

Cultural and creative industries in 2019

30.03.2021

 **3.6%**

The increase in the number of enterprises belonging to the cultural and creative industries as compared with 2018

In 2019 121.5 thousand enterprises belonging to the cultural and creative industries carried out the activity. The overwhelming majority of entities (99.0%) were microenterprises, comprising 72.7% of those working in the area of cultural and creative industries. Gross monthly salary per employee amounted to 6,458 PLN and was higher by 1,290 PLN in comparison with all non-financial enterprises. The foreign trade in cultural and creative goods and services was characterised by a positive turnover balance.

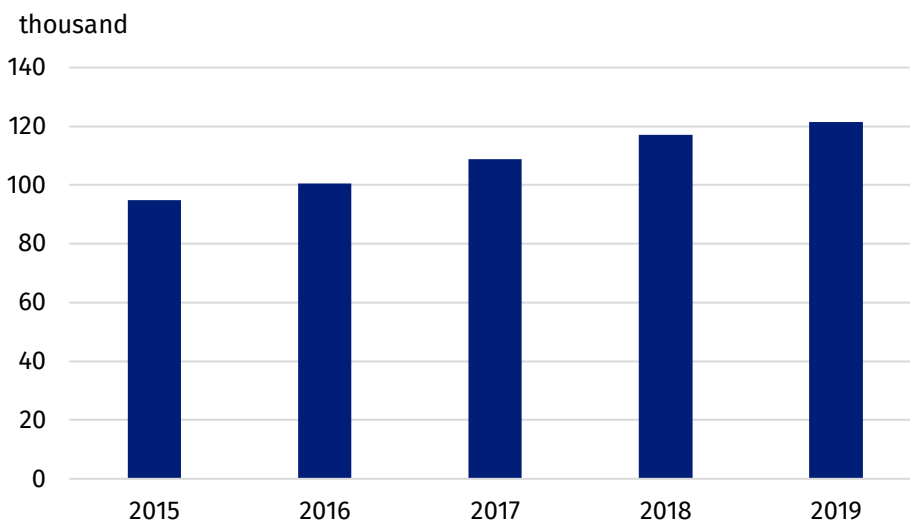
The number and types of enterprises belonging to the cultural and creative industries

In recent years, the number of enterprises which activities are classified as cultural and creative industries has been growing systematically. In 2019, it reached the level of 121.5 thousands entities operating in various fields of broadly understood culture. The most represented domains of culture in 2019 were: *Visual arts* (28.7 thousand entities) followed by *Audiovisual arts and multimedia* (20.4 thousand entities) and *Books and press* (19.9 thousand entities).

As compared to 2018, the highest rise in the number of operating enterprises was observed in the domain *Visual arts* (by 8.6 percentage points). A relatively major increase was also seen among enterprises pertaining to *Audiovisual arts and multimedia* domains (by 4.0 percentage points). By contrast, the sharpest decrease was recorded in the domain *Books and the press* (by 6.7 percentage points).

The largest number of enterprises belonging to the cultural and creative industries operated in the domain of *Visual arts* (23.6%)

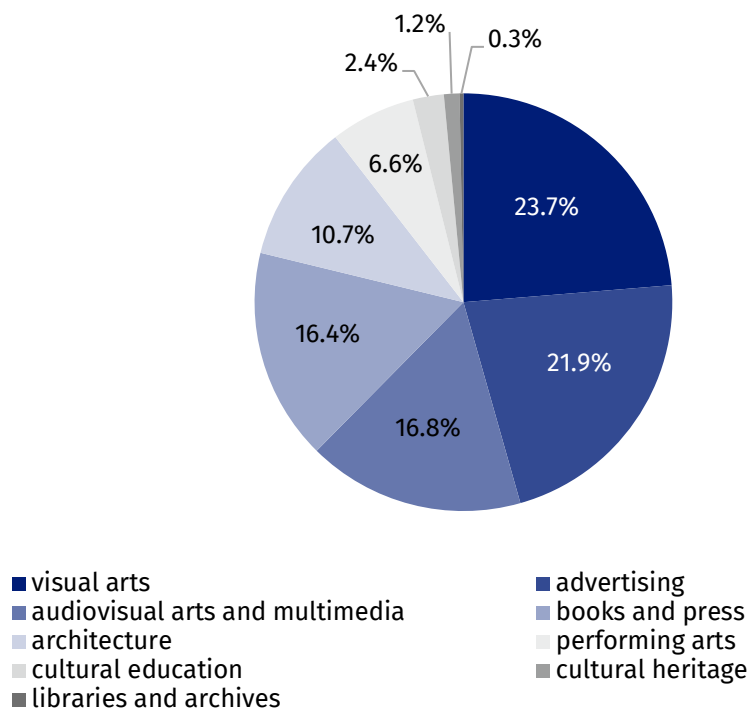
Chart 1. Number of enterprises belonging to the cultural and creative industries



The majority of the entities were organised in the form of microenterprises (99% of all entities classified as cultural and creative industries). In total, in 2019 there were 120.3 thousand of them, which accounted for 5.6% of all non-financial microenterprises. In the

remaining enterprise size classes, the share of cultural and creative industries in the group of non-financial enterprises was as follows: small – 1.9%, medium – 1.2%, large – 1.2%.

Chart 2. The structure of entities belonging to the cultural and creative industries by domain of culture in 2019



The most of the entities classified as cultural and creative industries were microenterprises. They accounted for 5.6% of all non-financial microenterprises

Employed persons, average employment and salaries

As of 31st of December 2019, 237.7 thousand employees worked in enterprises belonging to the cultural and creative industries (3.8 thousand people less than in 2018), which accounted for 2.4% of the total number of employees in non-financial enterprises. 72.7% of employed persons were employed in microenterprises, 12.0% – in large enterprises, 7.9% – in small enterprises and 7.3% – in medium enterprises. Analysis of average employment showed that the employment structure was slightly more balanced: microenterprises – 38.7 thousand (38.8%), large enterprises – 27.3 thousand (27.3%), small – 17.5 thousand (17.5%), and medium – 16.4 thousand (16.4%).

Enterprises belonging to the cultural and creative industries, irrespective of the size class, were characterised by the higher gross monthly salary per employee than in all non-financial enterprises. In 2019, the gross monthly salary per employee in all non-financial enterprises amounted to 5,168 PLN, while in the cultural and creative industries 6,458 PLN (429 PLN more than a year before).

In microenterprises classified as cultural and creative industries, the monthly gross salary per employee was 3,788 PLN compared to 3,373 PLN in all non-financial microenterprises. Similar differences were seen in the remaining size classes of enterprises: small entities – 6,925 PLN versus 4,769 PLN; medium – 8,100 PLN versus 5,382 PLN, large enterprises – 8,962 PLN versus 6,048 PLN. The share of gross wages and salaries in total costs in the case of enterprises belonging to the cultural and creative industries amounted to 10.5% (8.9% for non-financial enterprises).

Compared to 2018, there is a visible increase in gross monthly salary per 1 employee in the cultural and creative industries in each size class of enterprises. In microenterprises, this increase amounted to 218 PLN, in small enterprises – 886 PLN, in medium enterprises – 106

The enterprises classified as cultural and creative industries had a higher gross monthly salary per 1 employee than non-financial enterprises in total

PLN, and in large enterprises – 1,157 PLN. In the case of small and large enterprises, it was an increase of almost 15.0%, while in microenterprises the increase was 6.1%.

Table 1. Employed persons, average paid employment, gross wages, and salaries in the cultural and creative industries in 2019

SPECIFICATION	Number of persons employed	Average paid employment	Gross wages and salaries in thousands PLN	Monthly gross wages and salary per 1 paid employee in PLN
TOTAL	237,693	99,909	7,742,868	6,458
Microenterprises	172,789	38,738	1,761,121	3,788
Small enterprises	18,857	17,496	1,454,008	6,925
Medium enterprises	17,438	16,370	1,591,209	8,100
Large enterprises	28,609	27,305	2,936,530	8,962

a As of December 31

Financial results

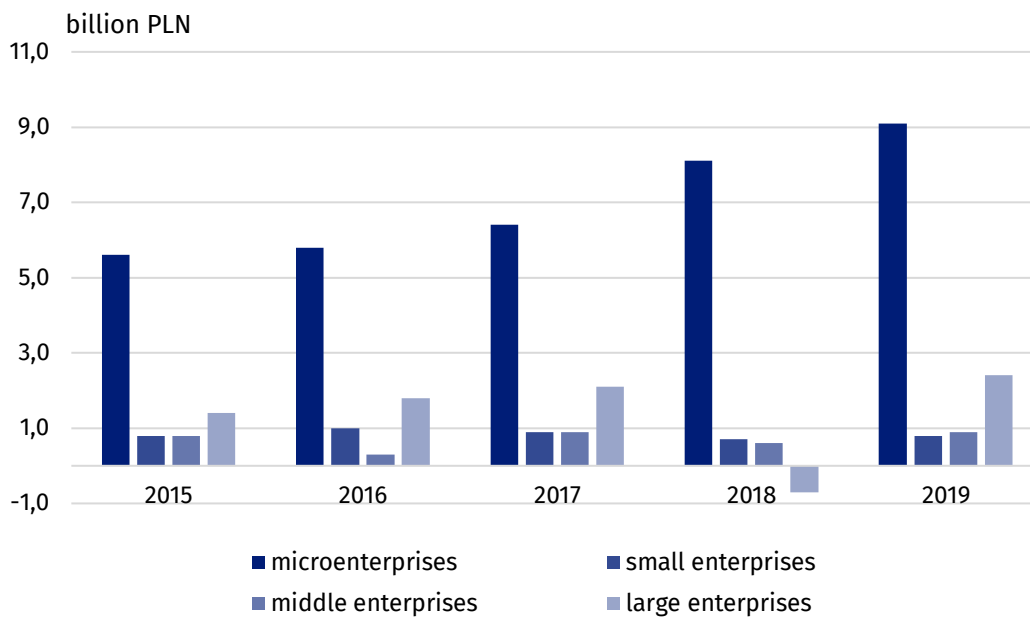
In 2019, entities classified to the cultural and creative industries generated revenues of 86.6 billion PLN, with total costs of 73.4 billion PLN (compared to the results for 2018, there was an increase of total revenue of 3.2 billion PLN and a decrease in total costs of 1.2 billion PLN). Therefore, as in previous years, the surplus of total revenues over total costs was recorded. The cost level indicator (ratio of total costs to total revenues) for all enterprises belonging to the cultural and creative industries amounted to 84.8%, which compared to the indicator for all non-financial enterprises is lower by 8.3 percentage points – cultural and creative activities were, therefore, less cost-intensive.

Total costs per 1 entity belonging to cultural and creative industries amounted to 604.2 thousand PLN (compared to 2,214.6 thousand PLN for all non-financial enterprises), while revenues – 712.9 thousand PLN (compared to 2,379.5 thousand PLN).

The share of both total revenues and total costs generated by enterprises belonging to cultural and creative industries in total revenues and total costs achieved by all non-financial enterprises was less than 2.0% (1.6% and 1.5%, respectively).

In 2019, enterprises classified as cultural and creative industries generated the value added of 26.9 billion PLN (2.3 billion PLN more than the year before), which represented 2.1% of the value added generated by all non-financial enterprises in the year under review. Calculated per enterprise, the total value added of cultural and creative industries was 2.6 times lower compared to the value added for all non-financial enterprises.

Chart 3. The surplus of total revenues over total costs in enterprises belonging to the cultural and creative industries by enterprise size class



The surplus of total revenue over total cost for entities belonging to the cultural and creative industries amounted to 13.2 billion PLN

Foreign trade in cultural and creative goods and services

In 2019, cultural and creative goods worth 15,213.0 million PLN, 0.4% more than in 2018, were sold abroad. In contrast, a decrease in the import of cultural and creative goods was observed – in 2019, cultural and creative goods worth 10,040.5 million PLN were imported to Poland (a decrease by 5.4% compared to 2018). The balance of trade in cultural and creative goods in 2019 was positive and amounted to 5,172.6 million PLN (4,541.4 million PLN in 2018). This amount confirms the growing positive trend in trade in cultural and creative goods observed in recent years.

In 2019, a positive balance of foreign trade in cultural and creative goods was recorded, amounting to 5,172.6 million PLN

Considering the domains of culture, the highest values of both the export and import of cultural and creative goods were recorded in two domains: *Audiovisual arts and multimedia* (import – 7,181.9 million PLN, export – 7,010.6 million PLN) – most of the turnover was generated by trade in video game consoles and devices as well as recorded optical discs, including DVDs. *Books and press* (that included i.a. trade in books, newspapers, dailies, and magazines) came second, presenting the highest positive balance of foreign trade in cultural and created goods (4,401.8 million PLN). *Advertising* (commercial catalogues, other commercial advertisements) was third with the value of export 5.5 times higher than the value of import. Large surplus of exports were recorded also in the domains of *Books and press* (197.9%), *Architecture* (149.6%), and *Visual arts* (63.0%). Negative trade balance was recorded in the domains of: *Audiovisual arts and multimedia* (- 171.2 million PLN), *Performing arts* (-105.1 million PLN), *Cultural heritage* (-42.5 million PLN), and *Arts and crafts* (-1.2 million PLN).

In the structure of Poland's foreign trade, trade in cultural and creative goods was not a significant item, accounting for 1.5% of exports and 1.0% of total imports of goods. As for the direction of trade in cultural and creative goods, the largest recipients of Polish goods of this type were the EU countries (93.1% of exports). Poland imported the most cultural and creative goods also from the EU countries (47.2% of total imports), as well as from developing countries (24.2%).

In 2019, cultural and creative services worth 11,136.6 million PLN were sold abroad, and cultural and creative services worth 10,327.9 million PLN were purchased. The turnover of the international exchange of cultural and creative services increased more than the turnover of the exchange of cultural and creative goods. Compared to 2018, the value of exported services increased by 1.6% while the value of imported services – by 1.7%. A positive service trade balance of 808.7 million PLN was recorded.

The largest share in the export of cultural and creative services was recorded in the domain of *Advertising* (85.5%), followed by *Audiovisual arts and multimedia* (6.6%). The import

structure was slightly more balanced: *Advertising* – 58.3%, *Audiovisual arts and multimedia* – 28.7%.

Cultural and creative services had only a slightly greater significance in Poland's foreign trade balance than the trade of goods. Their value amounted to 4.1% and 6.2% of exports and imports of all services, respectively. Services included in the cultural and creative categories were mainly exported to the EU countries (67.3%); most of this type of services imported to Poland also came from there (82.8%).

Table 2. Foreign trade in cultural and creative goods and services by domain of culture in 2019

Cultural domains	Cultural and creative goods		Cultural and creative services	
	export	import	export	import
in million PLN				
TOTAL	15,213.0	10,040.5	11,136.6	10,327.9
Cultural heritage	16.4	58.9	398.6	190.4
Books and press	6,625.5	2,223.7	133.7	479.6
Visual arts	172.2	105.7	–	–
Architecture	4.0	1.6	231.3	130.5
Performing arts	142.6	247.6	115.3	547.3
Audiovisual arts and multimedia	7,010.6	7,181.9	737.2	2,961.9
Advertising	1,241.3	219.4	9,520.5	6,018.3
Arts and crafts	0.5	1.7	–	–

When citing data from the Statistics Poland, please include the following information: "Source of data of the Statistics Poland", and in the case of published calculations made on the basis of data published by the Statistics Poland, please include the following information: "Own study based on the data of the Statistics Poland".

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[Cultural and creative industries in 2018](#)

[Culture in 2019 r.](#)

Terms used in official statistics

[Exports of goods and services](#)

[Imports of goods and services](#)

[Total costs](#)

[Average monthly gross wages and salaries](#)

[Average paid employment](#)

[Total revenues](#)

[Balance foreign trade commodity turnover](#)

[Balance of services](#)

[Cost level indicator](#)

[Gross earnings](#)