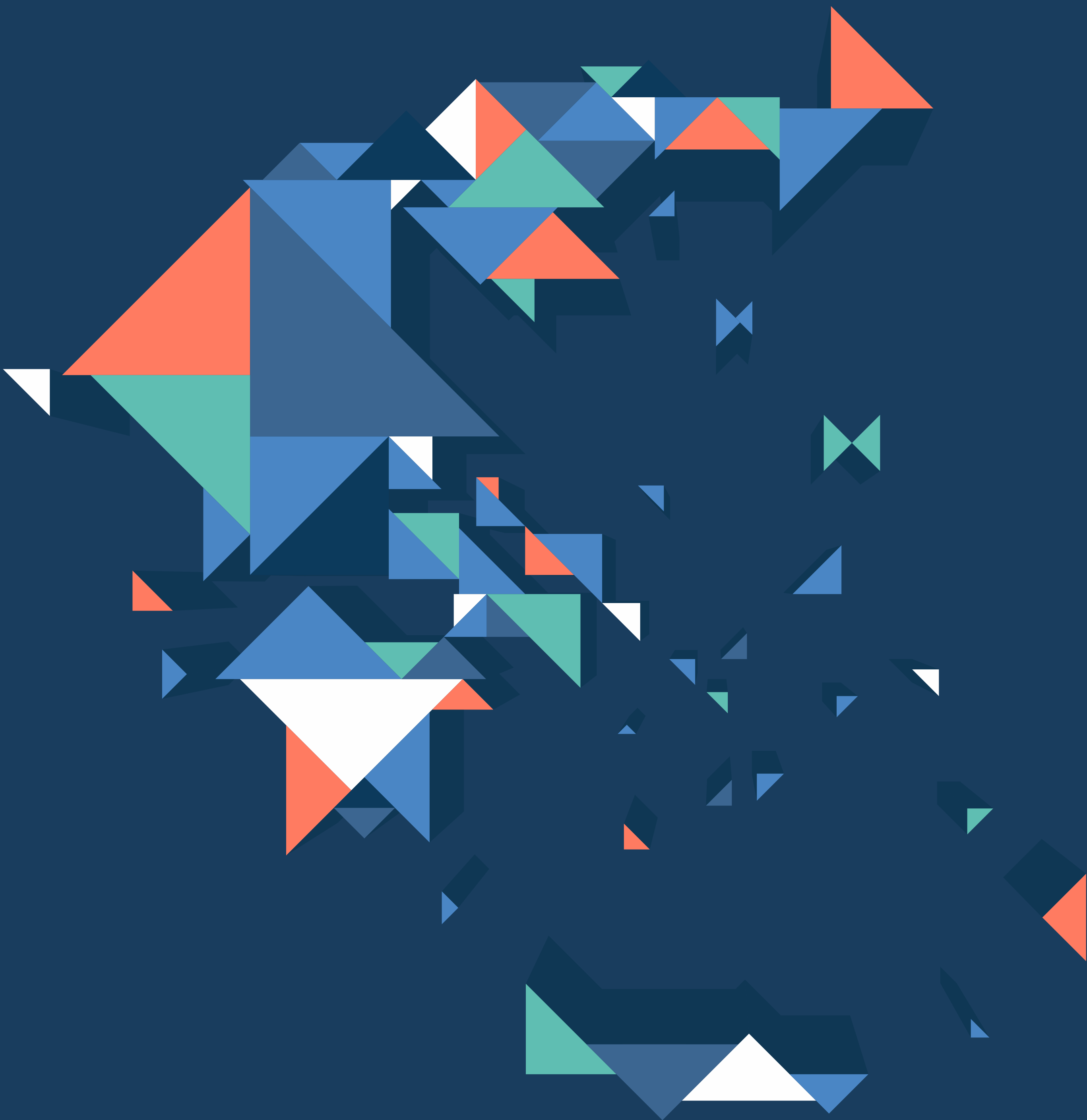
HELLENIC REPUBLIC
Ministry of Culture and Sports

Regional Development Institute
Panteion University

MAPPING THE CULTURAL AND CREATIVE INDUSTRIES IN GREECE



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The mapping of the Cultural and Creative industry in Greece has been a top priority for the Ministry of Culture and Sports during 2006. The lack of a suitable tool, which would support strategy and decision-making aimed at planning support actions for the professionals of the Contemporary Culture and Creative Economy, has led to the need of recording their growth dimension, in accordance with international practices. Until recently, the extremely limited relevant data appeared in fragmentary contributions and only in specific studies. This fact led the Ministry to commission a comprehensive Study, so that Greece eventually obtains, at both national and regional levels, a clear and complete overview of the Creative and Cultural Industry, in order to examine their contribution to the economy, employment, and society as a whole.

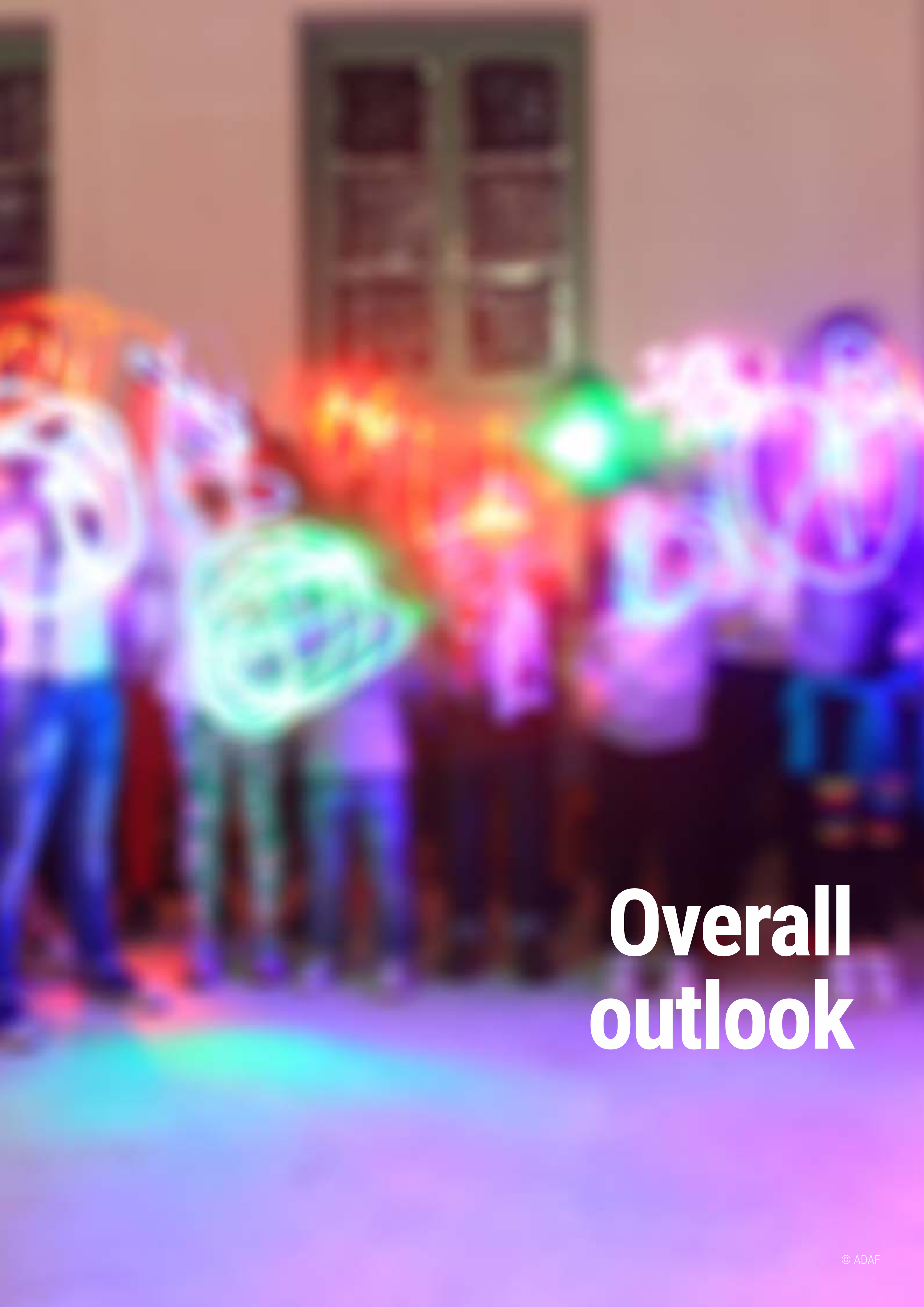
Funding from the Partnership Agreement for the European Development Framework 2014-2020 has allowed the implementation of this project. Following a competitive call, the Regional Development Institute of Panteion University carried out the study Mapping the Cultural - Creative Industry in Greece.

The study was conducted from September to December 2016. It benefited from the co-operation of all the relevant Services and Supervised Entities of the Ministry of Culture & Sports. It followed official Eurostat definitions of the sectors studied and contains both national and regional statistics. The study aims at demonstrating the growth potential of Culture and Creativity for Greece but also at developing evidence based policies, which will support these sectors with targeted actions. This briefing paper provides a concise presentation of the main results of the study. Its target groups are policy-makers of the Ministry of Culture and Sports or other relevant bodies, but also cultural organizations, culture professionals, researchers and any other interested party.

Hellenic Ministry of Culture and Sports
Executive Unit-Partnership Agreement for the Development Framework 2014-2020

What are the cultural and creative industries?

The term 'cultural and creative industries' or 'culture and creativity industries' (CCIs) usually encompasses any enterprise producing marketable goods of high aesthetic or symbolic nature, the use of which aims at stimulating consumers' reactions stemming from this experience. The end good or service comprises an intellectual property and a product subject to the legislation on the protection of intellectual property rights. That is to say, the term covers a wide and diverse range of activities (performing and visual arts, design, architecture, advertising, publishing, audiovisual media, software etc.), relevant to the wider field of culture.



Overall outlook

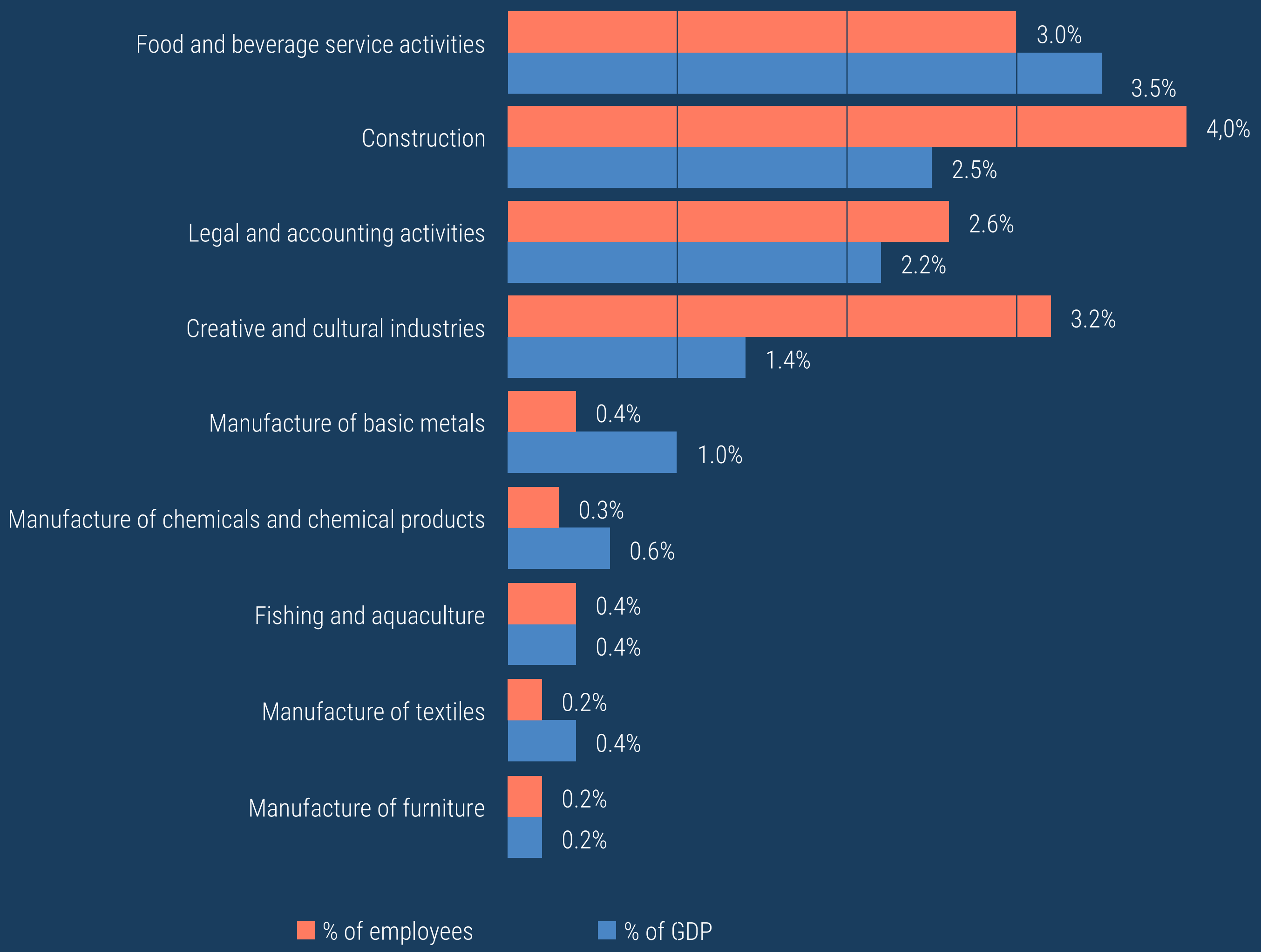
The cultural and creative sector in Greece in 2014 employed 110,688 employees in 46,370 enterprises, which sold symbolic goods and services of about € 5.3 bn, with about € 2.1 bn added value for the Greek economy, and 1.4% contribution to the GDP (Graph 1). Respectively, in the EU-28 CCIs contributed in 2014, 2.8% (€ 353 bn) to the European GDP, through 1.7 mn enterprises that employed 6.1 mn employees.

1 Key figures of the cultural and creative sector in Greece, 2014

Source: Eurostat, Ministry of Culture and Sports

The cultural and creative sector constitutes a fundamental pillar of the Greek economy, compared to other selected sectors for the year 2014 (Chart 1).

1 Key figures for selected sectors of the Greek economy, 2014



Source: Eurostat, ELSTAT, Ministry of Culture and Sports

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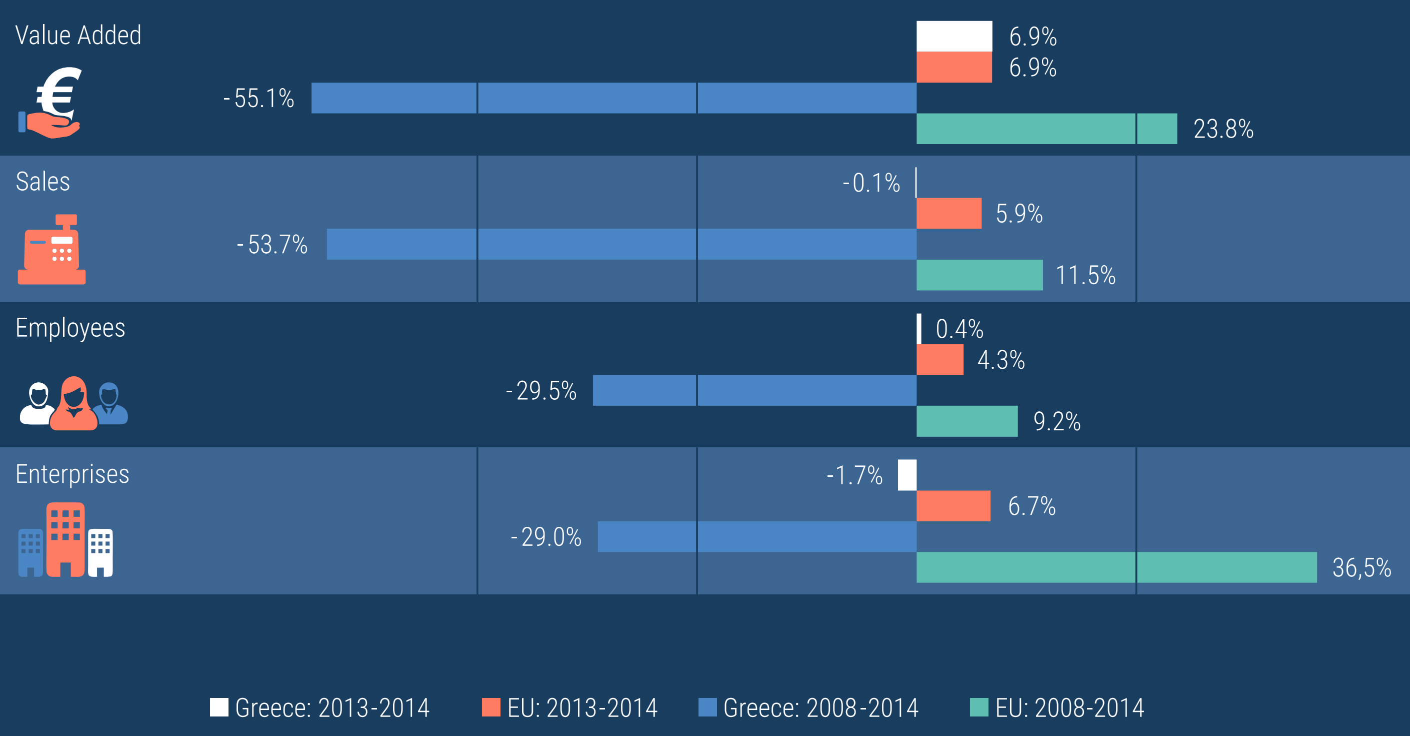
The financial crisis, which in Greece essentially began in 2009, had a strong impact on CCIs' key figures. From 2008 up to 2014, added value decreased by 55.1%, the number of employees was reduced by 29.5% and enterprises decreased by 27.9% (Chart 2). During the same period, an enormous upsurge in the number of enterprises has been observed in EU-28 (36.5%), which triggered an upsurge of added value (28.6%) and a less intense increase in the other variables (in sales by 11.5% and in employees by 9.2%).

2

Changes in key figures of the cultural and creative sector in Greece and in the EU-28, 2008-2014, 2013-2014



Source: Eurostat, Ministry of Culture and Sports

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The overall outlook of the cultural and creative industries in Greece shows that despite the enormous downfall they have experienced since 2008, in 2014 they record signs of recovery for the first time after six years. It should be noted that the adverse change (2008-2014) in most figures was much more intense than the recession in the Greek economy as a whole. That is to say, CCIs were affected by the recession more intensely than the Greek economy. On the other hand, it appears that for some CCIs growth also seems (at least for 2014) to increase intensely. Interim data of the annual turnover indicator (ELSTAT, 2016) for 2015 and the first half of 2016 show that the aforementioned upward trend will continue in the sectors of software publishing, specialized design, architecture, and libraries-museums. A stabilizing trend is expected for the sectors of advertising, printing-manufacturing-handicrafts, arts and audiovisual, while it appears that publishing and radio and TV enter another downturn of low intensity.

1

Number of employees and added value of Culture and Creativity Sectors, Greece, 2008-2014 and 2013-2014

	Employees			Added Value		
SECTORS	Number of employees 2014	2008-2014 change	2013-2014 change	Added value 2014 (in € mn)	2008-2014 change	2013-2014 change
Printing, manufacture and handicrafts	8,428	-36.80%	-7.00%	184.45	-36.50%	6.80%
Retail sale of cultural goods	5,909	-16.40%	5.80%	39.75	-56.70%	-11.20%
Publishing	16,224	-39.20%	1.30%	371.7	-52.30%	4.10%
Software publishing and computer programming	9,337	0.50%	3.50%	296.85	-30.20%	16.80%
Audiovisual	9,746	-32.20%	0.70%	208.1	-57.90%	54.80%
Television, radio and communication	7,357	-53.80%	15.20%	202.7	-71.00%	15.70%
Architecture	21,223	-27.70%	-0.10%	232.6	-77.20%	-15.70%
Advertising	11,370	-9.60%	-3.90%	271.2	-39.20%	3.90%
Specialised design	2,394	-0.20%	0.10%	29.3	-47.60%	27.90%
Arts and recreation	11,200	-11.10%	-10.40%	198.6	-40.90%	-6.70%
Libraries and museums	7,500	-43.60%	15.40%	88.8	-2.60%	16.80%
Total	110,688	-29.50%	0.40%	2,124.1	-55.10%	6.90%

Source: Eurostat, ELSTAT, Ministry of Culture and Sports

Added value

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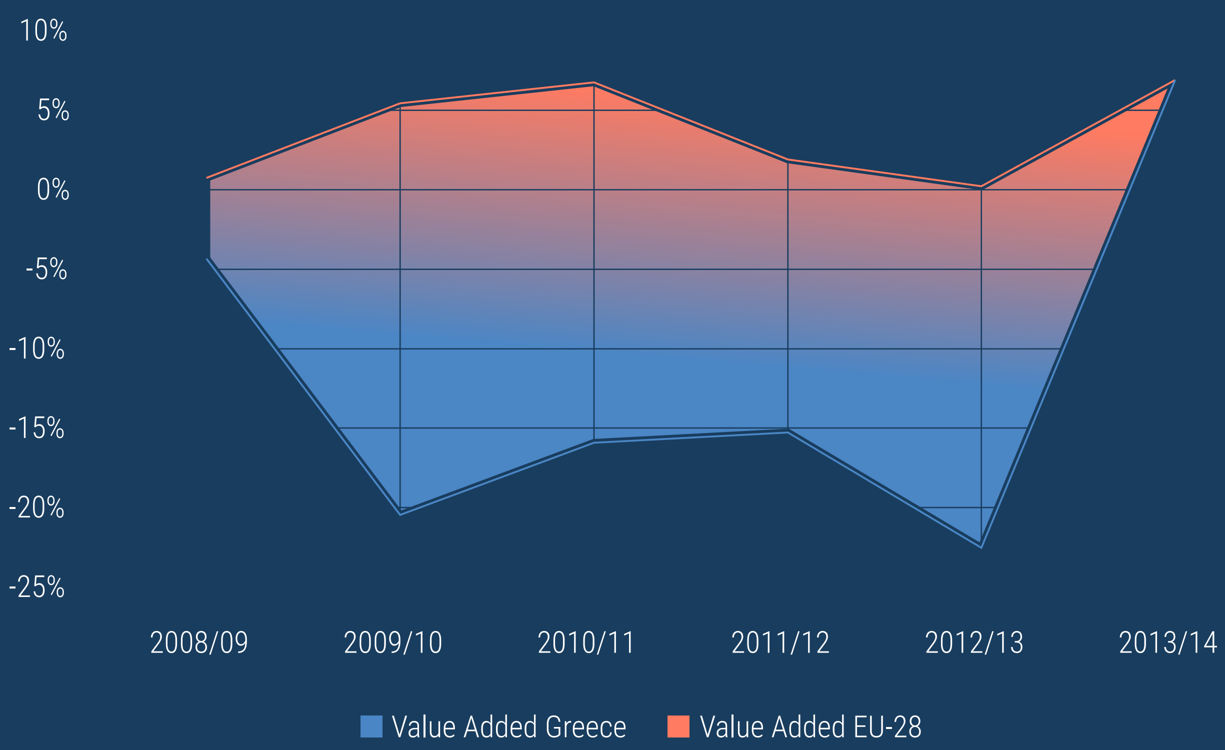
In 2008, the added value of CCIs in Greece was € 4.7 bn (2.2% of GDP), while in 2014 it was about € 2.1 bn (1.4% of GDP). The decline of CCIs' added value from 2008 up to 2014 in Greece reaches 55.1%, having an average annual decrease of about 11.9%, while during the same period in the EU-28 an increase is observed in added value by 23.8% cumulatively or about 3.7% annually (Chart 3). In 2014, Greece ranks 14th in EU-28 in added value produced in CCIs.

3

Percentage annual changes in the added value of the cultural and creative sector in Greece and EU-28, 2008-2014



Source: Eurostat, ELSTAT, Ministry of Culture and Sports.
There are not sufficient data on the sectors "Arts and recreation" and "Libraries and museums" for EU-28.

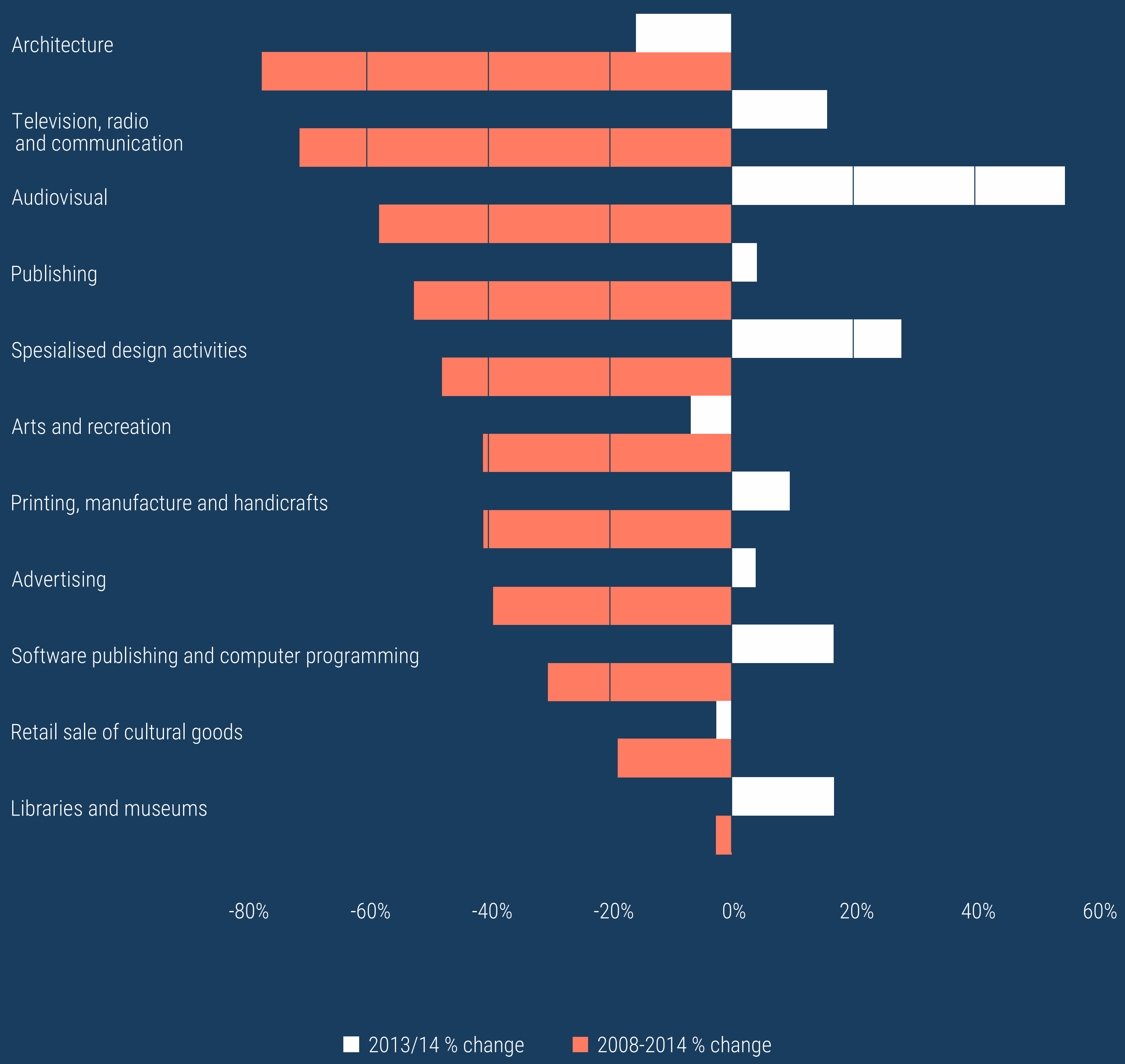
The sectors contributing the most to added value are publishing (€ 371 mn), software publishing and computer programming (€ 297 mn), the audiovisual sector (€ 208 mn) and the television, radio, and communication sector (€ 203 mn).

Despite the significant downfall observed cumulatively between 2008 and 2014, in 2013/14 the cultural and creative sector appears to be recovering with an increase in added value by 6.9% and a stability trend in the numbers of employees and creative enterprises.

The sectors of software and specialised design appear to have withstood the economic crisis, while in 2013/14 they increased their added value by 16.8% and 27.9% respectively. Other sectors that showed significant increase in added value in the period 2013/14 include the audiovisual (54.8%), libraries and museums (16.8%) and television, radio, and communication (15.7%) sectors.

4

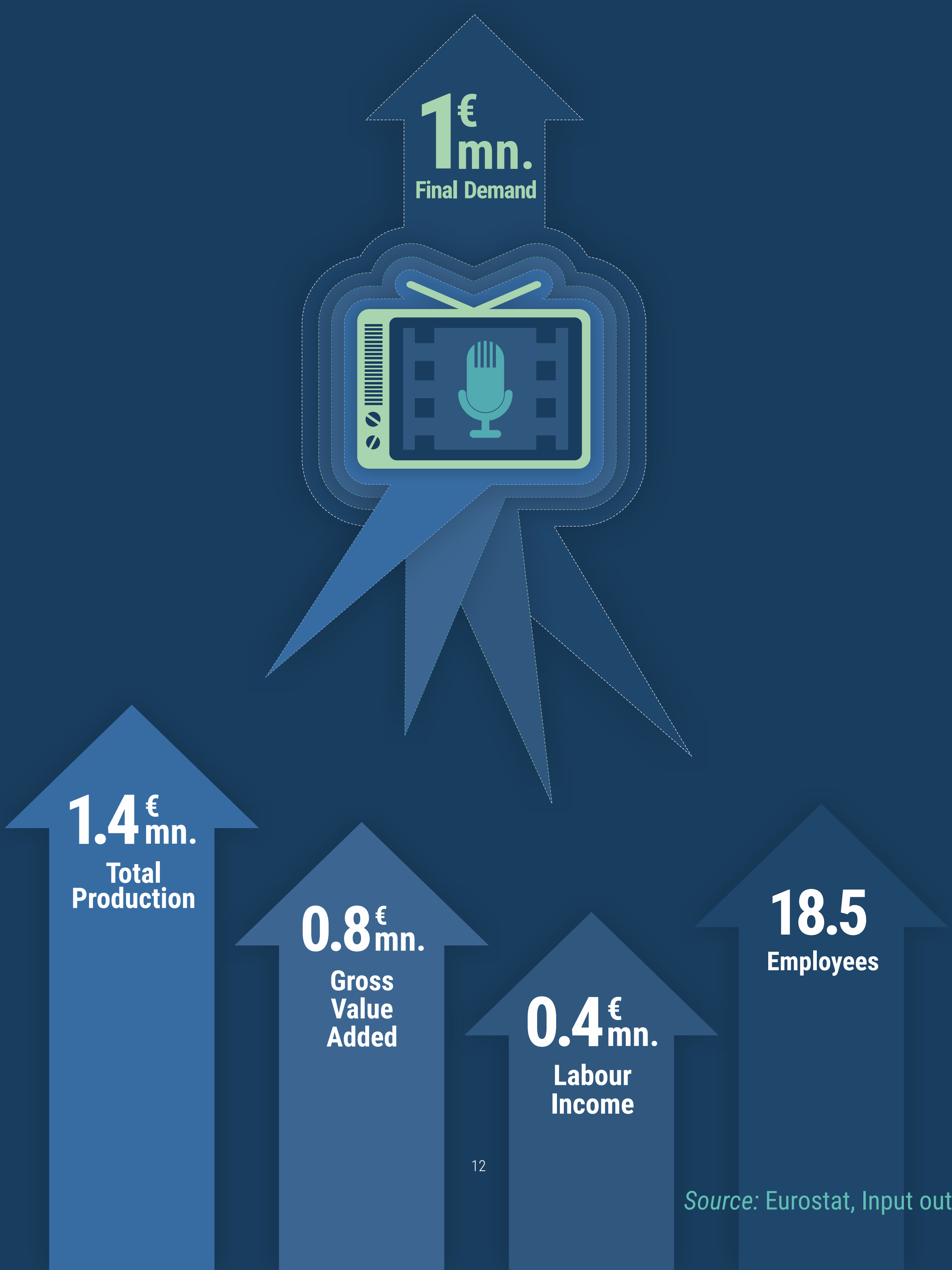
Percentage changes in CCIs' added value, Greece, 2008-2014, 2013-2014



Source: Eurostat, ELSTAT, Ministry of Culture and Sports

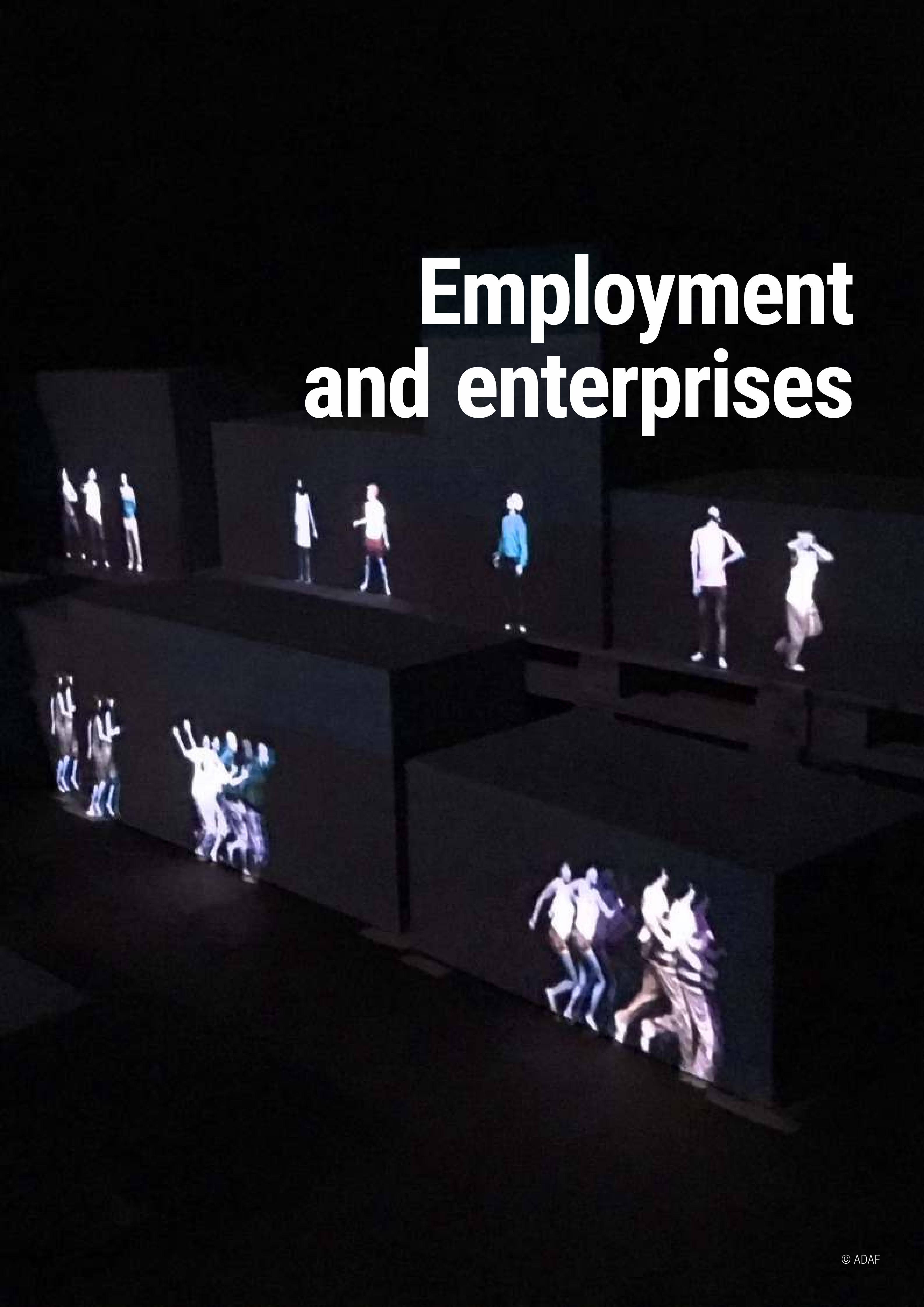
The advertising and audiovisual, radio and television industries have the biggest output multipliers on all the Greek economy sectors. Thus, an increase in final demand by € 1 mn. for the products of audiovisual, television and radio industries will increase the total production in the Greek economy by € 1.4 mn., the gross value added by € 0,8 mn., labour income by € 0,4 mn. and will create 18.5 new jobs in the Greek economy.

Multiplier effects of audiovisual industry



Source: Eurostat, Input output tables

Employment and enterprises



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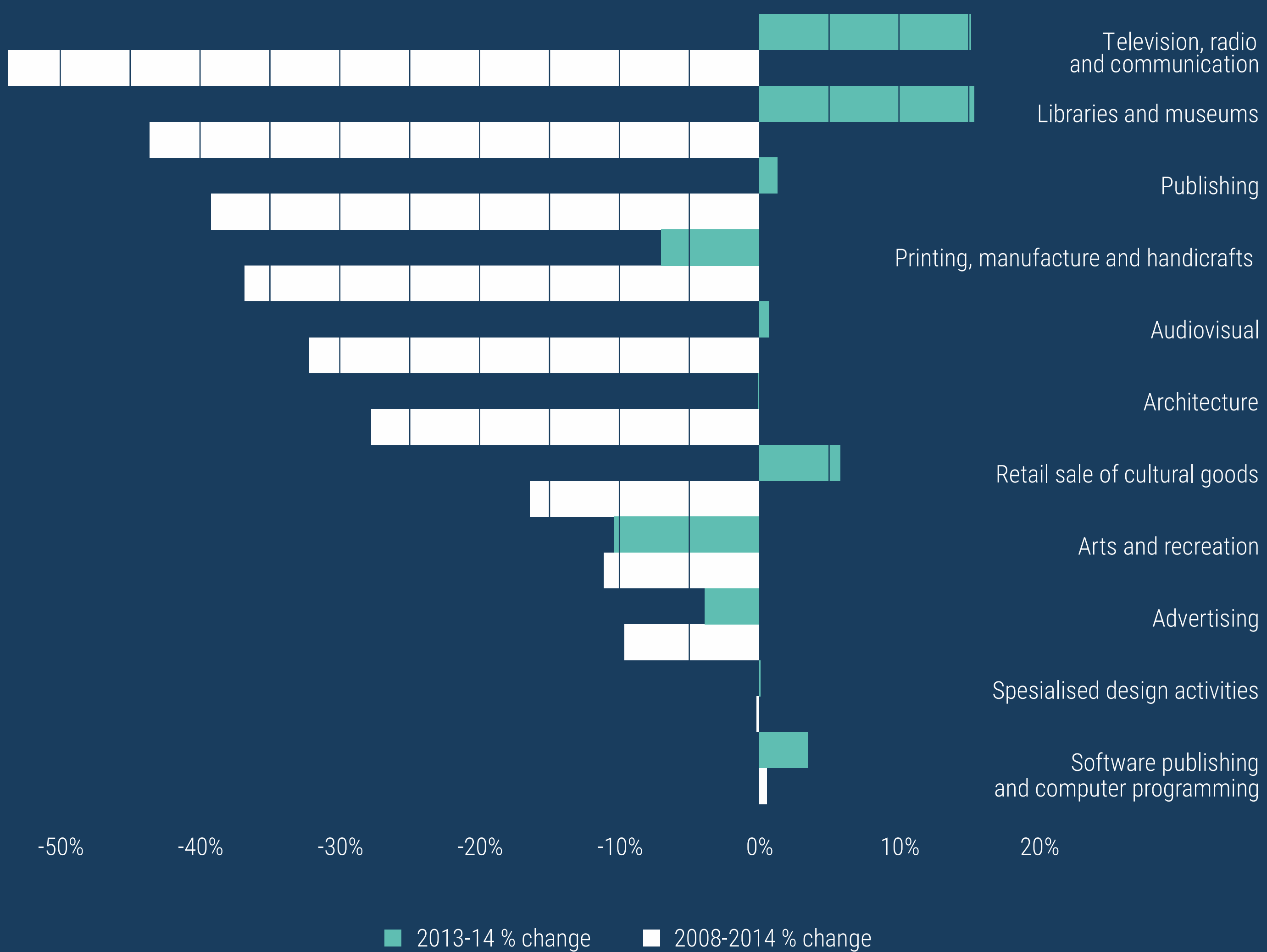
Employees in the cultural and creative sector in Greece amount to 110,688 in 2014, that is to say, about 3.2% of the total employment in Greece. A reduction of about 29.5% is observed starting from 2008, at a time when the number of employees stood at 156,911 persons (at 3.6% of total employment). In the 2013-2014 period, the number of employees shows a slight increase by 0.4%.

Two sectors that appear to have been resilient and maintained employment during the crisis are the software publishing sector, which in the 2008-2014 period increased its employees by 0.5%, and the sector of design, where a slight decrease of only 0.2% was observed. On the contrary, a significant reduction in the number of employees in the 2008-2014 period is observed in television and radio (-53%), libraries and museums (-43.6%) and publishing (-39.2), although in these sectors the highest increase in the number of employees takes place during the 2013-2014 period (15.2%, 15.4% and 1.3% respectively, see Chart 5).

5

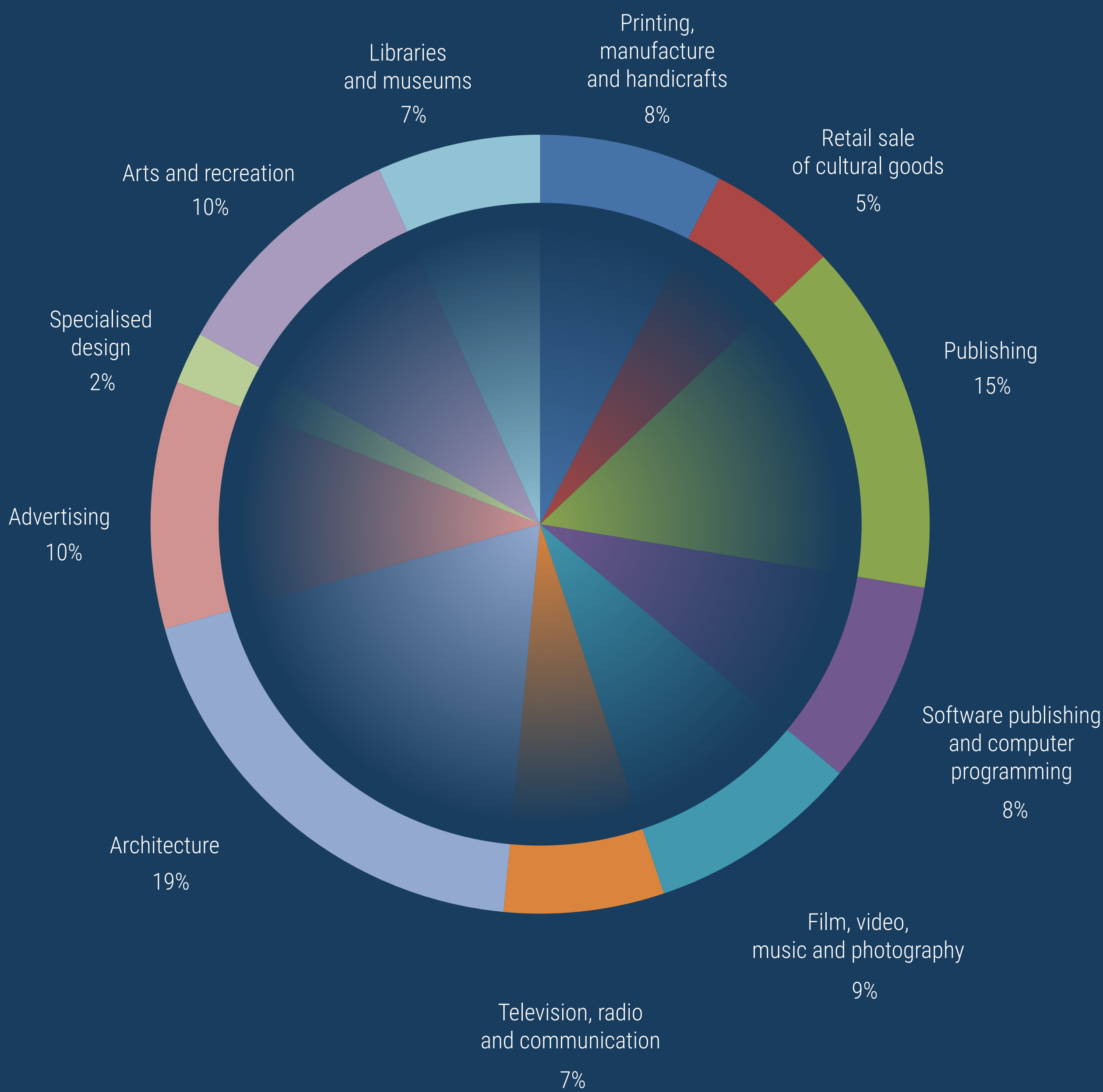
Percentage changes in CCIs' number of employees, Greece, 2008-2014, 2013-2014



Source: Eurostat

Greece ranks 11th in terms of employment and 10th in the number of creative enterprises in EU-28. The sectors with the highest number of employees in 2014 are architecture (21,200 employees), publishing (16,200), advertising (11,300) and arts and recreation (11,200).

6 CCIs' shares in employees' number in Greece, 2014



Source: Eurostat

2 Data on theatre and dance in Greece, 2015

5,000	Actors
1,254	Stage, film, and television directors
375	Playwrights, musicians, and translators
400	Dancers
110	Choreographers
34	Contemporary dance plays
40	Shadow play
400	Opera singers
2,000	Film/stage technicians[1]
684	Drama , dance and music schools
55,142	School students
377	Stages
1,542	Plays for the theatre*

Source: Greek Federation for the Audiovisual and Performance sectors, Greek Directors Guild, Greek Playwrights, Musicians, and Translators Association, Greek Choreographers Union, athinorama.gr
*data refer to Attica only

3 Data on the Greek film productions and cinemas, 2015

31	Number of domestic films and documentaries (2016)
151	Number of domestic film and television programmes production companies (2011)
190	Directors and producers (ESPEK and SAPOE members)
294	Cinemas
[2.7	per 100,000 residents]
495	Silver screens
[4.6	per 100,000 residents]
53	Cinema clubs

Source: Greek Film Centre,
ESPEK (Association of Greek Film Directors and Producers),
SAPOE (Association of Greek Independent Audiovisual Producers)

4 Data on music production in Greece

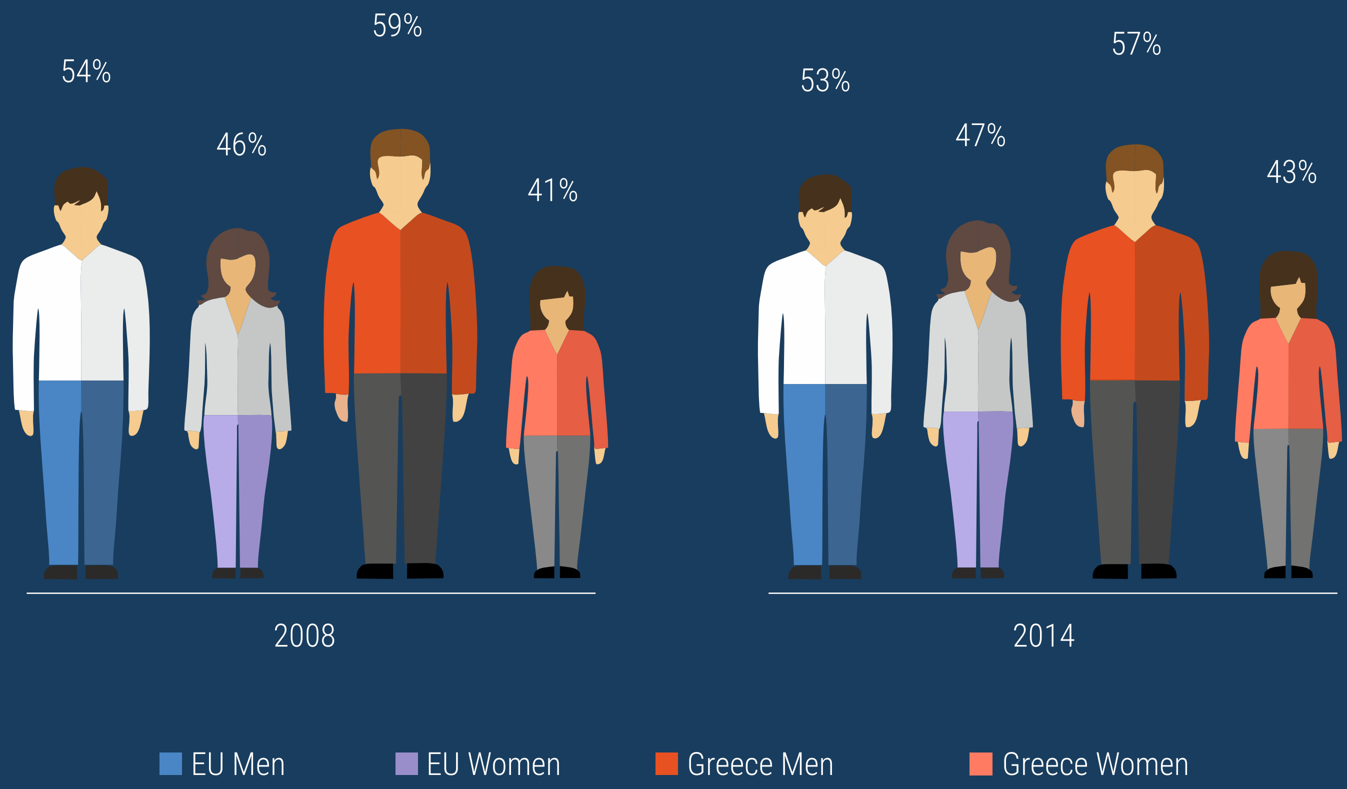
1,734,530	Works of music in AEPI archive, 2014
13,718	Songwriters and composers (AEPI members, 2014)
1,313	Singers (Erato members, 2015)
1,426	Musicians (Apollon members, 2012)
71	Record companies (GRAMMO members, 2015)

[1] Technicians encompass any creative specialisation in the field except for directors (e.g. directors of photography, cameramen, film editors, scenographers, costumiers etc.).

Out of the employees in the cultural and creative sector, as a whole, 57% are men and 43% women. In the 2008-2014 period a slight increase of women employees in the field by 2% is observed and a corresponding decrease of men employees. In the same period, the participation of men and women in CCIs' labour market in EU-28 shows a higher gender parity.

7

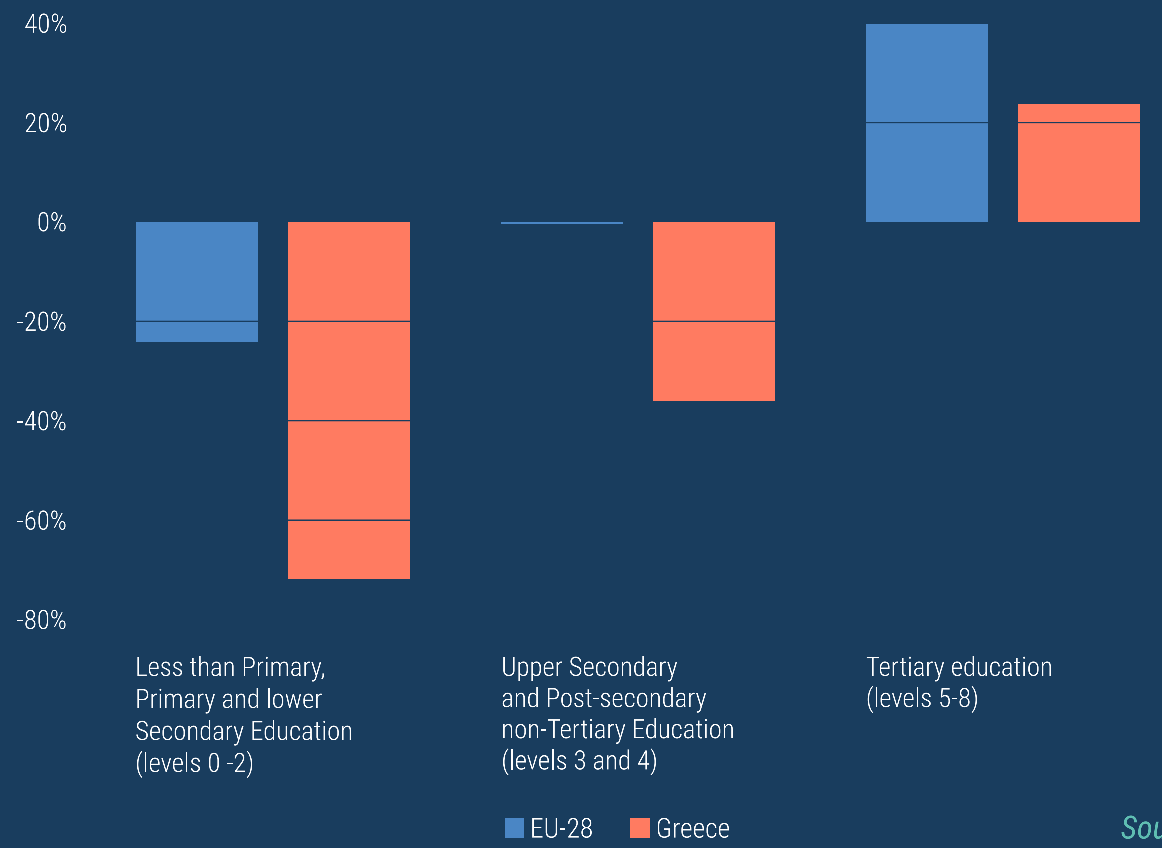
Percentage of employees by gender in the cultural and creative sector in Greece and EU-28, 2008 and 2014



Source: Eurostat

57% of employees in country's cultural and creative sector in 2014 were higher education graduates. In the 2008-2014 period, the aforementioned employees increased by 23.7% (EU-28: 40%), while employees with primary education decreased by 73% (EU-28: -24%), a fact that indicates the increased professionalisation of the wider field of creative labour and possibly the extent to which the latter is viewed as an attractive field of work for a highly educated workforce.

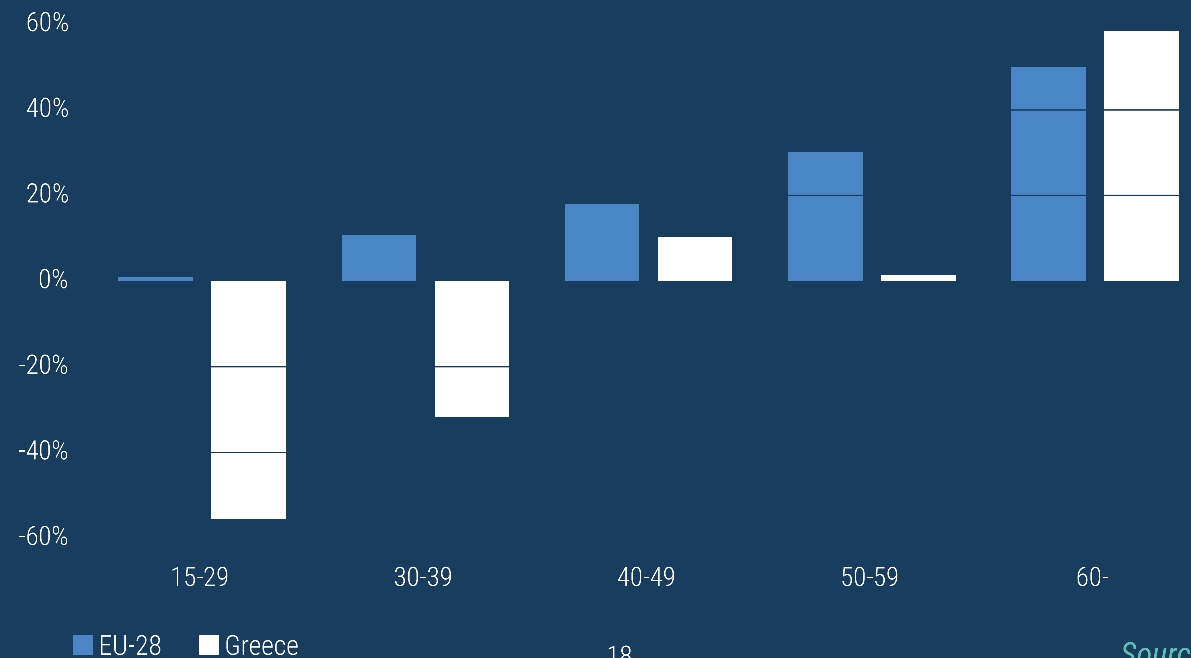
8 Percentage changes in the education attainment level of employees in the cultural and creative sector in Greece and EU-28, 2008-2014



Source: Eurostat

Furthermore, 65% of employees in the cultural and creative sector in Greece are 30-49 years old (2014), while the 15-29 age group experienced a 56% decrease in employment during the economic crisis.

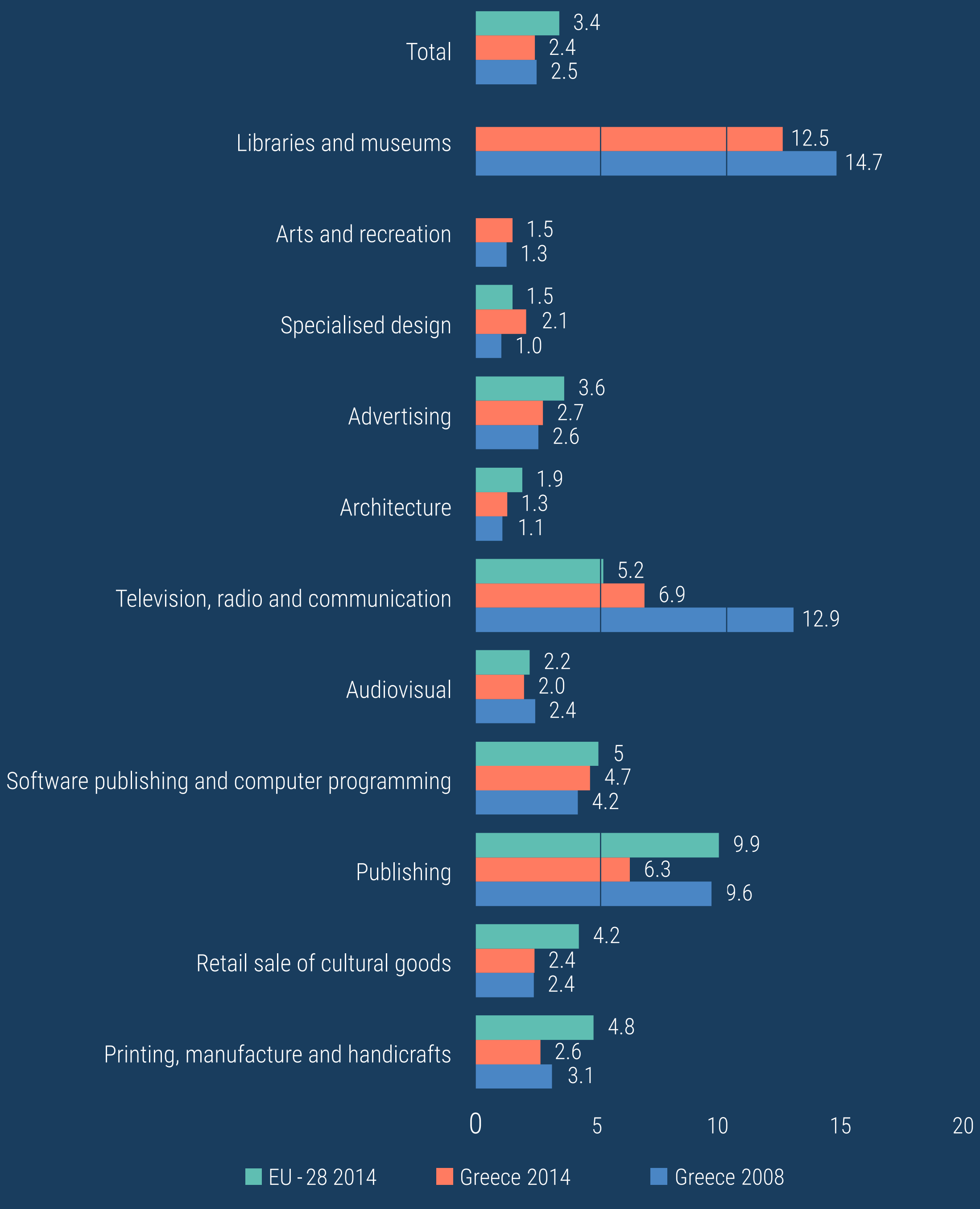
9 Percentage changes in the age groups of CCIs' employees, Greece and EU-28, 2008-2014



Source: Eurostat

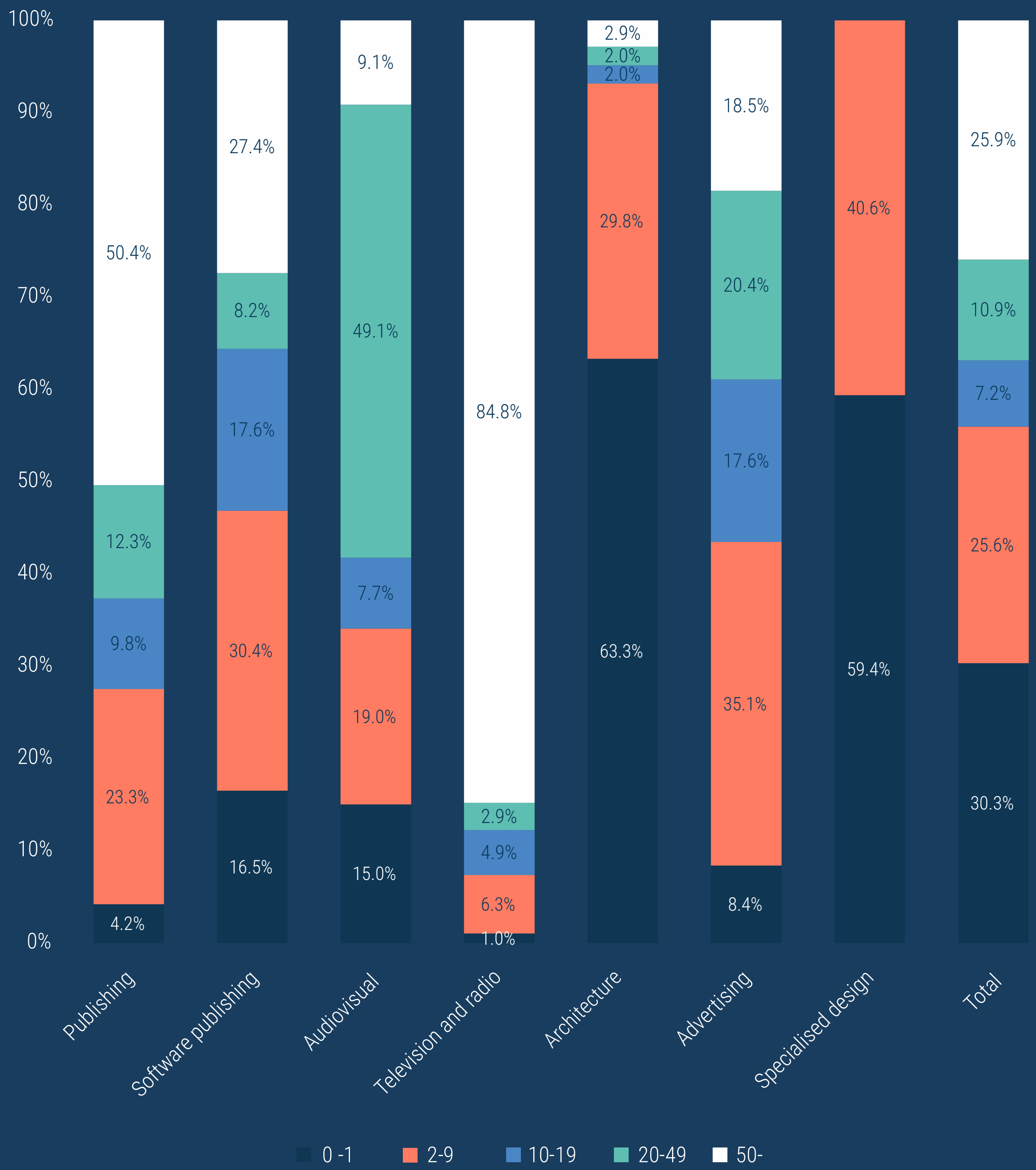
In Greece, 2.4 employees are employed on average in a creative enterprise, while the respective average in EU-28 is 3.4 (2014). More than 71% of the creative enterprises in Greece is either a sole proprietorship or an enterprise with one employee, 25.4% employ two to nine persons, while enterprises with 50 employees and more represent barely 0.6%. Sole proprietorships and enterprises with up to 9 employees produce 55% of CCIs' added value in Greece, while those with more than 50 employees produce 26% of the added value (Chart 11).

10 Average of employees per enterprise, Greece, 2008-2014 and EU-28, 2014

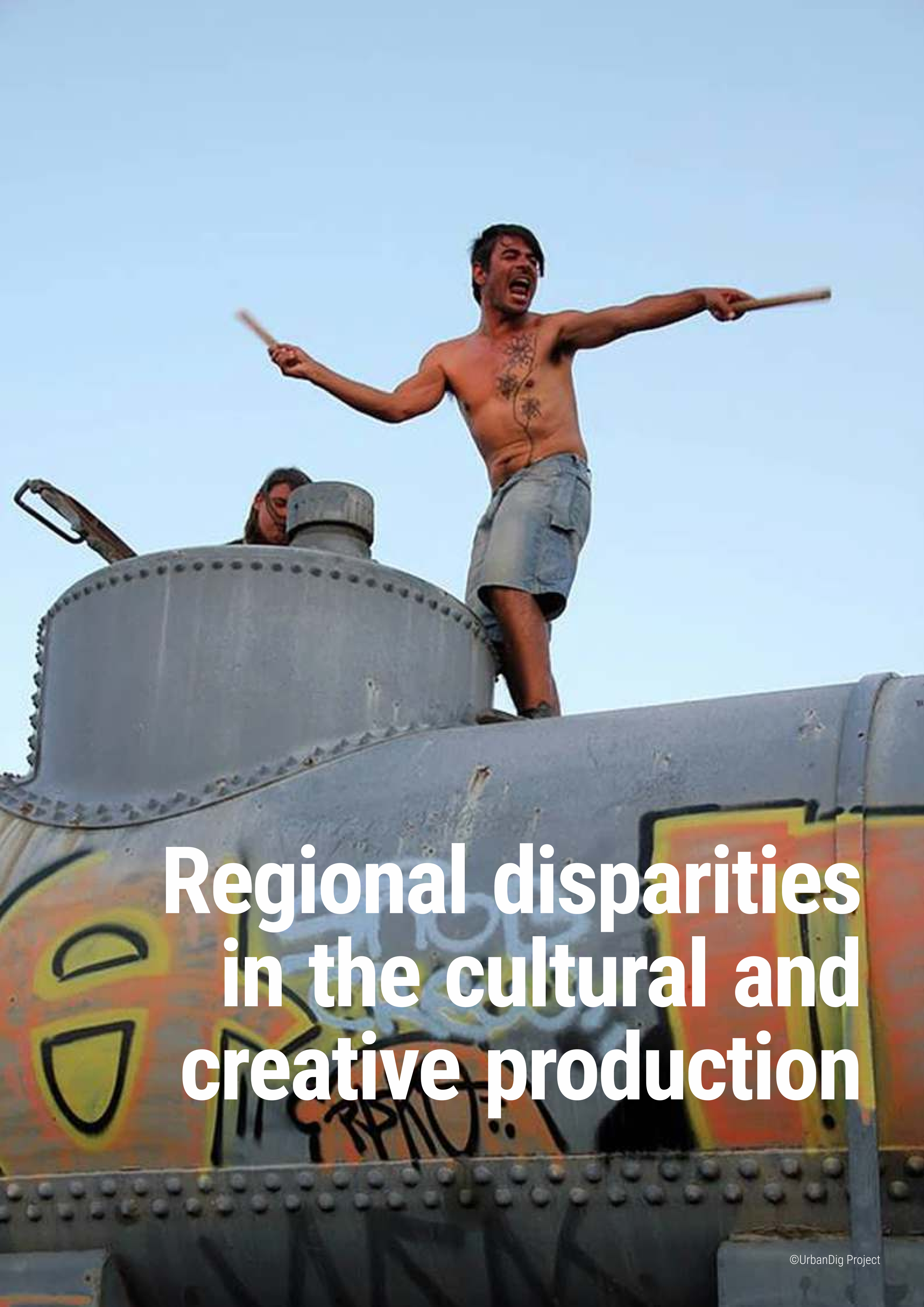


Source: Eurostat, ELSTAT, Ministry of Culture and Sports.
There are not sufficient data on the sectors "Arts and recreation" and "Libraries and museums" for EU-28.

11 Percentage cumulative distribution of added value per creative sector and enterprise size class, Greece, 2014



Source: Eurostat, ELSTAT



Regional disparities in the cultural and creative production

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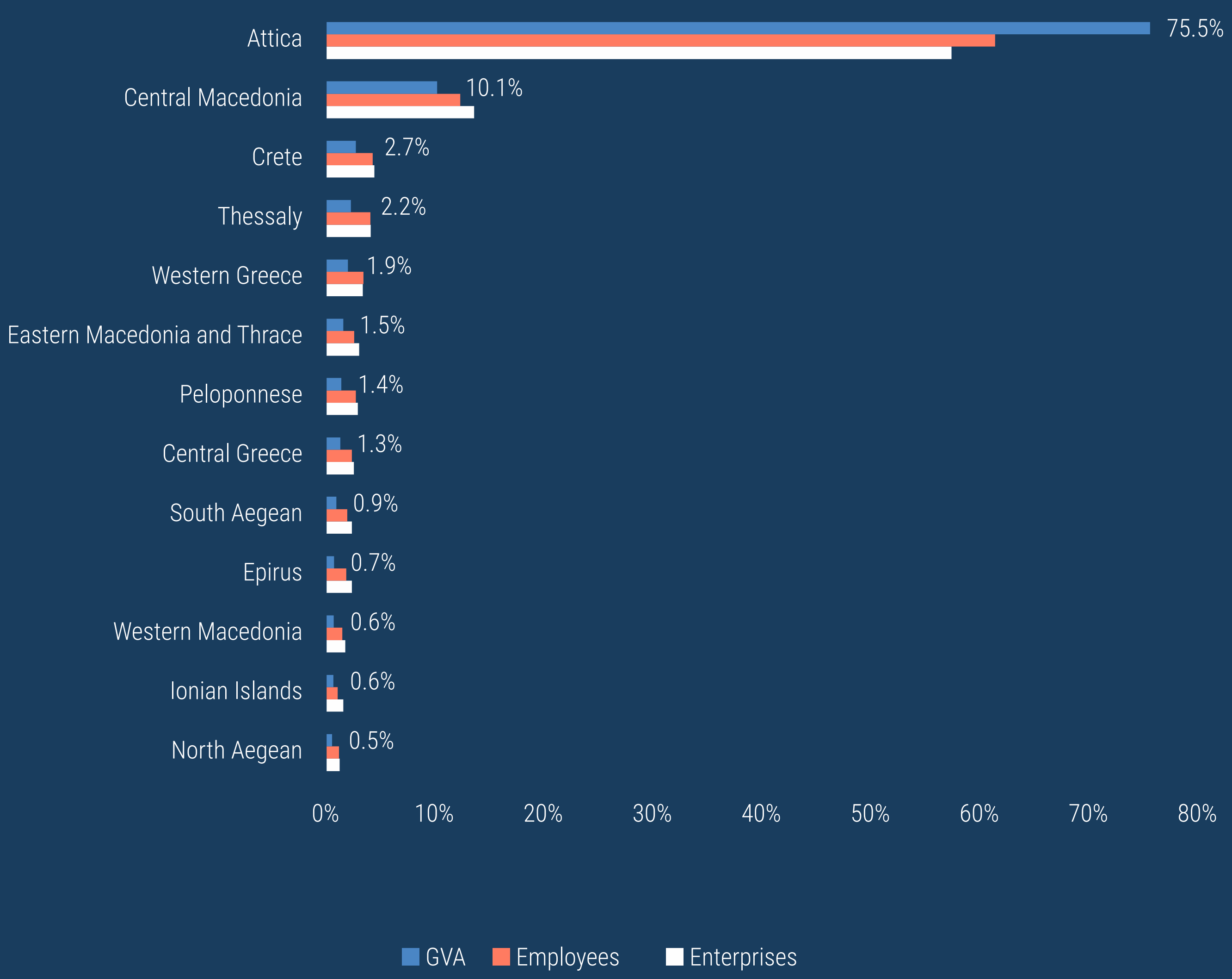
The distribution of cultural and creative production, employment, and number of enterprises, in the 13 Regions of the country, proves to be particularly unbalanced, as shown in Chart 12. The Region of Attica produces 75.5% of the Gross Value Added (GVA) of the CCIs in Greece, with 57.3% of creative enterprises, which employ 60.8% of employees as a whole. Second to the Region of Attica comes the Region of Central Macedonia with a 10.1% share in GVA, 12.2% of employees and 13.5% of enterprises. The remaining 11 Regions share 14.3% of the GVA, 27% of employees, and 29.1% of enterprises. The core-periphery model, which is evident in most sectors of economic activity in Greece, appears to be recurring in the cultural and creative industries even more intensely, to the benefit of the two large urban centres (Athens and Thessaloniki) and at the expense of the periphery.

12 Regions' Shares in CCIs' GVA, number of employees and enterprises, 2014

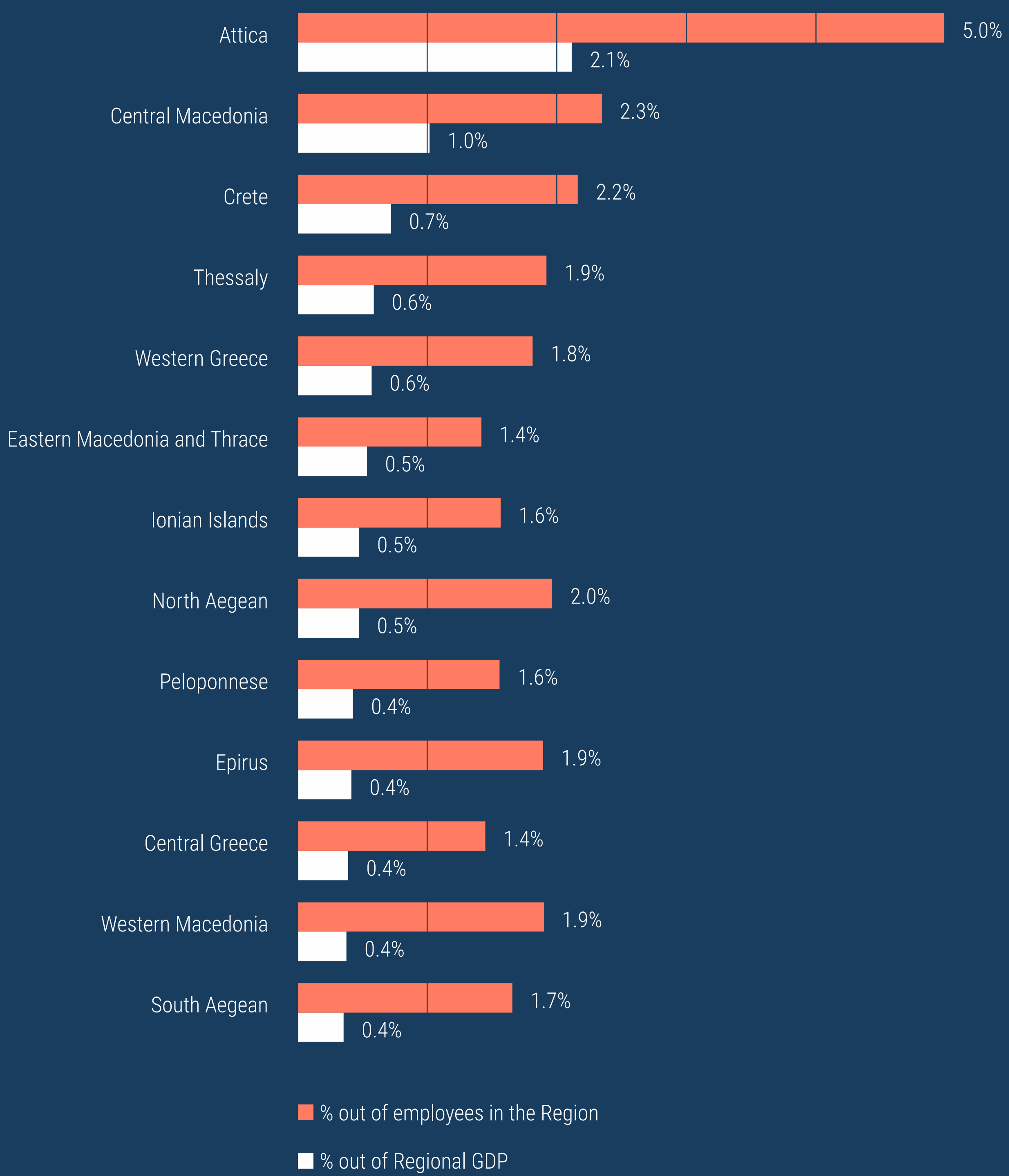


Source: Eurostat, ELSTAT

With regard to the Region of Attica in particular, the cultural and creative industries play an important role in the regional economy, as they employ 2.1% of employees in the region and contribute a 5% to the regional GDP, while in the other regions of Greece employment fluctuates between 1.4% and 2.3% and the contribution to the regional GDP varies between 0.4% and 1%.

13

CCIs' shares in employment and gross value added in the 13 Regions of Greece, 2014

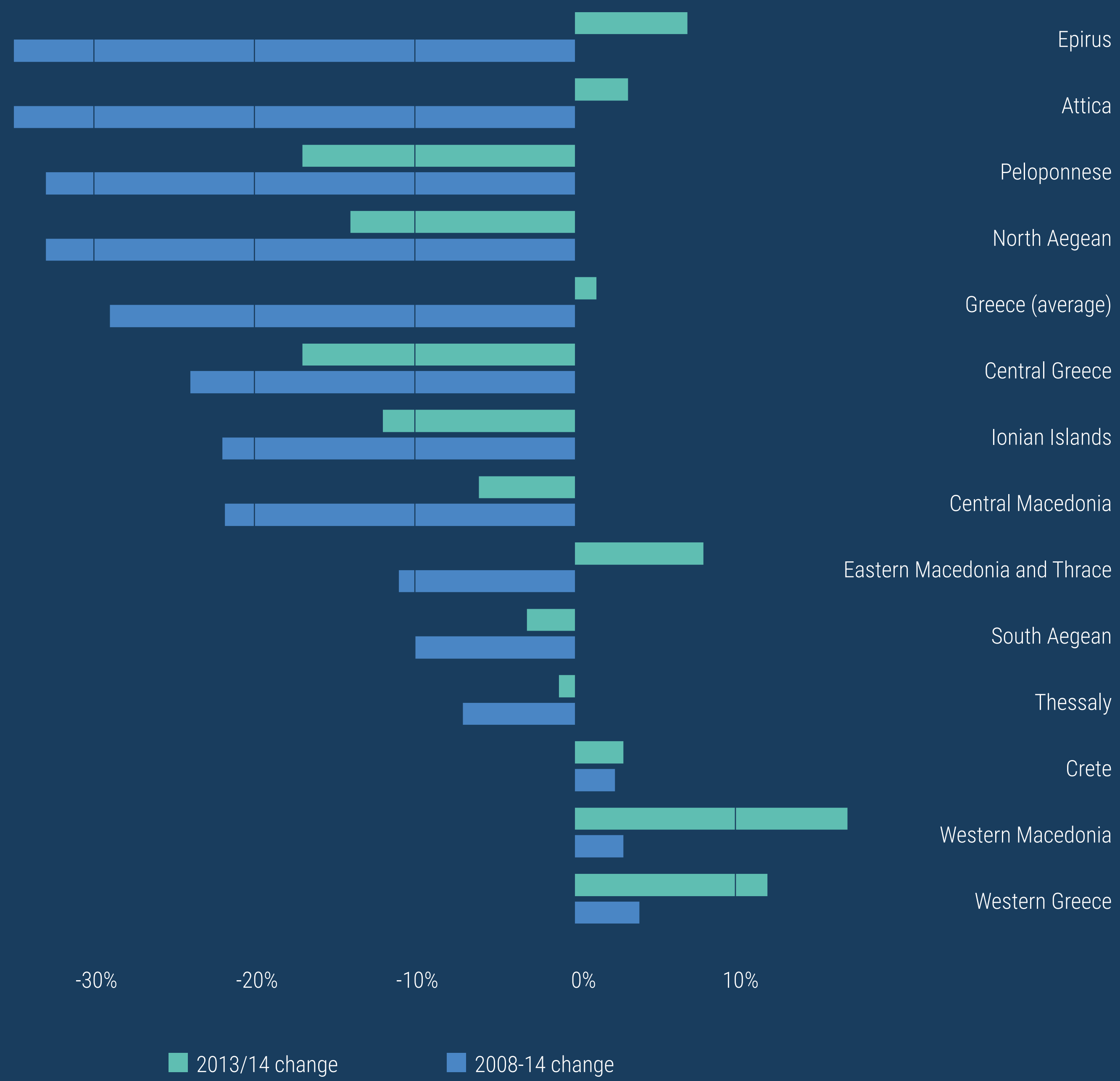


Source: Eurostat, ELSTAT

The Regions worst hit by the economic crisis were Epirus, Attica, Peloponnese, and North Aegean, while the Regions of Western Macedonia, Western Greece, and Crete were particularly resilient, as they have increased employment figures during the 2008-2014 period, while in the 2013-2014 period the Regions of Western Macedonia and Western Greece recorded increase in the number of employees by more than 10%. Moreover, it is encouraging that employment was boosted in Attica by 3% in 2014, recovering this way from the constant downfall during the last six years.

14

Percentage changes in CCIs' number of employees in the 13 Regions of Greece, 2008-2013-2014



Source: Eurostat, ELSTAT

Furthermore, intense regional disparities are observed in cultural structures and infrastructure, such as in the number of festivals and libraries (per 100,000 residents): in the Region of South Aegean 16.2 festivals per 100,000 residents are organised annually, while in the Region of Epirus there are barely 2.1 festivals.

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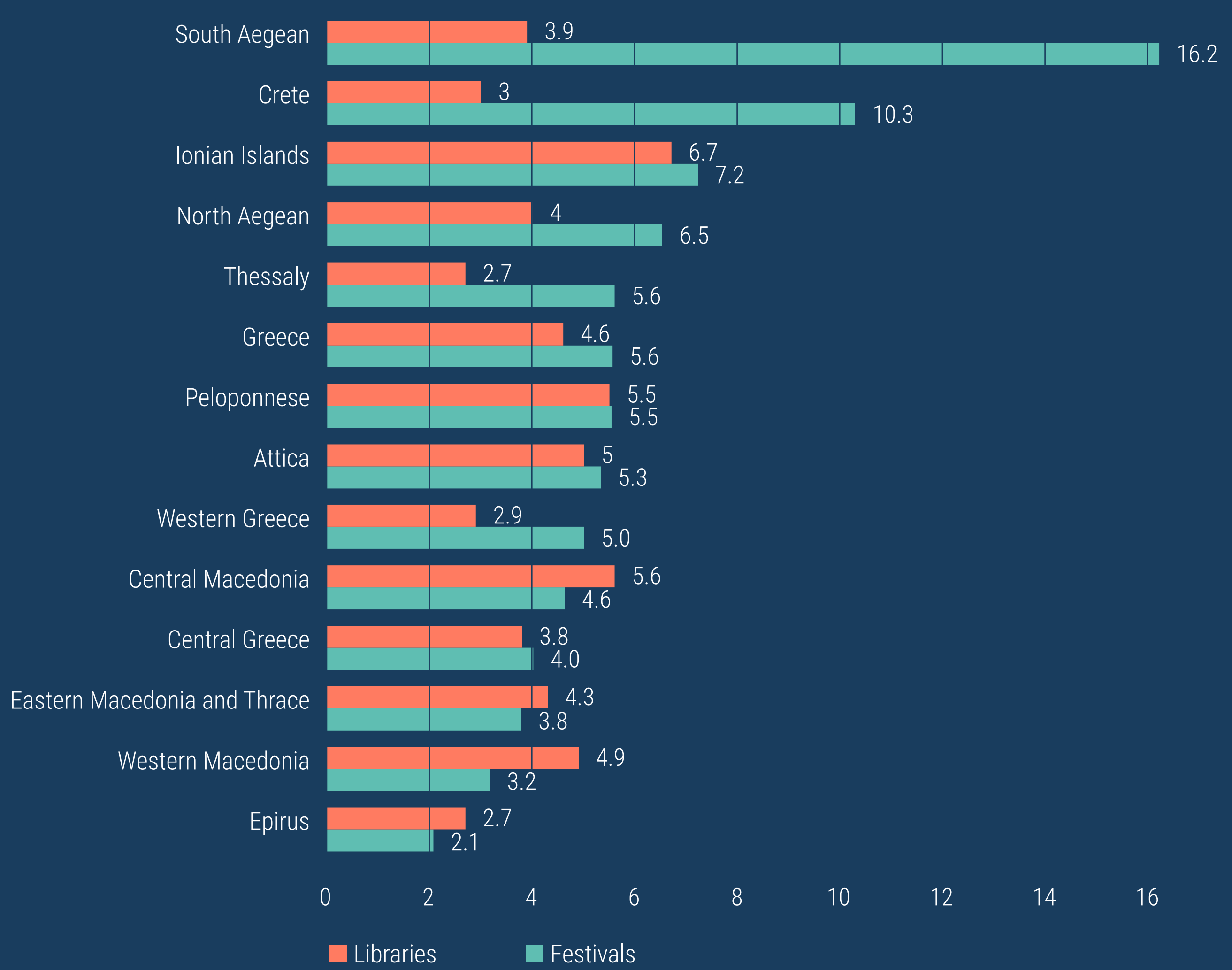
Number of festivals and libraries, per 100,000 residents, 2015



Source: Eurostat, ELSTAT

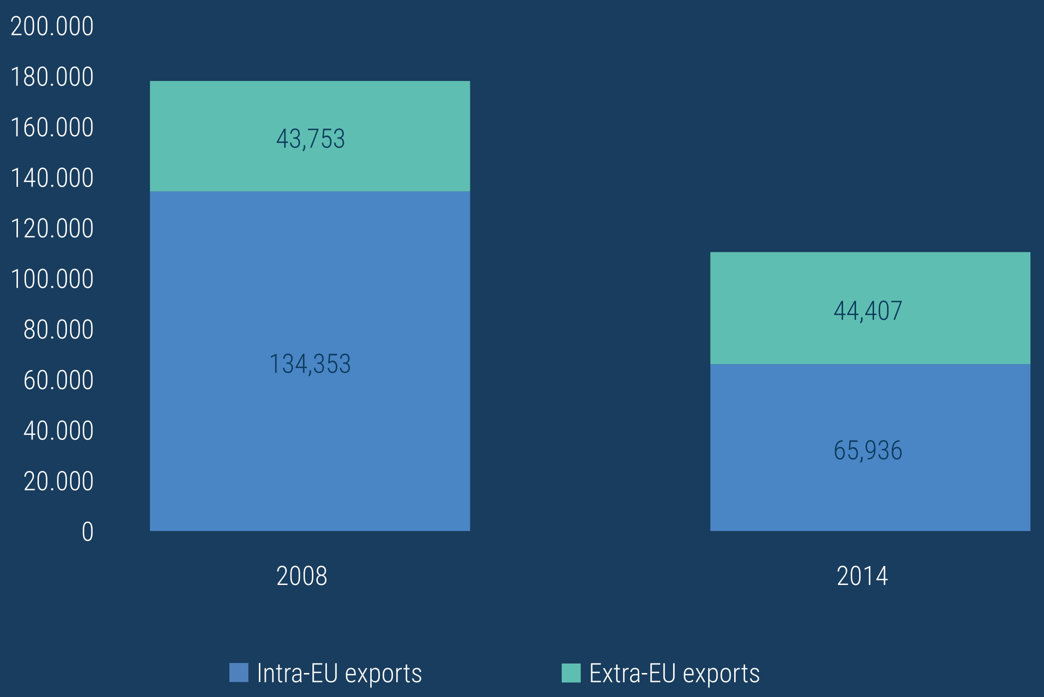
International trade in cultural goods and cultural participation

© Art Athina

Greece is a net cultural goods-importing country, as it imports goods amounting to € 181 mn (mainly films, video games and consoles) and it exports goods amounting to € 110 mn (mainly books, knitted goods, textiles, needlework, and audio recording media), in 2014. However, during the 2008-2014 period, imports reduced by 51.2%, while exports decreased by 38%. Greece ranks 10th (in EU-28) regarding intra-EU exports and 16th in exports to non-EU countries.

16

Intra-EU and Extra-EU exports from Greece, 2008 and 2014 (in € thousands)



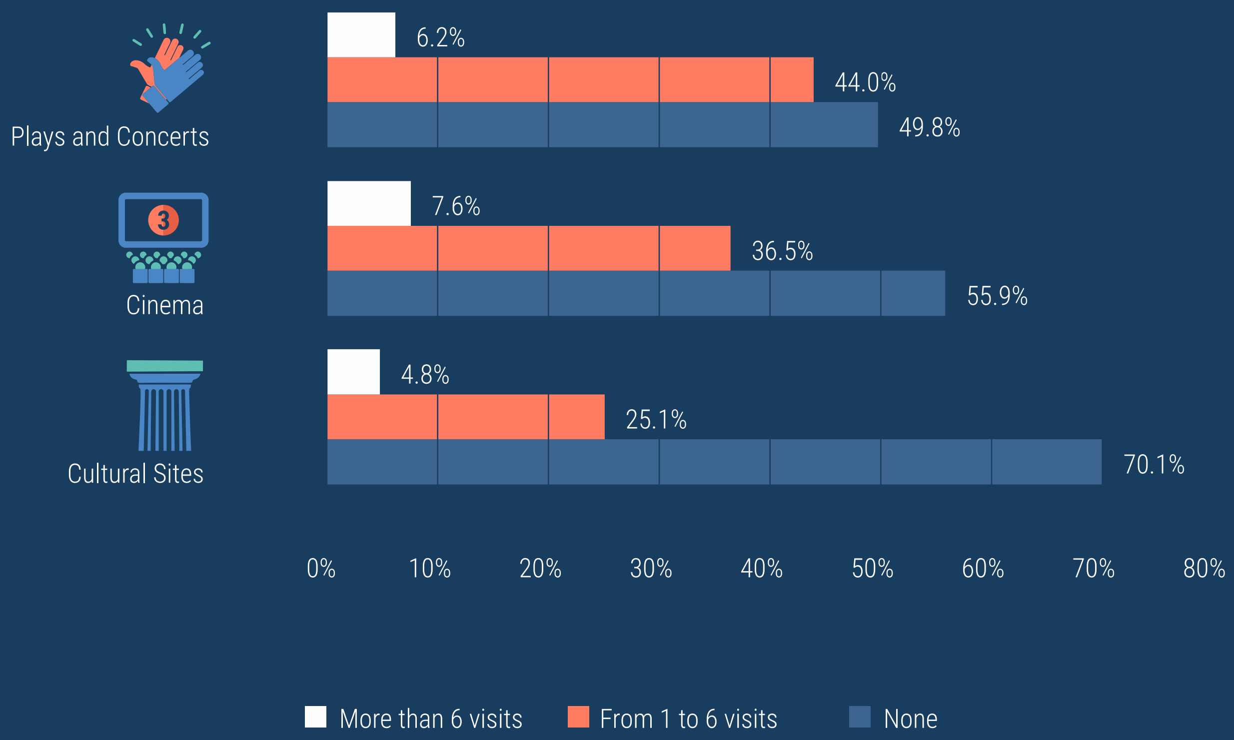
Source: Eurostat, ELSTAT

With regard to cultural consumption, as this manifests itself through going to the cinema, attending plays and concerts, and visits to cultural sites, Eurostat data indicate that in 2011 a significant figure of respondents, in both Greece and EU, are not participating in cultural activities, at least to the extent that these are captured in the aforementioned activities.

* In collecting the relevant cultural statistics Eurostat defines cultural sites as historical monuments, museums, art galleries, and archaeological sites.

17

Frequency of visiting cultural sites, cinemas, attending plays and concerts in Greece, 2007 and 2011

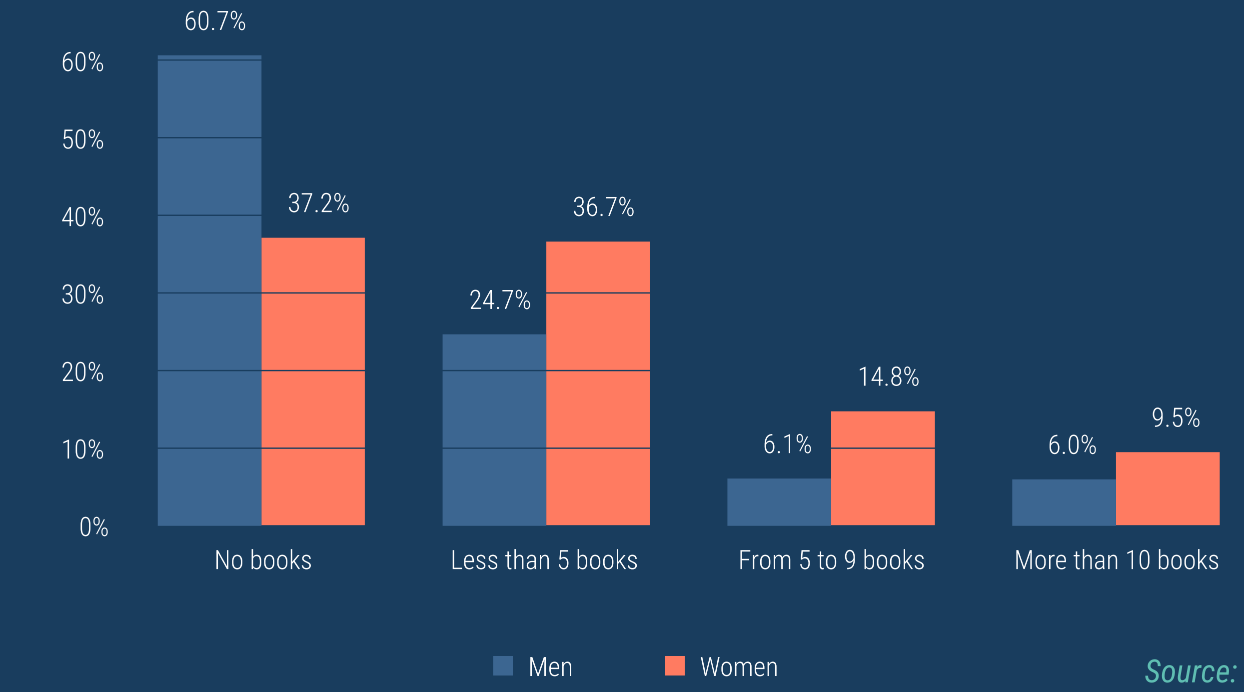


Source: Eurostat

The higher the educational attainment of the public, the higher the frequency of visiting cultural sites, cinemas, attending plays and concerts, and the higher the frequency of reading books and newspapers as well. By way of illustration, 69% of respondents with higher education degrees have reported visiting the cinema at least once in the last year, while only 18% of respondents with primary education have done so. The older the age of the respondents, the higher the probability of being totally inactive in consuming cinema, plays, and concerts. A relative gender differentiation appears in the frequency of visiting cinema, attending plays and concerts, and visiting cultural sites, as fewer women tend to belong to inactive consumer groups in all three cases.

Regarding the frequency of reading books, Greece lags behind compared to the European average based on the Eurostat data (2011). The frequency of reading books is directly linked to the educational attainment of respondents, with the frequency of reading books increasing as the educational capital increases, while the older the age of the respondents, the higher the probability of being totally inactive readers. Moreover, women read more and in a more systematic way than men do.

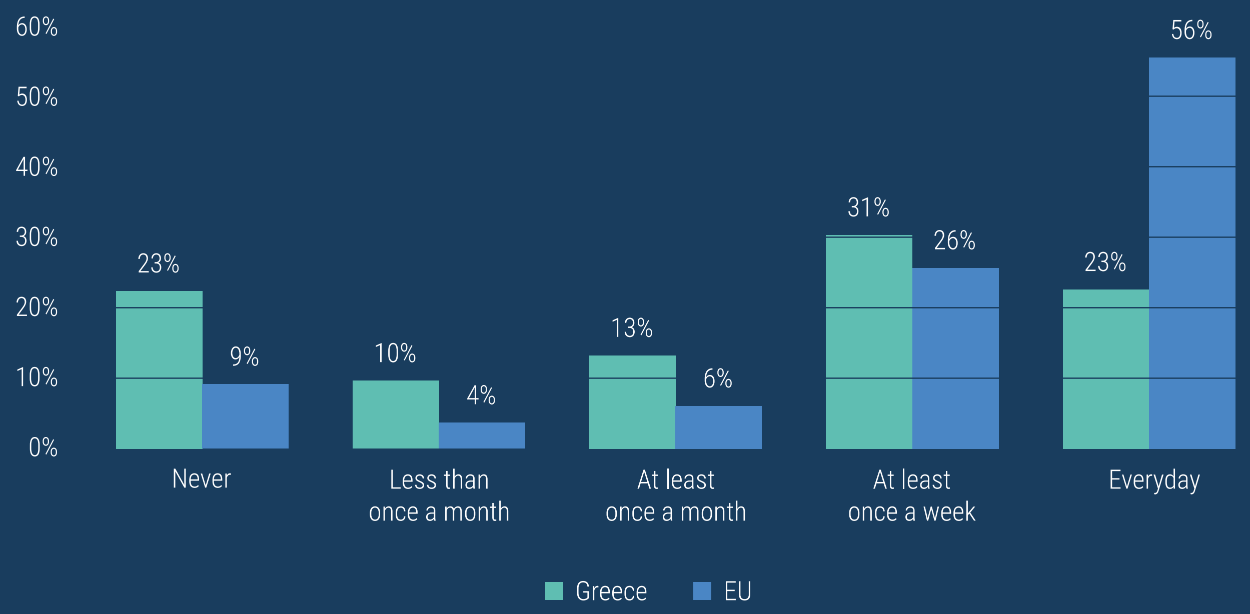
18 Frequency of reading books by gender, Greece 2011



Source: Eurostat

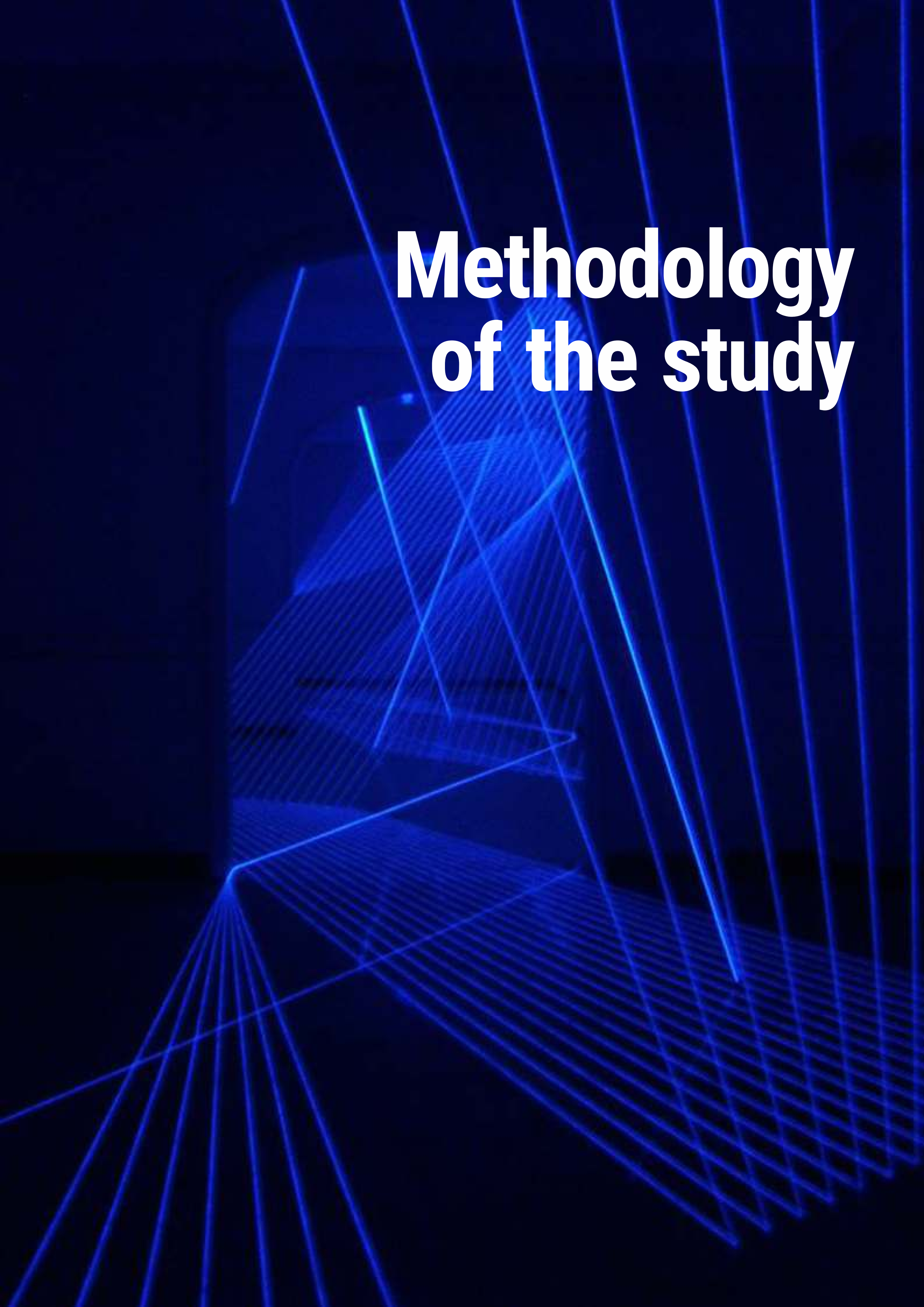
The figure of people in Greece reading on a daily basis newspapers is low as well (23%), compared to the respective European figure (56%), while the average consumption expenditure per household in Greece for specific cultural goods (buying newspapers and periodicals, books, tickets for the cinema, plays and concerts, stationery and equipment for the reproduction of sound and vision) is higher than the respective expenditure in the EU. On the contrary, the ranking of Greece in purchasing films and music online is very low in EU-28.

19 Frequency of reading newspapers, Greece and EU, 2011



Source: Eurostat

Methodology of the study



The methodology for carrying out the study was based on quantitative scale methods of statistical data analysis, which have been drawn from various sources, such as the Statistical Office of the European Union (Eurostat, Data the Structural Business Statistics and Labour Force Survey database), the Hellenic Statistical Authority (GDP and Employment data, Business Registry, Input – Output Tables, Cultural Statistics) and the Ministry of Culture and Sports, and statistics from a series of state and private bodies and representative organisations as well, in order to gain a more comprehensive view of the various cultural sectors.

An important issue that researchers are still working on is the selection of CCIs that are included in the relevant European and national studies mapping the cultural and creative economy. The Greek study was based on the classification produced in 2012 by the ESSNet-Culture team on behalf of the European Commission, which now comprises for Eurostat the 'official' statistical classification of cultural and creative sectors, without however the latter been always followed in the relevant mapping studies of the EU-28 Member States. The mapping of the economy of the Greek cultural and creative production, labour etc., includes a higher percentage of activities of some of the sectors (codes) than were deemed necessary in the initial ESSNet-Culture classification (see Table 5). The main reason for this choice was that the addition of these sectors create a more complete framework for delivering a more comprehensive view of the economy of cultural and creative industries in Greece.

Keeping registries and records in a more comprehensive and systematic way by the bodies, unions, and organisations involved in the field comprises an essential step towards a thorough evidence-based design of policies and actions on cultural and creative industries in the future.

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5

Statistical classification of the study sectors, compared to the ESSNet-Culture classification

STAKOD	Culture and Creativity Sectors	Significance for the study	ESSNet_ Culture
	Printing, manufacture and handicrafts		
1812	Other printing activities	50%	not included
1813	Pre-press and pre-media services	50%	not included
1814	Binding and related activities	50%	not included
1820	Reproduction of recorded media	50%	not included
3212	Manufacture of jewellery and related articles	100%	not included
3213	Manufacture of imitation jewellery and related articles	50%	not included
3220	Manufacture of musical instruments	100%	not included
3240	Manufacture of games and toys	50%	not included
	Retail sale of cultural goods		
4761	Retail sale of books in specialised stores	50%	not included
4763	Retail sale of music and video recordings in specialised stores	50%	not included
7722	Renting of video tapes and disks	50%	not included
	Publishing		
5811	Book publishing	100%	included in whole
5813	Publishing of newspapers	100%	included in whole
5814	Publishing of journals and periodicals	100%	included in whole
5819	Other publishing activities	100%	not included
	Software publishing and computer programming		
5821	Publishing of computer games	100%	included in whole
5829	Other software publishing	100%	not included
6201	Computer programming activities	50%	not included
	Audiovisual		
5911	Motion picture, video and television programme production activities	100%	included in whole
5912	Motion picture, video and television programme post-production activities	100%	included in whole
5913	Motion picture, video and television programme distribution activities	100%	included in whole
5914	Motion picture projection activities	100%	included in whole
5920	Sound recording and music publishing	100%	included in whole
7420	Photographic activities	100%	partly included
	Television, radio, and communication		
6020	Television programming and broadcasting	100%	included in whole
6201	Computer programming activities	100%	included in whole
6312	Web portals	100%	included in whole
6391	News agency activities	100%	included in whole
	Architecture		
7111	Architectural activities	100%	included in whole
	Advertising		
7311	Advertising agencies	100%	partly included
	Specialised design		
7410	Specialised design activities	100%	included in whole
	Arts and recreation		
90	Creative activities, arts and recreation	100%	included in whole
	Libraries and museums		
91	Libraries, archives, museums and other cultural activities	100%	included in whole

Project team

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The aim of the study is to analyse in detail the development of key economic figures in the cultural and creative industries (CCIs) in Greece during the 2008 – 2014 period, in order to have for the first time a description of the cultural and creative economy, on a national, sectoral and spatial level. We hope that the present mapping will comprise a substantial input to policy planners for the creative sector in Greece, at the national and regional/local level. This booklet contains a synopsis of the study.

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