clear negative growth comes as a surprise as other markers such as the labour market development in the culture and creative industries have shown positive trends even in the crisis year of 2009. Despite turnover losses of 3.5 % in 2009, the culture and creative industries have survived the economic crisis remarkably well so far. Turnovers in the overall economy, for comparisons, showed a minus of 8 %, which is twice as much (estimate based on national accounting figures of the German Federal Statistical Office[5], which has established a minus of 8.5 % for the overall production of all economic sectors).

This clear overall loss in turnovers is mainly caused by the productive sector where two-digit negative growth rates were registered in important key industries such as the automobile industry, the manufacture of machinery and the chemical industry. The service sector, which the culture and creative industries are part of, mainly registered only one-digit loss rates in the years under review. According to preliminary estimates by the German Federal Statistical Office, some branches such as the telecom industries even managed an increase of 1.2 % in turnovers during the crisis year 2009.

The significantly weaker economic development of the overall economy led to a growing relative importance of the culture and creative industries. Turnovers produced in the culture and creative industries had a share of 2.7 % in the overall economy in 2009; the comparative figures of

5 Destatis: *Volkswirtschaftliche Gesamtrechnungen 2009. Inlandsproduktsberechnung, detaillierte Jahresergebnisse.* [National accounting 2009. Calculation of domestic product, detailed annual data]. Fachserie 18, Reihe 1.4, Wiesbaden (Stand Mai 2010).

the two previous years amounted to 2.5 and 2.6 % respectively.

Employees

Considering the economic situation, the **labour market** shows a surprisingly positive trend. In spite of the crisis in 2009, the number of employees grew by 1.8 % as compared to 2008. Although this did not reach the growth rates of 2007 and 2008, which had brought a significant increase for the culture and creative industries at 3 % to almost 4 %, it remains a remarkable phenomenon that the culture industries could keep and even expand their employment potential despite the economic crisis.

The slightly positive development in the labour market is certainly also caused by the continuing increase in the number of enterprises or one-person-businesses, who create their own jobs as individual entrepreneurs. However, it is mainly caused by the slight increase in the number of employees. In continuation of a trend already visible in previous years, small and medium enterprises rely more and more on permanent staff and continue creating jobs that are liable to social insurance deductions.

The overall trend shows that the labour market situation in the culture and creative industries has grown by 1.8 % between 2008 and 2009, again showing a stronger positive trend than the overall economy. Here the labour market stagnated during the same period, showing a negative growth rate of 0.2 %. The share of employees in the culture and creative industries thus amounts to 3.3 % of overall employment in 2009. The share of employees (employees liable to social insurance deductions only) in overall employment in Germany amounts to 2.9 %.

2.2 The Culture and Creative Industries in Comparison to Selected Industries in 2009

Culture Industries and Selected Industrial Branches

Central key data for the current development of the culture and creative industries in 2008 and 2009 refer to the change rate in employment, which increased by 1.8 %, and to the economic development measured in terms of a turnover rate that took a negative trend of minus 3.5 %.

A comparison to the corresponding key data of traditional industrial branches shows that the culture and creative industries have fared rather well in the economic crisis. Three of the four branches selected for comparison automobile industry, manufacture of machinery and chemical industry showed negative growth rates of 1 % to 3.5 % in their respective labour markets; only the food industry showed a different trend as it increased by 1.3 %.

Key data for the turnover development in the manufacturing sector[6] show much more alarming trends. National statistics registered change rates of minus 18 to minus 23 % in the automobile industry, the manufacture of machinery and the chemical industry. Turnovers in the food industry decreased by 6 % during this crisis year. The overall loss of turnover in the manufacturing sector in the crisis year 2009 amounted to minus 18 %.

However, it must be borne in mind that even the service sector has most probably not survived the crisis year 2009 without taking damage. The statistics of the German Federal Statistical Office[7] indicate that key data for important parts of the service sector are also negative. Between 2008 and 2009 the labour market shrank by 1.2 %, and turnovers decreased by 7.2 %. The branches selected here include traffic, information and communication and company-related services.

6 Destatis: *Jahresbericht für Betriebe 2009. Betriebe von Unternehmen des Verarbeitenden Gewerbes sowie des Bergbaus und der Gewinnung von Steinen und Erden mit 20 und mehr tätigen Personen.* [Annual report on enterprises 2009. Enterprises in the manufacturing sector, mining and the extraction of rocks, stones and non-metallic minerals with 20 and more employees]. Wiesbaden 2010.

7 Destatis: *Dienstleistungen. Konjunkturstatistische Erhebung in bestimmten Dienstleistungsbereichen. Umsatz- und Beschäftigungsindizes 1. Vierteljahr 2010.* Services. [Survey on economic statistics in selected service areas. Turnover and employment indices 1st quarter]. Fachserie 9, Reihe 3, Wiesbaden 2010.

Figure 4: Culture and Creative Industries in Comparison to Selected Branches of the Manufacturing Sector in the Crisis Year 2009 (Changes 2009 compared to 2008 in %)

	Employment	Turnover
Manufacturing Sector Total	-4.5 %	-18 %
Automobile Industry	-5.2 %	-23 %
Manufacture of Machinery	-5.1 %	-20 %
Chemical Industry	-1.0 %	-18 %
Food Industry	1.3 %	-6 %
Culture and Creative Industry	1.8 %	-3,5 %

Note: Key data are based on preliminary figures and estimates for the culture and creative industries of the turnover and employment statistics; key data on the manufacturing sector are based on the annual report for companies 2009, Destatis 2010.

Source: BMWi (Ed.): Culture and Creative Industries Germany 2009, Monitoring Report 2010

The reasons for the somewhat "milder" course the crisis took in the service sectors are not easily identified. As company-related services depend on the production sector, the negative effect is logical. The factors leading to a less dramatic development in the service sectors may have included the stability of private consumer expenses (change of 0.1% between 2008 and 2009) and the positive development of state consumer expenses (change of 4.8% between 2008 and 2009).

The same economic drivers can be observed in the market segments of the culture and creative industries as well. While industrial design suffered economic losses in the crisis year due to its connection to the production sector, the segment product, fashion, and graphic design remained economically stable, because here the demand is mainly determined by private consumers.

The experience of the crisis year 2009 shows that the production sectors is still of paramount importance for the overall economic development. However, it also shows the stabilizing effect the service sector can have for the economic situation and for employment – and the culture and creative industries certainly make a significant contribution to this effect.

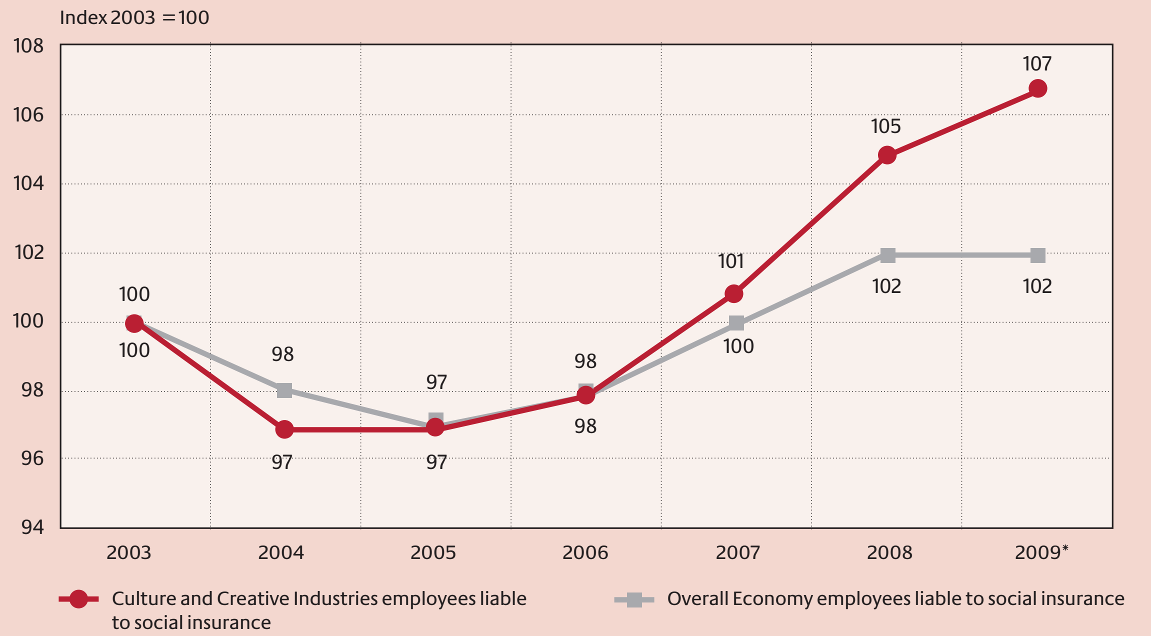
2.3 Unexpected Findings in Culture and Creative Industries

Dependent employment shows significant positive trend

Following the last economic low of the culture and creative industries in 2003, turnover volumes as well as the numbers of enterprises and self-employed persons had been rising steadily. The culture and creative industries developed into a sector characterised by freelance professionals and micro-enterprises with just one job place. The number of dependent employees was decreasing as shown in the graph below. Between 2003 and 2006 the development of employment remained negative. This trend was much more significant in the culture and creative industries than in the overall economy.

The graph shows a significant upward trend for the culture and creative industries starting from 2006. Until 2009, the number of employees has risen by another 7% compared to the base year 2003. The more vigorous growth dynamic as compared to the overall economy is especially noticeable, although even here we see an increase since the middle of the decade. However, in 2009 the growth of the overall economy is stagnant, while the culture and creative industries continue to grow. This finding is all the more significant as we are looking at jobs liable to social insurance deductions and not at marginally employed or self-employed persons.

Figure 5: Development of dependent employment in the culture and creative industries compared to the overall economy, 2003 – 2009



Note: The key data are based on preliminary labour statistics of the Federal Agency for Employment 2010.
* Estimates or preliminary data

Source: BMWi (Ed.): Culture and Creative Industries Germany 2009, Monitoring Report 2010

Should this trend in job places liable to social insurance deductions persist, this would be a surprising observation for the culture and creative industries. Up until now, a long-term trend towards more self-employed and independent professionals has been assumed as a basis assumption for the structural change in this heterogeneous complex of branches. Should the number of employees liable to social insurance deductions further consolidate, this may be an indicator for a more stable enterprise structure developing in the culture and creative industries.

Growth Drivers in 2008

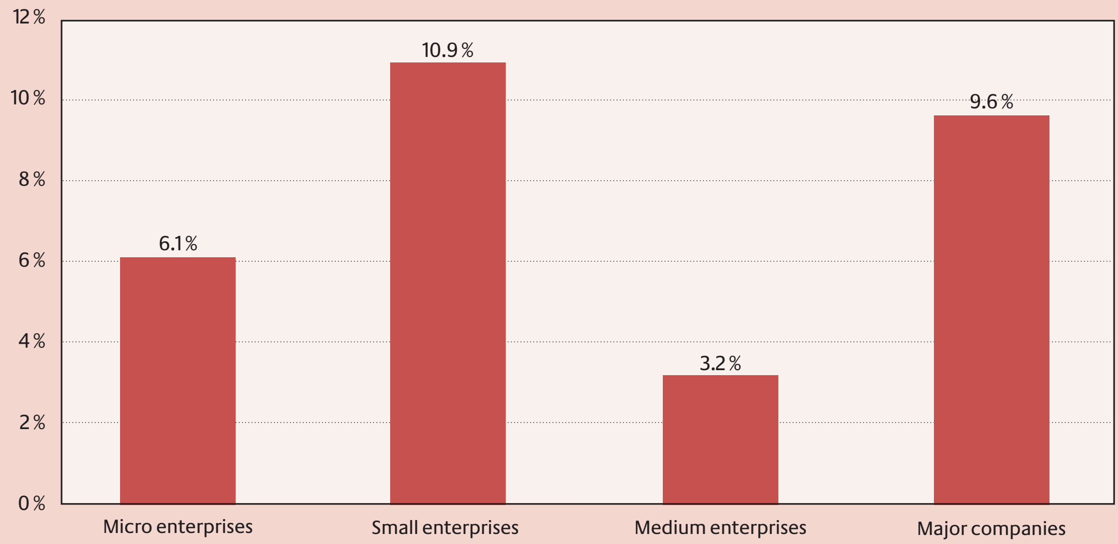
When analysing the culture and creative industries, detailed knowledge of the different types of enterprises is of far greater importance than in the analysis of other economic branches. While in traditional industrial branches such as the automobile industry 97% of the entire turnover are produced by a few major companies, there is not such focus in the culture and creative industries. In 2008, for example, 27% of the entire turnover was produced by micro enterprises and self-employed persons. Small enterprises contributed 17% to the overall turnover. The “small ones” added together produced a greater share in the turnover than the major companies, whose share amounted to 41%. Medium-size enterprises achieved a share of 16% in 2008.

The distribution of turnover shows how important it is to analyse the different types of enterprises in the culture and creative industries. Different from other branches, it does not make sense here to concentrate on the few majors in the market and improve their conditions.

However, it does not make sense either to consider only the special role of the micro enterprises. Small enterprises (excluding micro enterprises) were the most important drivers of economic development in the period 2006 to 2008. Their turnover grew by almost 11 % during that period. They were followed by the major companies whose turnovers increased by almost 10 %. Micro enterprises and medium enterprises had growth rates of 6 % and 3 % respectively and ranged behind the other two.

This special analysis of the 2008 turnover tax statistics of the German Federal Statistical Office by turnover volume ranges show that the focus on the small enterprises in the culture and creative industries is as inadequate as concentrating on just the majors in the specific branches. The specific economics of the culture and creative industries – or its inner segmentation – is a structural pattern which has to be analysed in order to understand the development of this complex of branches.

Figure 6: Small and major enterprises, the growth drivers in the culture and creative industries, 2008 (change in 2008 vs. 2006 in %)



Note: Figures are based on the turnover tax statistics of the German Federal Statistical Office 2010.

Source: BMWi (Ed.): Culture and Creative Industries Germany 2009, Monitoring Report 2010

3
Annexes

Table 1: Key Data on Culture and Creative Industries Germany, 2007 – 2009

Category	2007	2008	2009*	Change in % 2007/06	2008/07	2009/08
Number of Enterprises (1)						
Culture and creative industries (CCI)	225,738	232,770	236,837	2.9%	3.1%	1.7%
Share of CCI in overall economy	7.2%	7.3%	7.4%	-	-	-
Turnover in million €						
Culture and creative industries (CCI)	133,187	136,202	131,407	4.4%	2.3%	-3.5%
Culture and creative industries (CCI)	2.6%	2.5%	2.7%	-	-	-
No of employees (liable to social insurance deductions) (2)						
Culture and creative industries (CCI)	743,056	772,762	786,699	3.2%	4.0%	1.8%
Share of CCI in overall economy	2.8%	2.8%	2.9%	-	-	-
Number of persons employed (3)						
Culture and creative industries (CCI)	968,794	1,005,532	1,023,535	3.1%	3.8%	1.8%
	3.2%	3.3%	3.3%	-	-	-
Gross value added in billion € (5)						
Culture and creative industries (CCI)	63.1	64.9	62.6	4.0%	2.8%	-3.5%
Share of CCI in GDP	2.6%	2.6%	2.6%	-	-	-
Gross Domestic Product (GDP)	2,428.2	2,495.8	2,409.1	4.4%	2.8%	-3.5%
Key data for culture and creative industries						
Turnover per enterprise in thousand €	590	585	555	1.5%	-0.8%	-5.2%
Turnover per employee in thousand €	179	176	167	1.2%	-1.7%	-5.2%
Turnover per person employed in thousand €	137	135	128	1.2%	-1.5%	-5.2%
Employees per enterprise	3.3	3.3	3.3	0.3%	0.9%	0.1%
Persons employed per enterprise	4.3	4.3	4.3	0.2%	0.7%	0.0%
%-share of self-employed persons in overall labour force	23.3	23.1	23.1	-0.2%	-0.7%	0.0%
Gross value added per person employed in thousand €	65.1	64.5	61.2	0.8%	-1.0%	-5.2%

Note: * Enterprises and turnovers 2009 estimated; employees liable to social insurance deductions and persons employed in 2009 preliminary figures by the German Federal Agency for Employment. (1) Taxable entrepreneurs/enterprises with annual turnovers of EUR 17,500 or more. (2) Employees liable to social insurance deductions in full and part time jobs, but excluding marginal employment and side jobs. (3) Persons employed include taxable enterprises and employees liable to social insurance deductions. According to the available statistical data, there are at least 280,000 marginally employed persons in the CCI in 2009. (4) Only taxable persons starting from EUR 17,500 and employees liable to social insurance deductions, but excluding marginally employed persons. (5) Estimates of gross value added 2007 based on national accounting (VGR, May 2010); continuation of gross value added in 2008 and 2009 on the basis of the respective change rates in the GDP for those years.

Sources: Turnover tax statistics, Destatis 2010; labour market statistics Federal Agency for Employment 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 2: Culture and Creative Industries 2003 to 2009 according to eleven market segments

Market segment	Category	2003	2004	2005	2006	2007	2008	2009*
Music industry	Enterprise	10,017	10,245	10,569	10,798	10,882	11,019	11,104
Book market	Enterprise	12,715	13,063	13,427	13,638	13,817	13,906	13,999
Art market	Enterprise	10,285	10,381	10,692	10,985	11,362	12,003	12,250
Film industry	Enterprise	15,741	16,258	17,032	17,654	18,234	18,982	19,344
Broadcasting industry	Enterprise	13,956	14,964	16,081	17,504	18,519	19,133	19,691
Performing arts market	Enterprise	14,392	15,288	16,333	17,320	18,047	18,770	19,217
Design industry	Enterprise	32,893	35,029	37,119	38,728	40,032	41,341	42,101
Architectural market	Enterprise	36,789	37,233	38,078	39,737	40,154	40,624	41,073
Press market	Enterprise	19,432	20,478	21,559	22,917	23,824	24,506	25,073
Advertising	Enterprise	37,220	38,191	39,037	39,507	40,041	40,827	41,144
Software/games industry	Enterprise	27,633	30,783	33,405	35,719	37,959	40,503	41,847
Culture and creative industries	Enterprise	193,967	202,049	210,832	219,376	225,738	232,770	236,837
Overall economy	Enterprise	2,915,482	2,957,173	3,036,758	3,099,493	3,140,509	3,186,878	3,212,714
Music industry	Turnover in million €	4,930	5,025	5,391	5,392	5,282	5,596	5,538
Book market	Turnover in million €	14,010	13,605	14,133	14,743	14,623	14,446	14,766
Art market	Turnover in million €	1,490	1,536	1,614	1,767	1,798	1,946	1,840
Film industry	Turnover in million €	7,869	7,576	7,625	7,609	7,044	7,283	7,150
Broadcasting industry	Turnover in million €	8,597	8,898	9,290	9,797	10,232	10,085	9,277
Performing arts market	Turnover in million €	3,192	3,350	3,769	4,154	4,360	4,548	4,481
Design industry	Turnover in million €	10,855	11,563	13,316	14,869	15,807	15,981	15,218
Architectural market	Turnover in million €	7,058	6,734	6,934	7,287	7,532	8,002	8,002
Press market	Turnover in million €	27,882	27,930	27,792	27,312	27,916	28,065	27,160
Advertising	Turnover in million €	22,839	23,347	24,025	25,797	27,214	27,188	25,557
Software/games industry	Turnover in million €	19,288	21,485	23,028	24,103	27,465	29,545	28,067
Culture and creative industries	Turnover in million €	117,047	119,314	123,344	127,552	133,187	136,202	131,407
Overall economy	Turnover in million €	4,248,074	4,347,506	4,567,397	4,930,000	5,148,265	5,412,240	4,952,200
Music industry	Persons employed	34,968	34,371	34,652	34,984	35,580	36,081	36,342
Book market	Persons employed	86,341	83,147	82,018	81,497	78,563	78,351	74,607
Art market	Persons employed	14,617	14,719	14,953	15,249	15,621	16,303	16,570
Film industry	Persons employed	54,766	54,954	55,529	53,850	55,584	57,608	57,927
Broadcasting industry	Persons employed	36,705	38,238	40,353	41,521	43,803	44,702	46,413

Market segment	Category	2003	2004	2005	2006	2007	2008	2009*
Performing arts market	Persons employed	32,943	33,447	36,205	36,899	38,211	39,780	41,256
Design industry	Persons employed	116,896	114,805	117,089	120,147	125,280	132,480	129,827
Architectural market	Persons employed	109,927	104,673	100,985	99,626	99,700	103,330	103,921
Press market	Persons employed	131,558	128,028	124,683	124,360	126,418	126,733	126,475
Advertising	Persons employed	145,779	140,770	139,937	142,021	146,045	152,834	149,216
Software/games industry	Persons employed	278,644	277,029	291,306	305,805	326,362	346,923	367,913
Culture and creative industries	Persons employed	931,435	914,362	923,883	939,257	968,794	1,005,532	1,023,546
Overall economy	Persons employed	29,870,168	29,481,155	29,215,024	29,453,829	29,995,075	30,644,593	30,592,810
Music industry	empl. with social insurance deductions	24,951	24,126	24,083	24,186	24,698	25,062	25,238
Book market	empl. with social insurance deductions	73,626	70,084	68,591	67,859	64,746	64,445	60,609
Art market	empl. with social insurance deductions	4,332	4,337	4,262	4,264	4,259	4,300	4,320
Film industry	empl. with social insurance deductions	39,025	38,696	38,497	36,196	37,350	38,626	38,583
Broadcasting industry	empl. with social insurance deductions	22,749	23,274	24,272	24,017	25,284	25,569	26,722
Performing arts market	empl. with social insurance deductions	18,551	18,159	19,872	19,579	20,164	21,010	22,038
Design industry	empl. with social insurance deductions	84,003	79,776	79,970	81,419	85,248	91,139	87,726
Architectural market	empl. with social insurance deductions	73,138	67,440	62,907	59,889	59,546	62,706	62,848
Press market	empl. with social insurance deductions	112,126	107,550	103,124	101,443	102,594	102,227	101,392
Advertising	empl. with social insurance deductions	108,559	102,579	100,900	102,514	106,004	112,007	108,072
Software/games industry	empl. with social insurance deductions	251,011	246,246	257,901	270,086	288,403	306,420	326,066
Culture and creative industries	empl. with social insurance deductions	737,468	712,313	713,052	719,880	743,056	772,762	786,699
Overall economy	empl. with social insurance deductions	26,954,686	26,523,982	26,178,266	26,354,336	26,854,566	27,457,715	27,380,096

Note: (*) Estimate or preliminary figure, see notes in table 1.

Sources: Turnover tax statistics, Destatis 2010; Labour market statistics, Federal Agency for Employment 2010; calculated by Michael Soendermann/Office for Culture Industries Research

Table 3.1: Culture and Creative Industries in Germany
Enterprises according to economic branches, 2003 to 2009

WZ-2003	Economic branch	Enterprises						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
1. Music Industry								
92.31.5	Own-account musicians, composers	2,148	2,213	2,303	2,337	2,392	2,461	2,489
92.31.2	Music and dance ensembles	1,957	1,909	1,897	1,859	1,817	1,792	1,775
22.14.0	Publishing of recorded music, music publishing	1,302	1,370	1,401	1,478	1,494	1,536	1,560
92.32.1	*Theatre/concert organisers	1,088	1,151	1,200	1,268	1,290	1,305	1,324
92.32.2	*Operation of opera houses, theatre and concert halls and similar facilities	204	200	204	207	216	260	271
92.32.5	*Technical activities in support of cultural and entertaining services	954	1,060	1,210	1,358	1,404	1,411	1,448
52.45.3	Retail sale of musical instruments and scores	2,364	2,342	2,354	2,291	2,269	2,254	2,238
	Market segment total	**10,017**	**10,245**	**10,569**	**10,798**	**10,882**	**11,019**	**11,104**
2. Book Market								
92.31.6	Own-account writers	5,035	5,336	5,654	5,915	6,118	6,422	6,561
22.11.1	Book publishing	2,553	2,606	2,650	2,674	2,671	2,623	2,619
52.47.2	Retail sale of books	5,127	5,121	5,123	5,049	5,028	4,861	4,819
	Market segment total	**12,715**	**13,063**	**13,427**	**13,638**	**13,817**	**13,906**	**13,999**
3. Art Market								
92.31.3	Own-account artists	7,265	7,380	7,713	8,039	8,485	9,106	9,365
52.48.2***	Retail sale of art (estimate)	2,191	2,132	2,077	2,003	1,941	1,928	1,904
92.52.1	Museum shops and art exhibitions	829	869	902	943	936	969	981
	Market segment total	**10,285**	**10,381**	**10,692**	**10,985**	**11,362**	**12,003**	**12,250**
4. Film Industry								
92.31.7	*Own-account stage artists	7,607	8,033	8,519	8,924	9,377	9,805	10,040
92.11.0	Motion picture and video productions	5,806	6,002	6,330	6,600	6,830	7,211	7,371
92.12.0	Motion picture and video distribution	1,321	1,233	1,196	1,145	1,067	1,022	996
92.13.0	Cinemas	1,007	990	987	985	960	944	937
	Market segment total	**15,741**	**16,258**	**17,032**	**17,654**	**18,234**	**18,982**	**19,344**

WZ-2003	Economic branch	Enterprises						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
5. Broadcasting industry								
92.40.2	*Own-account journalists	13,130	14,125	15,223	16,615	17,594	18,199	18,757
92.20.0	Radio and television activities	826	839	858	889	925	934	934
	Market segment total	**13,956**	**14,964**	**16,081**	**17,504**	**18,519**	**19,133**	**19,691**
6. Performing Arts Market								
92.31.7	*Own-account stage artists	7,607	8,033	8,519	8,924	9,377	9,805	10,040
92.31.8	Own-account performers	479	483	496	531	534	538	545
92.31.1	Theatre ensembles	87	95	102	108	112	115	117
92.32.1	*Theatre/concert organisers	1,088	1,151	1,200	1,268	1,290	1,305	1,324
92.32.2	*Operation of opera houses, theatre and concert halls and similar facilities	204	200	204	207	216	260	271
92.32.3	Variety theatres and cabarets	198	194	200	203	214	212	214
92.32.5	*Technical activities in support of cultural and entertaining	954	1,060	1,210	1,358	1,404	1,411	1,448
92.34.1	Dancing school/from 2009 cultural lessons	1,381	1,441	1,466	1,522	1,568	1,618	1,645
92.34.2	Other entertainment activities (circus, acrobats, puppet theatres)	2,394	2,631	2,936	3,199	3,332	3,506	3,613
	Market segment total	**14,392**	**15,288**	**16,333**	**17,320**	**18,047**	**18,770**	**19,217**
7. Design Industry								
74.20.6	Industrial design	2,598	2,841	3,116	3,455	3,820	3,768	3,891
74.87.4	Product-/fashion-/graphic design	11,306	11,974	12,855	13,445	13,804	14,544	14,849
74.40.1	*Communication design/advertising design	18,989	20,214	21,148	21,828	22,408	23,029	23,361
	Market segment total	**32,893**	**35,029**	**37,119**	**38,728**	**40,032**	**41,341**	**42,101**
8. Architectural Market								
74.20.1	Consulting architectural activities in building construction and interior design	31,890	32,191	32,841	34,124	34,308	34,542	34,835
74.20.2	Consulting architectural activities in town, city and regional planning	2,683	2,786	2,913	3,132	3,252	3,398	3,487
74.20.3	Consulting architectural activities in landscape architecture	2,216	2,256	2,324	2,481	2,594	2,684	2,750
	Market segment total	**36,789**	**37,233**	**38,078**	**39,737**	**40,154**	**40,624**	**41,073**

WZ-2003	Economic branch	Enterprises						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
9. Press market								
92.40.2	*Own-account journalists	13,130	14,125	15,223	16,615	17,594	18,199	18,757
92.40.1	News agencies	801	785	823	801	753	789	783
22.11.2	Publishing of directories	157	165	162	169	165	164	164
22.12.0	Newspaper publishing	688	711	702	700	698	741	748
22.13.0	Publishing of journals and periodicals	1,784	1,790	1,744	1,732	1,696	1,713	1,708
22.15.0	Other publishing	2,872	2,902	2,905	2,900	2,918	2,900	2,912
	Market segment total	**19,432**	**20,478**	**21,559**	**22,917**	**23,824**	**24,506**	**25,073**
10. Advertising Market								
74.40.1	* Activities of advertising consultants, window dressing	18,989	20,214	21,148	21,828	22,408	23,029	23,361
74.40.2	Dissemination of advertising media and activities of advertising agencies	18,231	17,977	17,889	17,679	17,633	17,798	17,783
	Market segment total	**37,220**	**38,191**	**39,037**	**39,507**	**40,041**	**40,827**	**41,144**
11. Software-/Games Industry								
72.20.1	Software publishing	571	593	615	641	704	706	723
72.20.2	Software consultancy and development	27,062	30,190	32,790	35,078	37,255	39,797	41,124
	Market segment total	**27,633**	**30,783**	**33,405**	**35,719**	**37,959**	**40,503**	**41,847**
12. Other Activities								
92.31.4	Own-account restorers	1,070	1,115	1,209	1,266	1,288	1,304	1,321
92.51.0	Libraries/archives	66	70	69	74	90	92	97
92.52.2	Operation of historical sites and building	63	51	60	65	79	83	88
92.53.0	Botanical and zoological gardens and nature reserves	229	252	278	300	325	313	319
92.33.0	Fairs and amusement parks	3,438	3,431	3,388	3,364	3,374	3,373	3,371
	Market segment total	**4,866**	**4,919**	**5,004**	**5,069**	**5,156**	**5,165**	**5,195**
	Double countings	**235,939**	**246,832**	**258,336**	**269,576**	**278,027**	**286,779**	**292,037**
	Double WZ	41,972	44,783	47,504	50,200	52,289	54,009	55,201
Culture and Creative Industries nos. 1–12		**193,967**	**202,049**	**210,832**	**219,376**	**225,738**	**232,770**	**236,837**
Share in Overall Economy		**6.7%**	**6.8%**	**6.9%**	**7.1%**	**7.2%**	**7.3%**	**7.4%**

Note: * Economic branch included in several market segments; ** Estimates or preliminary figures; ***Estimates for the entire economic branch; journalists also in broadcasting industry (change of definition in 2009); dancing schools expanded to cultural education from 2009; differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 3.2: Culture and Creative Industries in Germany
Turnovers by Economic Branches 2003 to 2009

WZ-2003	Economic Branch	Turnover						
		in mill. € 2003	in mill. € 2004	in mill. € 2005	in mill. € 2006	in mill. € 2007	in mill. € 2008	in mill. € 2009**
1. Music Industry								
92.31.5	Own-account musicians, composers	241	235	238	244	236	244	244
92.31.2	Music and dance ensembles	201	222	215	214	216	241	241
22.14.0	Publishing of recorded music, music publishing	2,001	2,002	2,083	1,867	1,762	1,806	1,754
92.32.1	*Theatre/concert organisers	963	1,011	1,196	1,301	1,325	1,420	1,370
92.32.2	*Operation of opera houses, theatre and concert halls and similar facilities	329	303	343	334	333	383	387
92.32.5	*Technical activities in support of cultural and entertaining services	225	285	302	381	406	457	479
52.45.3	Retail sale of musical instruments and scores	969	967	1,015	1,051	1,004	1,044	1,063
	Market segment total	**4,930**	**5,025**	**5,391**	**5,392**	**5,282**	**5,596**	**5,538**
2. Book Market								
92.31.6	*Own-account writers	384	409	446	456	481	505	505
22.11.1	Book publishing	9,697	9,228	9,639	10,294	10,213	9,980	10,359
52.47.2	Retail sale of books	3,929	3,968	4,048	3,993	3,929	3,962	3,903
	Market segment total	**14,010**	**13,605**	**14,133**	**14,743**	**14,623**	**14,446**	**14,766**
3. Art Market								
92.31.3	*Own-account artists	607	623	665	713	768	898	898
52.48.2***	Retail sale of art (estimate)	583	590	608	588	589	600	492
92.52.1	Museum shops and art exhibitions	300	324	341	466	440	448	451
	Market segment total	**1,490**	**1,536**	**1,614**	**1,767**	**1,798**	**1,946**	**1,840**
4. Film Industry								
92.31.7	* Own-account stage artists	646	678	714	754	807	847	847
92.11.0	Motion picture and video productions	4,291	3,964	4,083	3,788	3,534	3,668	3,441
92.12.0	Motion picture and video distribution	1,428	1,317	1,465	1,621	1,372	1,451	1,361
92.13.0	Cinemas	1,504	1,616	1,363	1,446	1,331	1,316	1,501
	Market segment total	**7,869**	**7,576**	**7,625**	**7,609**	**7,044**	**7,283**	**7,150**
5. Broadcasting								
92.40.2	*Own-account journalists	941	1,018	1,066	1,197	1,255	1,307	1,307

WZ-2003	Economic Branch	Turnover						
		in mill. € 2003	in mill. € 2004	in mill. € 2005	in mill. € 2006	in mill. € 2007	in mill. € 2008	in mill. € 2009**
92.20.0	Radio and television activities	7,656	7,880	8,225	8,600	8,976	8,778	7,971
	Market segment total	**8,597**	**8,898**	**9,290**	**9,797**	**10,232**	**10,085**	**9,277**
6. Performing Arts Market								
92.31.7	*Own-account stage artists	646	678	714	754	807	847	847
92.31.8	Own-account performers	36	35	34	36	37	38	38
92.31.1	Theatre ensembles	36	38	37	41	50	50	50
92.32.1	*Theatre/concert organisers	963	1,011	1,196	1,301	1,325	1,420	1,370
92.32.2	* Operation of opera houses, theatre and concert halls and similar facilities	329	303	343	334	333	383	387
92.32.3	Variety theatres and cabarets	89	74	72	74	88	83	78
92.32.5	* Technical activities in support of cultural and entertaining	225	285	302	381	406	457	479
92.34.1	Dancing school/from 2009 cultural lessons	166	173	183	198	205	209	219
92.34.2	Other entertainment activities (circus, acrobats, puppet theatres)	703	752	887	1,036	1,111	1,060	1,012
	Market segment total	**3,192**	**3,350**	**3,769**	**4,154**	**4,360**	**4,548**	**4,481**
7. Design Industry								
74.20.6	Industrial design	437	484	538	680	793	761	730
74.87.4	Product-/fashion-/graphic design	1,406	1,503	1,590	1,595	1,659	1,732	1,808
74.40.1	*Communication design/advertising design	9,012	9,576	11,188	12,594	13,355	13,489	12,679
	Market segment total	**10,855**	**11,563**	**13,316**	**14,869**	**15,807**	**15,981**	**15,218**
8. Architectural Market								
74.20.1	Consulting architectural activities in building construction and interior design	6,013	5,839	6,003	6,246	6,404	6,736	6,736
74.20.2	Consulting architectural activities in town, city and regional planning	660	525	544	626	699	762	762
74.20.3	Consulting architectural activities in landscape architecture	385	370	387	414	429	504	504
	Market segment total	**7,058**	**6,734**	**6,934**	**7,287**	**7,532**	**8,002**	**8,002**
9. Press Market								
92.40.2	*Own-account journalists	941	1,018	1,066	1,197	1,255	1,307	1,307
92.40.1	News agencies	925	790	813	804	882	759	751
22.11.2	Publishing of directories	1,107	1,074	1,068	1,102	1,113	1,232	1,262

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WZ-2003	Economic Branch	Turnover						
		in mill. € 2003	in mill. € 2004	in mill. € 2005	in mill. € 2006	in mill. € 2007	in mill. € 2008	in mill. € 2009**
22.12.0	Newspaper publishing	8,505	8,634	10,833	10,617	10,896	8,873	8,465
22.13.0	Publishing of journals and periodicals	12,785	12,652	10,651	10,172	10,165	12,271	11,707
22.15.0	Other publishing	3,618	3,762	3,362	3,419	3,605	3,623	3,669
	Market segment total	**27,882**	**27,930**	**27,792**	**27,312**	**27,916**	**28,065**	**27,160**
10. Advertising Market								
74.40.1	* Activities of advertising consultants, window dressing	9,012	9,576	11,188	12,594	13,355	13,489	12,679
74.40.2	Dissemination of advertising media and activities of advertising agencies	13,828	13,771	12,838	13,203	13,859	13,699	12,877
	Market segment total	**22,839**	**23,347**	**24,025**	**25,797**	**27,214**	**27,188**	**25,557**
11. Software-/Games Industry								
72.20.1	Software publishing	476	732	834	751	901	988	938
72.20.2	Software consultancy and development	18,812	20,753	22,194	23,352	26,564	28,557	27,129
	Market segment total	**19,288**	**21,485**	**23,028**	**24,103**	**27,465**	**29,545**	**28,067**
12. Other Activities								
92.31.4	Own-account restorers	106	106	118	136	133	133	133
92.51.0	Libraries/archives	22	18	19	20	23	29	28
92.52.2	Operation of historical sites and building	26	17	20	24	27	27	27
92.53.0	Botanical and zoological gardens and nature reserves	173	183	220	209	261	267	269
92.33.0	Fairs and amusement parks	827	814	858	894	952	964	964
	Market segment total	**1,154**	**1,138**	**1,234**	**1,283**	**1,396**	**1,420**	**1,420**
	Double counting	**129,163**	**132,186**	**138,152**	**144,112**	**150,669**	**154,105**	**148,477**
	Double WZ	12,115	12,872	14,808	16,561	17,481	17,903	17,070
Culture and Creative Industries nos. 1–12		**117,047**	**119,314**	**123,344**	**127,552**	**133,187**	**136,202**	**131,407**
Share in Overall Economy		**2.8%**	**2.7%**	**2.7%**	**2.6%**	**2.6%**	**2.5%**	**2.7%**

Note: * Economic branch included in several market segments; ** Estimates or preliminary figures; ***Estimates for the entire economic branch; journalists also in broadcasting industry; broadcasting industries turnovers 2006 were corrected due to statistical changes; overall economy estimate 2009 according to production figures from national accounting -8.5% in 2009 (see table 3.2.3); differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 3.3: Culture and Creative Industries in Germany
Employees according to Economic Branches 2003 to 2009

WZ-2003	Economic Branch	Employees						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
1. Music Industry								
92.31.5	Own-account musicians, composers	2,280	2,338	2,438	2,471	2,532	2,623	2,665
92.31.2	Music and dance ensembles	7,410	7,338	7,320	7,368	7,184	7,208	7,226
22.14.0	Publishing of recorded music, music publishing	4,734	4,699	5,049	5,155	5,315	5,408	5,330
92.32.1	*Theatre/concert organisers	7,648	7,173	7,104	7,046	6,778	6,720	6,551
92.32.2	* Operation of opera houses, theatre and concert halls and similar facilities	3,531	3,388	3,330	3,347	3,376	3,423	3,498
92.32.5	* Technical activities in support of cultural and entertaining services	3,116	3,392	3,576	3,677	4,379	4,620	4,964
52.45.3	Retail sale of musical instruments and scores	6,249	6,043	5,835	5,920	6,016	6,079	6,109
	Market segment total	**34,968**	**34,371**	**34,652**	**34,984**	**35,580**	**36,081**	**36,342**
2. Book Market								
92.31.6	*Own-account writers	5,270	5,598	5,898	6,179	6,388	6,746	6,903
22.11.1	Book publishing	47,133	44,190	43,357	43,136	40,197	39,739	37,466
52.47.2	Retail sale of books	33,938	33,359	32,763	32,182	31,978	31,866	30,238
	Market segment total	**86,341**	**83,147**	**82,018**	**81,497**	**78,563**	**78,351**	**74,607**
3. Art Market								
92.31.3	*Own-account artists	8,730	8,844	9,158	9,489	9,869	10,514	10,707
52.48.2***	Retail sale of art (estimate)	3,893	3,826	3,757	3,670	3,604	3,642	3,693
92.52.1	Museum shops and (estimate) art exhibitions	1,994	2,049	2,039	2,090	2,148	2,147	2,170
	Market segment total	**14,617**	**14,719**	**14,953**	**15,249**	**15,621**	**16,303**	**16,570**
4. Film Industry								
92.31.7	* Own-account stage artists	8,708	9,202	10,393	10,369	10,873	11,331	11,558
92.11.0	Motion picture and video productions	29,963	31,215	31,664	30,682	31,779	33,472	33,682
92.12.0	Motion picture and video distribution	4,054	4,001	3,697	3,641	3,643	3,745	3,410
92.13.0	Cinemas	12,041	10,536	9,775	9,158	9,289	9,060	9,278
	Market segment total	**54,766**	**54,954**	**55,529**	**53,850**	**55,584**	**57,608**	**57,927**

WZ-2003	Economic Branch	Employees						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
5. Broadcasting Industry								
92.40.2	*Own-account journalists	14,534	15,511	16,744	18,174	19,165	19,742	20,307
92.20.0	Radio and television activities	22,171	22,727	23,609	23,347	24,638	24,960	26,107
	Market segment total	**36,705**	**38,238**	**40,353**	**41,521**	**43,803**	**44,702**	**46,413**
6. Performing Arts Market								
92.31.7	*Own-account stage artists	8,708	9,202	10,393	10,369	10,873	11,331	11,558
92.31.8	Own-account performers	559	573	590	626	628	637	621
92.31.1	*Theatre ensembles	1,334	1,305	1,284	1,233	1,218	1,210	1,231
92.32.1	*Theatre/concert organisers	7,648	7,173	7,104	7,046	6,778	6,720	6,551
92.32.2	* Operation of opera houses, theatre and concert halls and similar facilities	3,531	3,388	3,330	3,347	3,376	3,423	3,498
92.32.3	Variety theatres and cabarets	838	782	806	807	847	867	917
92.32.5	* Technical activities in support of cultural and entertaining	3,116	3,392	3,576	3,677	4,379	4,620	4,964
92.34.1	Dancing school/from 2009 cultural lessons	2,808	2,827	2,851	3,020	3,156	3,351	4,188
92.34.2	*Other entertainment activities (circus, acrobats, puppet theatres)	4,401	4,806	6,271	6,774	6,956	7,621	7,728
	Market segment total	**32,943**	**33,447**	**36,205**	**36,899**	**38,211**	**39,780**	**41,256**
7. Design Industry								
74.20.6	Industrial design	7,359	7,691	8,202	8,683	9,302	9,639	9,519
74.87.4	Product-/fashion-/graphic design	16,578	17,193	18,011	19,133	19,681	20,894	22,075
74.40.1	*Communication design/advertising design	92,959	89,921	90,876	92,331	96,297	101,947	98,233
	Market segment total	**116,896**	**114,805**	**117,089**	**120,147**	**125,280**	**132,480**	**129,827**
8. Architectural Market								
74.20.1	Consulting architectural activities in building construction and interior design	93,101	88,494	85,609	84,251	84,339	87,010	86,950
74.20.2	Consulting architectural activities in town, city and regional planning	10,409	10,086	9,510	9,425	9,310	9,961	10,482
74.20.3	Consulting architectural activities in landscape architecture	6,417	6,093	5,866	5,950	6,051	6,359	6,489
	Market segment total	**109,927**	**104,673**	**100,985**	**99,626**	**99,700**	**103,330**	**103,921**
9. Press Market								
92.40.2	*Own-account journalists	14,534	15,511	16,744	18,174	19,165	19,742	20,307

WZ-2003	Economic Branch	Employees						
		Total 2003	Total 2004	Total 2005	Total 2006	Total 2007	Total 2008	Total 2009**
92.40.1	News agencies	8,543	8,294	7,428	7,201	7,390	7,779	7,773
22.11.2	Publishing of directories	3,783	3,604	3,620	3,701	4,394	4,550	4,429
22.12.0	Newspaper publishing	60,087	56,663	52,543	50,971	50,231	49,846	49,707
22.13.0	Publishing of journals and periodicals	37,861	36,794	37,108	36,759	37,429	37,116	36,356
22.15.0	Other publishing	6,750	7,162	7,240	7,554	7,809	7,700	7,903
	Market segment total	**131,558**	**128,028**	**124,683**	**124,360**	**126,418**	**126,733**	**126,475**
10. Advertising Market								
74.40.1	* Activities of advertising consultants, window dressing	92,959	89,921	90,876	92,331	96,297	101,947	-
74.40.2	Dissemination of advertising media and activities of advertising agencies	52,820	50,849	49,061	49,690	49,748	50,887	-
	Market segment total	**145,779**	**140,770**	**139,937**	**142,021**	**146,045**	**152,834**	**149,216**
11. Software-/Games Industry								
72.20.1	Software publishing	585	654	693	1,090	1,324	1,395	-
72.20.2	Software consultancy and development	278,059	276,375	290,613	304,715	325,038	345,528	-
	Market segment total	**278,644**	**277,029**	**291,306**	**305,805**	**326,362**	**346,923**	**367,913**
12. Other Activities								
92.31.4	Own-account restorers	2,776	2,591	2,602	2,671	2,689	2,695	2,695
92.51.0	Libraries/archives	1,127	1,084	1,034	1,037	1,004	1,006	1,006
92.52.2	Operation of historical sites and building	230	228	219	188	180	187	187
92.53.0	Botanical and zoological gardens and nature reserves	733	748	731	770	811	807	807
92.33.0	Fairs and amusement parks	13,921	14,117	13,610	13,576	13,811	13,496	13,496
	Market segment total	**18,787**	**18,768**	**18,196**	**18,242**	**18,494**	**18,191**	**18,189**
	Double countings	**1,061,932**	**1,042,949**	**1,055,906**	**1,074,201**	**1,109,662**	**1,153,315**	**1,168,656**
	Double WZ	130,496	128,587	132,023	134,944	140,868	147,783	145,110
Culture and Creative Industries nos. 1–12		**931,435**	**914,362**	**923,883**	**939,257**	**968,794**	**1,005,532**	**1,023,546**
Share in Overall Economy		**3.1%**	**3.1%**	**3.2%**	**3.2%**	**3.2%**	**3.3%**	**3.3%**

Note: * Economic branch included in several market segments; ** Estimates or preliminary figures; ***Estimates for the entire economic branch; journalists also in broadcasting industry; broadcasting industry estimate of 35% exchanged for yearly changing shares: 35, 36, 37, 39, 39% for the years 2003 to 2008, see also Goldmedia: Wirtschaftliche Lage des Rundfunks in Deutschland 2008/2009. Im Auftrag von acht Landesmedienanstalten unter Federführung der Bayerischen Landeszentrale für neue Medien (BLM). [The Economic Situation of Broadcasting in Germany 2008/2009. Commissioned by eight State Media Authorities managed by the Bavarian Regulatory Authority for Commercial Broadcasting (BML)], Berlin 2010; estimates for parts of the economic branch; differences due to rounding errors; see also notes in table 1.

Source: Turnover tax statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 4: Culture and Creative Industries According to Size Ranges, 2008

Type of enterprise 2008	Size range	Enterprise	%-share of enterprise	Turnover in thousand €	%-share turnover	Turnover per enterprise in thousand €
		2008	**2008**	**2008**	**2008**	**2008**
Micro enterprises	up to 2 million €	225,868	97%	36,382,121	26.7%	161
Small enterprises	up to 10 million €	5,336	2%	21,877,743	16.1%	4,100
Medium enterprises	up to 50 million €	1,083	0%	22,292,721	16.4%	20,581
Major companies	over 50 million €	292	0%	55,648,832	40.9%	190,777
All types of enterprises	**Total**	**232,578**	**100%**	**136,201,418**	**100%**	**586**
Changes 2008 compared to 2006 in %						
Micro enterprises	up to 2 million €	6%	-	6%	-	0%
Small enterprises	up to 10 million €	10%	-	11%	-	1%
Medium enterprises	up to 50 million €	4%	-	3%	-	-1%
Major companies	over 50 million €	7%	-	10%	-	2%
All types of enterprises	**Total**	**6%**	-	**8%**	-	**2%**
Type of enterprise 2006	**Size range**	**Enterprise**	**%-share enterprises**	**Turnover in thousand €**	**%-share turnover**	**Turnover per enterprise in thousand €**
		2006	**2006**	**2006**	**2006**	**2006**
Micro enterprises	up to 2 million	213,225	97%	34,275,252	27.1%	161
Small enterprises	up to 10 million	4,839	2%	19,726,381	15.6%	4,077
Medium enterprises	up to 50 million	1,041	0%	21,600,319	17.1%	20,753
Major companies	over 50 million	271	0%	50,776,092	40.2%	187,053
All types of enterprises	**Total**	**219,376**	**100%**	**126,378,043**	**100%**	**576**

Note: The sub-groups correspond with the following statistical groups: No. 22.1, 92.1-5, 72.2, 74.20.1-3 and 6, 744, 74.87.4 and 52.47 (Cultural trade estimated 62.11%, enterprises + 74,80% turnover; deviations from data in table 1 may be due to estimates in cultural trade; differences due to rounding errors; see also notes in table 1.

Source: Turnover Tax Statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 5.1: Culture and Creative Industries in Germany 2003 – 2009 Development of Enterprises

Market segment	Average annual change 2003–2009*	Change 2009*/2003	Average annual change 2003–2008	Change 2008/2003
Music industry	**1.7%**	10.9%	**1.9%**	10.0%
Book market	**1.6%**	10.1%	**1.8%**	9.4%
Art market	**3.0%**	19.1%	**3.1%**	16.7%
Film industry	**3.5%**	22.9%	**3.8%**	20.6%
Broadcasting industry	**5.9%**	41.1%	**6.5%**	37.1%
Performing arts market	**4.9%**	33.5%	**5.5%**	30.4%
Design industry	**4.2%**	28.0%	**4.7%**	25.7%
Architectural market	**1.9%**	11.6%	**2.0%**	10.4%
Press market	**4.3%**	29.0%	**4.7%**	26.1%
Advertising market	**1.7%**	10.5%	**1.9%**	9.7%
Software-/Games-ind.	**7.2%**	51.4%	**7.9%**	46.6%
Culture and Creative Industries	**3.4%**	**22.1%**	**3.7%**	**20.0%**
Overall economy	**1.6%**	10.2%	**1.8%**	9.3%

Note: See also notes in tables 1 and 2.

Source: Turnover Tax Statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 5.2: Culture and Creative Industries in Germany 2003 – 2009 Development of Turnover

Market segment	Average annual change 2003–2009*	Change 2009*/2003	Average annual change 2003–2008	Change 2008/2003
Music industry	**2.0%**	12.3%	**2.6%**	13.5%
Book market	**0.9%**	5.4%	**0.6%**	3.1%
Art market	**3.6%**	23.5%	**5.5%**	30.6%
Film industry	**-1.6%**	-9.1%	**-1.5%**	-7.4%
Broadcasting industry	**1.3%**	7.9%	**3.2%**	17.3%
Performing arts market	**5.8%**	40.4%	**7.3%**	42.5%
Design industry	**5.8%**	40.2%	**8.0%**	47.2%
Architectural market	**2.1%**	13.4%	**2.5%**	13.4%
Press market	**-0.4%**	-2.6%	**0.1%**	0.7%
Advertising market	**1.9%**	11.9%	**3.5%**	19.0%
Software-/Games-ind.	**6.5%**	45.5%	**8.9%**	53.2%
Culture and Creative Industries	**1.9%**	**12.3%**	**3.1%**	**16.4%**
Overall economy	**2.6%**	16.6%	**5.0%**	27.4%

Note: See also notes in tables 1 and 2.

Source: Turnover Tax Statistics, Destatis 2010; calculations by Michael Soendermann/Office for Culture Industries Research

Table 5.3: Culture and Creative Industries in Germany, 2003 – 2009 Development of employment (self-employed persons and employees liable to social insurance deductions)

Market segment	Average annual change 2003–2009*	Change 2009*/2003	Average annual change 2003–2008	Change 2008/2003
Music industry	**0.6%**	3.9%	**0.6%**	3.2%
Book market	**-2.4%**	-13.6%	**-1.9%**	-9.3%
Art market	**2.1%**	13.4%	**2.2%**	11.5%
Film industry	**0.9%**	5.8%	**1.0%**	5.2%
Broadcasting industry	**4.0%**	26.4%	**4.0%**	21.8%
Performing arts market	**3.8%**	25.2%	**3.8%**	20.8%
Design industry	**1.8%**	11.1%	**2.5%**	13.3%
Architectural market	**-0.9%**	-5.5%	**-1.2%**	-6.0%
Press market	**-0.7%**	-3.9%	**-0.7%**	-3.7%
Advertising market	**0.4%**	2.4%	**0.9%**	4.8%
Software-/Games-ind.	**4.7%**	32.0%	**4.5%**	24.5%
Culture and Creative Industries	**1.6%**	**9.9%**	**1.5%**	**8.0%**
Overall economy	**0.4%**	2.4%	**0.5%**	2.6%

Note: See also notes in tables 1 and 2.

Source: Turnover Tax Statistics, Destatis 2010; Employment Statistics, Federal Agency for Employment 2010, calculations by Michael Soendermann/Office for Culture Industries Research

Table 5.4: Culture and Creative Industries in Germany, 2003 – 2009 Development of Employees

Market segment	Average annual change 2003–2009*	Change 2009*/2003	Average annual change 2003–2008	Change 2008/2003
Music industry	**0.2%**	1.2%	**0.1%**	0.4%
Book market	**-3.2%**	-17.7%	**-2.6%**	-12.5%
Art market	**0.0%**	-0.3%	**-0.1%**	-0.7%
Film industry	**-0.2%**	-1.1%	**-0.2%**	-1.0%
Broadcasting industry	**2.7%**	17.5%	**2.4%**	12.4%
Performing arts market	**2.9%**	18.8%	**2.5%**	13.3%
Design industry	**0.7%**	4.4%	**1.6%**	8.5%
Architectural market	**-2.5%**	-14.1%	**-3.0%**	-14.3%
Press market	**-1.7%**	-9.6%	**-1.8%**	-8.8%
Advertising market	**-0.1%**	-0.4%	**0.6%**	3.2%
Software-/Games-ind.	**4.5%**	29.9%	**4.1%**	22.1%
Culture and Creative Industries	**1.1%**	**6.7%**	**0.9%**	**4.8%**
Overall economy	**0.3%**	1.6%	**0.4%**	1.9%

Note: See also notes in tables 1 and 2.

Source: Turnover Tax Statistics, Destatis 2010; Employment Statistics, Federal Agency for Employment 2010, calculations by Michael Soendermann/Office for Culture Industries Research

Table 6: Statistical Classification of Culture and Creative Industries according to WZ 2003 Culture and Creative Industries in Germany, Monitoring Report 2010

Market segment		Share in %	
WZ-2003	**Economic branch**	**UST**	**SVB**
1. Music Industry			
92.31.5	Own-account musician, composers		
92.31.2	Music and dance ensembles		
22.14.0	Publishing of recorded music, music publishing		
92.32.1	*Theatre/concert organisers		
92.32.2	* Operation of opera houses, theatre and concert halls and similar facilities		10%
92.32.5	* Technical activities in support of cultural and entertaining services		
52.45.3	Retail sale of musical instruments and scores		
	Market segment total		
2. Book Market			
92.31.6	*Own-account writers		
22.11.1	Book publishing		
52.47.2	Retail sale of books		
	Market segment total		
3. Art Market			
92.31.3	*Own-account artists		
52.48.2**	Retail sale of art (estimate)	20%	20%
92.52.1	Museum shops and (estimate) art exhibitions		8%
	Market segment total		
4. Film Industry			
92.31.7	* Own-account stage artists		
92.11.0	Motion picture and video productions		
92.12.0	Motion picture and video distribution		
92.13.0	Cinemas		
	Market segment total		
5. Broadcasting Industry			
92.40.2	*Own-account journalists		
92.20.0	Radio and television activities		see Notes
	Market segment total		
6. Performing Arts Market			
92.31.7	*Own-account stage artists		
92.31.8	Own-account performers		

Market segment		Share in %	
WZ-2003	**Economic branch**	**UST**	**SVB**
92.31.1	*Theatre ensembles		10%
92.32.1	*Theatre/concert organisers		
92.32.2	* Operation of opera houses, theatre and concert halls and similar facilities		10%
92.32.3	Variety theatres and cabarets		
92.32.5	* Technical activities in support of cultural and entertaining		
92.34.1	Dancing school/from 2009 cultural lessons		
92.34.2	*Other entertainment activities (circus, acrobats, puppet theatres)		
	Market segment total		
7. Design Industry			
74.20.6	Industrial design		
74.87.4	Product/ fashion/graphic design		
74.40.1	*Communication design/Advertising design		
	Market segment total		
8. Architectural Market			
74.20.1	Consulting architectural activities in building construction and interior design		
74.20.2	Consulting architectural activities in town, city and regional planning		
74.20.3	Consulting architectural activities in landscape architecture		
	Market segment total		
9. Press Market			
92.40.2	*Own-account journalists		
92.40.1	News agencies		
22.11.2	Publishing of directories		
22.12.0	Newspaper publishing		
22.13.0	Publishing of journals and periodicals		
22.15.0	Other publishing		
	Market segment total		
10. Advertising Market			
74.40.1	*Communication design/Advertising design		
74.40.2	Dissemination of advertising media and activities of advertising agencies		
	Market segment total		
11. Software-/Games Industry			
72.20.1	Software publishing		
72.20.2	Software consultancy and development		
	Market segment total		

Market segment		Share in %	
WZ-2003	**Economic branch**	**UST**	**SVB**
12. Other activities			
92.31.4	Own-account restorers		
92.51.0	Libraries/archives		8 %
92.52.2	Operation of historical sites and building		8 %
92.53.0	Botanical and zoological gardens and nature reserves		8 %
92.33.0	Fairs and amusement parks		
	Market segment total		
Including double countings (total of all economic branches including double countings)			
Total of economic branches with double counting			
Culture and Creative Industries (nos. 1–12) (no double countings)			

Note: *Economic branches assigned to several market segments (marked in blue); in the 2010 report presented now own-account journalists are assigned to press market and broadcasting industry; dancing schools have been expanded to cultural education starting from 2009. In broadcasting industry the estimated share of 35 % was replaced by the respective annual shares: 35, 36, 38, 37, 39, 39 % für die Jahre 2003–2009, see also: Goldmedia: Wirtschaftliche Lage des Rundfunks in Deutschland 2008/2009. Im Auftrag von acht Landesmedien-anstalten unter Federführung der Bayerischen Landeszentrale für neue Medien (BLM). [The Economic Situation of Broadcasting in Germany 2008/2009. Commissioned by eight State Media Authorities managed by the Bavarian Regulatory Authority for Commercial Broadcasting (BML)], Berlin 2010; UST = Turnover tax statistics, SVB = employment statistics.

Source: Destatis, Classification of Economic Branches WZ 2003, calculations by Michael Soendermann/Office for Culture Industries Research

Table 7: The German Framework for Culture & Creative Industries Statistics according to international ISIC Rev.4, European NACE Rev.2 and German WZ2008

List of statistical activities for cultural and creative economic activities defined with 4- and 5-digit codes

ISIC Rev.4	Nace Rev.2	WZ2008	NACE-/WZ-Description
4-digit-level	4-digit-level	5-digit-level	
Core activities of the Culture & Creative Industries (CCI)			
5811	58.11	58.11.0	Book publishing
5812	58.12	58.12.0	Publishing of directories and mailing lists
5813*	58.13	58.13.0	Publishing of newspapers
5813*	58.14	58.14.0	Publishing of journals and periodicals
5819	58.19	58.19.0	Other publishing activities
5820*	58.21	58.21.0	Publishing of computer games
5820*	58.29	58.29.0	Other software publishing
5911	59.11	59.11.0	Motion picture, video and television programme production activities
5912	59.12	59.12.0	Motion picture, video and television programme post-production activities
5913	59.13	59.13.0	Motion picture, video and television programme distribution activities
5914	59.14	59.14.0	Motion picture projection activities
5920	59.20	59.20.1	Activities of sound-recording studios and production of taped radio programming
		59.20.2	Publishing of sound recordings
		59.20.3	Publishing of printed music
6010	60.10	60.10.0	Radio broadcasting
6020	60.20	60.20.0	Television programming and broadcasting activities
6201	62.01	62.01.1	Web-page design and programming
		62.01.9	Other software development
6312	63.12	63.12.0	Web portals
6391	63.91	63.91.0	News agency activities
7110*	71.11	71.11.1	Consulting architectural activities in building construction
		71.11.2	Consulting architectural activities in interior design
		71.11.3	Consulting architectural activities in town, city and regional planning
		71.11.4	Consulting architectural activities in landscape architecture
7310*	73.11	73.11.0	Advertising agencies
7310*	73.12	73.12.0	Media representation
7410	74.10	74.10.1	Activities of industrial, product and fashion designers
		74.10.2	Activities of graphics and communications designers
		74.10.3	Activities of interior decorators
7420	74.20	74.20.1	Activities of photographers
		74.20.2	Activities of photographic laboratories
7490*	74.30	74.30.1	Translation activities
		74.30.2	Interpretation activities
7722	77.22	77.22.0	Renting of video tapes and disks

ISIC Rev.4	Nace Rev.2	WZ2008	NACE-/WZ-Description
4-digit-level	4-digit-level	5-digit-level	
8542	85.52	85.52.0	Cultural education
9000*	90.01	90.01.1	Activities of theatre ensembles
		90.01.2	Activities of ballet companies, orchestras, bands and choirs
		90.01.3	Activities of own-account performers and circus groups
		90.01.4	Activities of own-account stage, motion picture, radio and television artists and other performing arts activities
9000*	90.02	90.02.0	Support activities to performing arts
9000*	90.03	90.03.1	Activities of own-account composers, arranging of music
		90.03.2	Activities of own-account writers
		90.03.3	Activities of own-account visual artists
		90.03.4	Activities of own-account restorers
		90.03.5	Activities of own-account journalists and press photographers
9000*	90.04	90.04.1	Organisation of theatre performances and concerts
		90.04.2	Operation of opera houses, theatre and concert halls and similar facilities
		90.04.3	Operation of variety theatres and cabarets
9101	91.01	91.01.0	Library and archives activities
9102*	91.02	91.02.0	Museums activities
9102*	91.03	91.03.0	Operation of historical sites and buildings and similar visitor attractions
9103	91.04	91.04.0	Botanical and zoological gardens and nature reserves activities
Retail sale activities in the CCI			
4759*	47.59	47.59.3	Retail sale of musical instruments and scores in specialised stores
4761*	47.61	47.61.0	Retail sale of books in specialised stores
4761*	47.62	47.62.1	Retail sale of newspapers, journals and periodicals in specialised stores
		47.62.2	Retail sale of stationery, school and office supplies in specialised stores
4762	47.63	47.63.0	Retail sale of music and video recordings in specialised stores
4773*	47.78	47.78.3	Retail sale of art, pictures, craftwork, stamps, coins and gifts in specialised stores
Manufacturing activities in the CCI or related activities			
2310	23.13	23.13.0	Manufacture of hollow glass
2393*	23.41	23.41.0	Manufacture of ceramic household and ornamental articles
2393*	23.49	23.49.0	Manufacture of other ceramic products
3211*	32.12	32.12.0	Manufacture of jewellery and related articles
3220	32.20	32.20.0	Manufacture of musical instruments
???	???	???	further manufacturing activities

Notes: ISIC Rev.4 = International Standard Industrial Classification of All Economic Activities, Rev.4, United Nations Statistics Division, 2008,
*proportion of the class; **NACE Rev.2** = Statistical classification of economic activities in the European Community, 2008;
WZ 2008 = German Classification of Economic Activities, 2008.
draft version September 2010

Source: Arbeitskreis Kulturstatistik e.V./German Working Group on Cultural Statistics, Berlin/Cologne 2010

Table 8: The German Culture & Creative Industries Statistics by market segments according to international classifications

List of statistical activities by market segments defined with 4 and 5-digit codes

WZ2008 Germany	WZ-Description	Nace Rev.2 Europe	ISIC Rev.4 UN
1. Music Industry			
90.03.1	Activities of own-account composers, arranging of music	90.03*	9000*
90.01.2	Activities of ballet companies, orchestras, bands and choirs	90.01*	9000*
32.20.0	Manufacture of musical instruments	32.20	3220
59.20.1	**Activities of sound-recording studios, production of taped radio programming	59.20*	5920*
59.20.2	Publishing of sound recordings	59.20*	5920*
59.20.3	Publishing of printed music	59.20*	5920*
90.04.1	**Organisation of theatre performances and concerts	90.04*	9000*
90.04.2	**Operation of opera houses, theatre and concert halls and similar facilities	90.04*	9000*
90.02.0	**Support activities to performing arts	90.02	9000*
47.59.3	Retail sale of musical instruments and scores in specialised stores	47.59	4759*
47.63.0	Retail sale of music and video recordings in specialised stores	47.63	4762
2. Book Market			
90.03.2	Activities of own-account writers	90.03*	9000*
58.11.0	Book publishing	58.11	5811
47.61.0	Retail sale of books in specialised stores	47.61	4761*
91.01.0	Library and archives activities (only market oriented)	91.01	9101
3. Art Market			
90.03.3	Activities of own-account visual artists	90.03*	9000*
74.20.1	Activities of photographers	74.20*	7420*
47.78.3	***Retail sale of art, pictures, craftwork (proportion without stamps, coins and gifts in specialised stores)	47.78*	4773*
91.02.0	Museums activities (only market oriented)	91.02	9102*
4. Film Industry			
90.01.4	**Activities of own-account stage, motion picture, radio and television artists and other performing arts activities	90.01*	9000*
59.11.0	Motion picture, video and television programme production activities	59.11	5911
59.12.0	Motion picture, video and television programme post-production activities	59.12	5912
59.13.0	Motion picture, video and television programme distribution activities	59.13	5913
77.22.0	Renting of video tapes and disks	77.22	7722
59.14.0	Motion picture projection activities	59.14	5914
5. Broadcasting Industry			
90.03.5	**Activities of own-account journalists and press photographers	90.03*	9000*

WZ2008 Germany	WZ-Description	Nace Rev.2 Europe	ISIC Rev.4 UN
59.20.1	**Activities of sound-recording studios and production of taped radio programming	59.20*	5920*
60.10.0	Radio broadcasting (only market oriented)	60.10	6010
60.20.0	Television programming and broadcasting activities (only market oriented)	60.20	6020
6. Performing Arts Market			
90.01.4	**Activities of own-account stage, motion picture, radio and television artists and other performing arts activities	90.01*	9000*
90.01.1	Activities of theatre ensembles (only market oriented)	90.01*	9000*
90.01.3	Activities of own-account performers and circus groups	90.01*	9000*
90.02.0	**Support activities to performing arts	90.02	9000*
90.04.1	**Organisation of theatre performances and concerts	90.04*	9000*
90.04.2	**Operation of opera houses, theatre and concert halls and similar facilities (only market oriented)	90.04*	9000*
90.04.3	Operation of variety theatres and cabarets	90.04*	9000*
85.52.0	Cultural education (only market oriented)	85.52	8542
7. Design Industry			
74.10.1	Activities of industrial, product and fashion designers	74.10*	7410*
74.10.2	Activities of graphics and communications designers	74.10*	7410*
74.10.3	Activities of interior decorators	74.10*	7410*
71.11.2	**Consulting architectural activities in interior design	71.11*	7110*
73.11.0	**Advertising agencies	73.11	7310*
8. Architectural Market			
71.11.1	Consulting architectural activities in building construction	71.11*	7110*
71.11.2	**Consulting architectural activities in interior design	71.11*	7110*
71.11.3	Consulting architectural activities in town, city and regional planning	71.11*	7110*
71.11.4	Consulting architectural activities in landscape architecture	71.11*	7110*
9. Press Market			
90.03.5	**Activities of own-account journalists and press photographers	90.03*	9000*
63.91.0	News agency activities	63.91	6391
74.30.1	Translation activities	74.30*	7490*
74.30.2	Interpretation activities	74.30*	7490*
58.13.0	Publishing of newspapers	58.13	5813*
58.14.0	Publishing of journals and periodicals	58.14	5813*
47.62.1	Retail sale of newspapers, journals and periodicals in specialised stores	47.62*	4761*
10. Advertising Market			
73.11.0	**Advertising agencies	73.11	7310*

WZ2008 Germany	WZ-Description	Nace Rev.2 Europe	ISIC Rev.4 UN
73.12.0	Media representation	73.12	7310*
11. Games-/Software Industry			
58.21.0	Publishing of computer games	58.21	5820*
63.12.0	Web portals	63.12	6312
62.01.1	Web-page design and programming	62.01*	6201*
62.01.9	Other software development	62.01*	6201*
58.29.0	Other software publishing	58.29	5820*
12. Arts and Crafts			
90.03.4	Activities of own-account restorers	90.03*	9000*
91.03.0	Operation of historical sites and buildings and similar visitor attractions (only market oriented)	91.03	9102*
23.13.0	Manufacture of hollow glass	23.13	2310
23.41.0	Manufacture of ceramic household and ornamental articles	23.41	2393*
23.49.0	Manufacture of other ceramic products	23.49	2393*
32.12.0	Manufacture of jewellery and related articles	32.12	3211*
???	further manufacturing activities	???	???
13. Other Activities			
58.12.0	Publishing of directories and mailing lists	58.12	5812
58.19.0	Other publishing activities	58.19	5819
74.20.2	Activities of photographic laboratories	74.20*	7420*
47.62.2	Retail sale of stationery, school and office supplies in specialised stores	47.62*	4761*
91.04.0	Botanical and zoological gardens and nature reserves activities	91.04	9103

Notes: *proportion of 4-digit class, **allocated to more than one market, *** proportion of 5-digit subclass. **ISIC Rev.4** = International Standard Industrial Classification of All Economic Activities, Rev.4, United Nations Statistics Division, 2008, *proportion of the class;
NACE Rev.2 = Statistical classification of economic activities in the European Community, 2008;
WZ 2008 = German Classification of Economic Activities, 2008.
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Source: Arbeitskreis Kulturstatistik e.V./German Working Group on Cultural Statistics, Berlin/Cologne 2010