

The creative industries effect

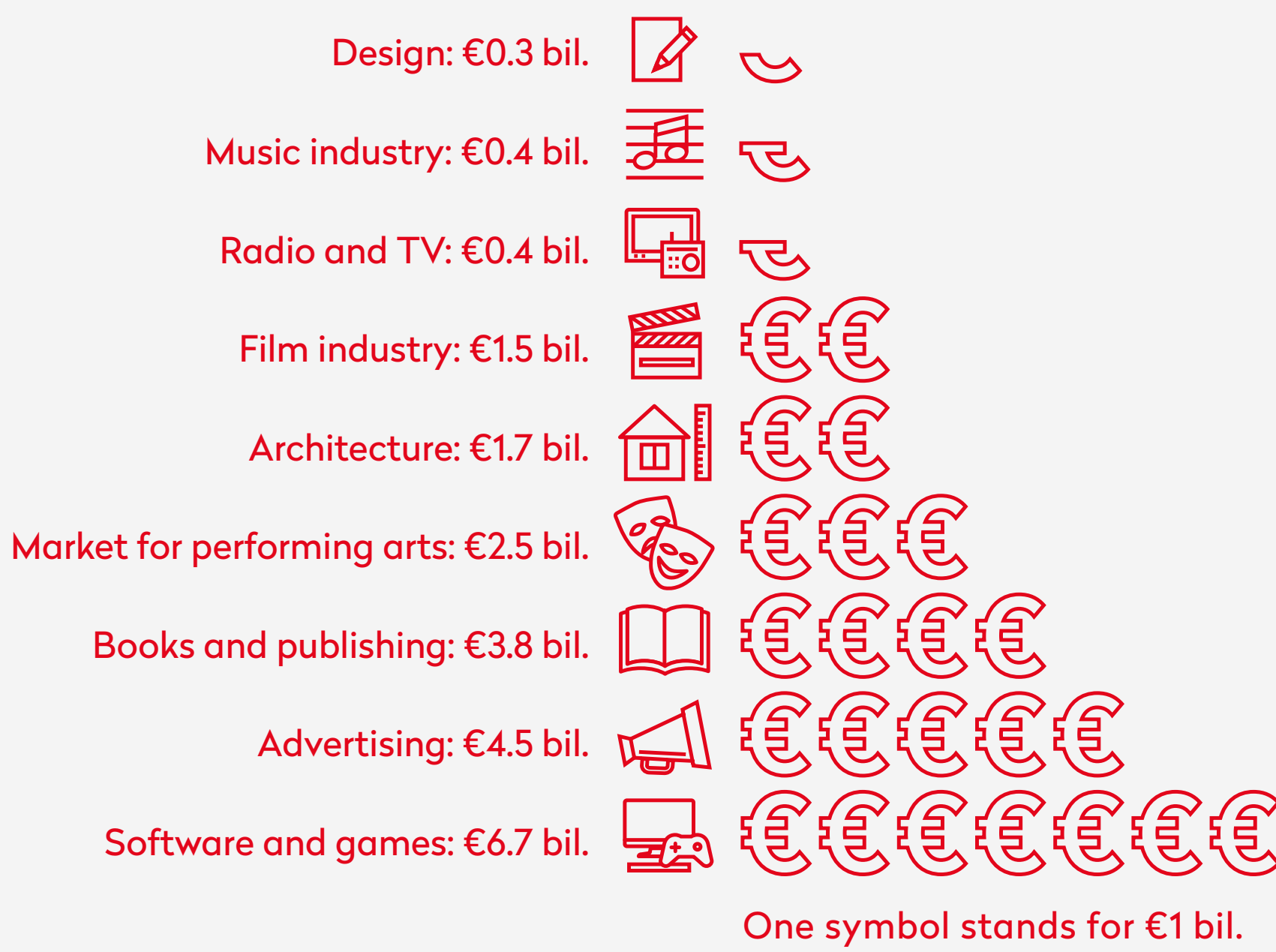
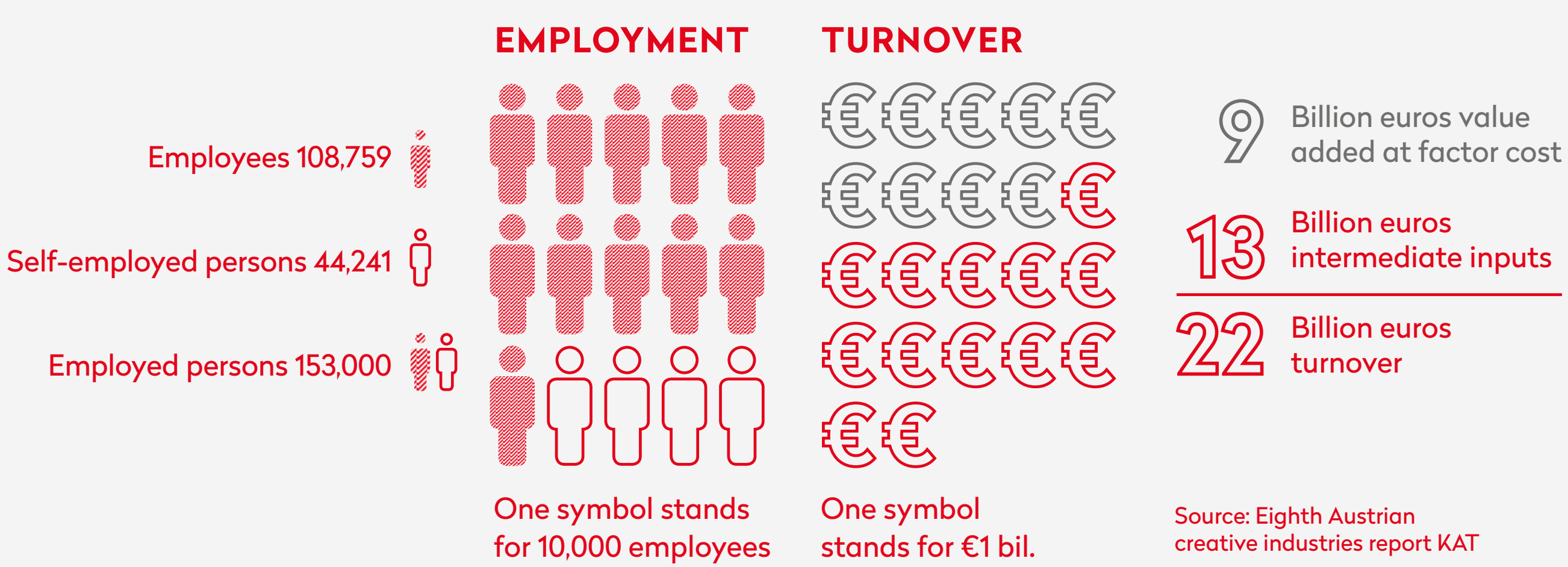


Every tenth enterprise in Austria is part of the creative industries



10% of the enterprises in Austria are part of the creative industries, which corresponds to around 11%. These approx. 42,000 creative industries enterprises generate an annual turnover of €22 bil. – that correspond to almost 4% of the whole Austrian economic output!

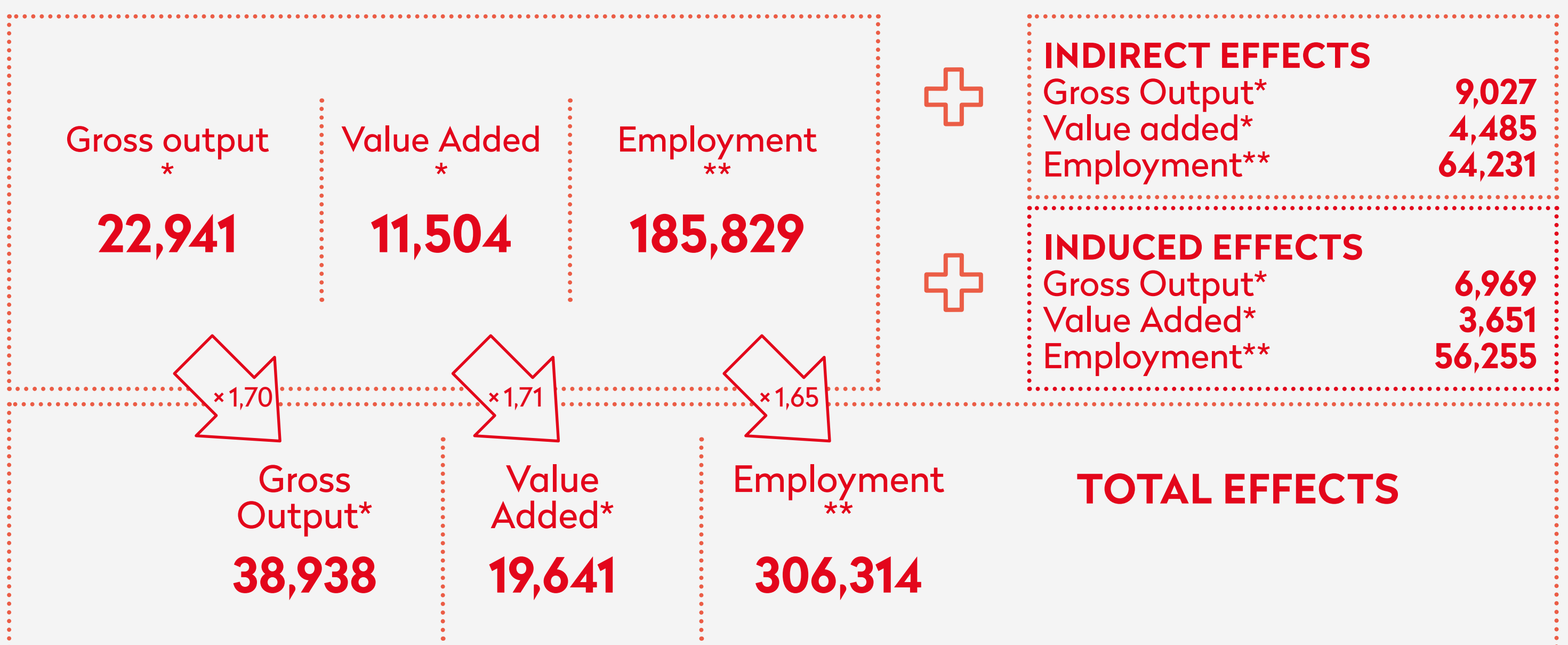
22 bil. turnover in the creative industries



The size of the creative industries

With €22 bil. turnover and over 42,000 enterprises, more than every tenth enterprise in Austria is part of the creative industries. The sector of software and games is the strongest, with a turnover of around €7 bil., followed by advertising with around €5 bil. The third strongest sector in the creative industries is books and publishing with almost €4 bil. turnover, closely followed by the market for performing arts (€3 bil.).

The creative industries effect in the national economy

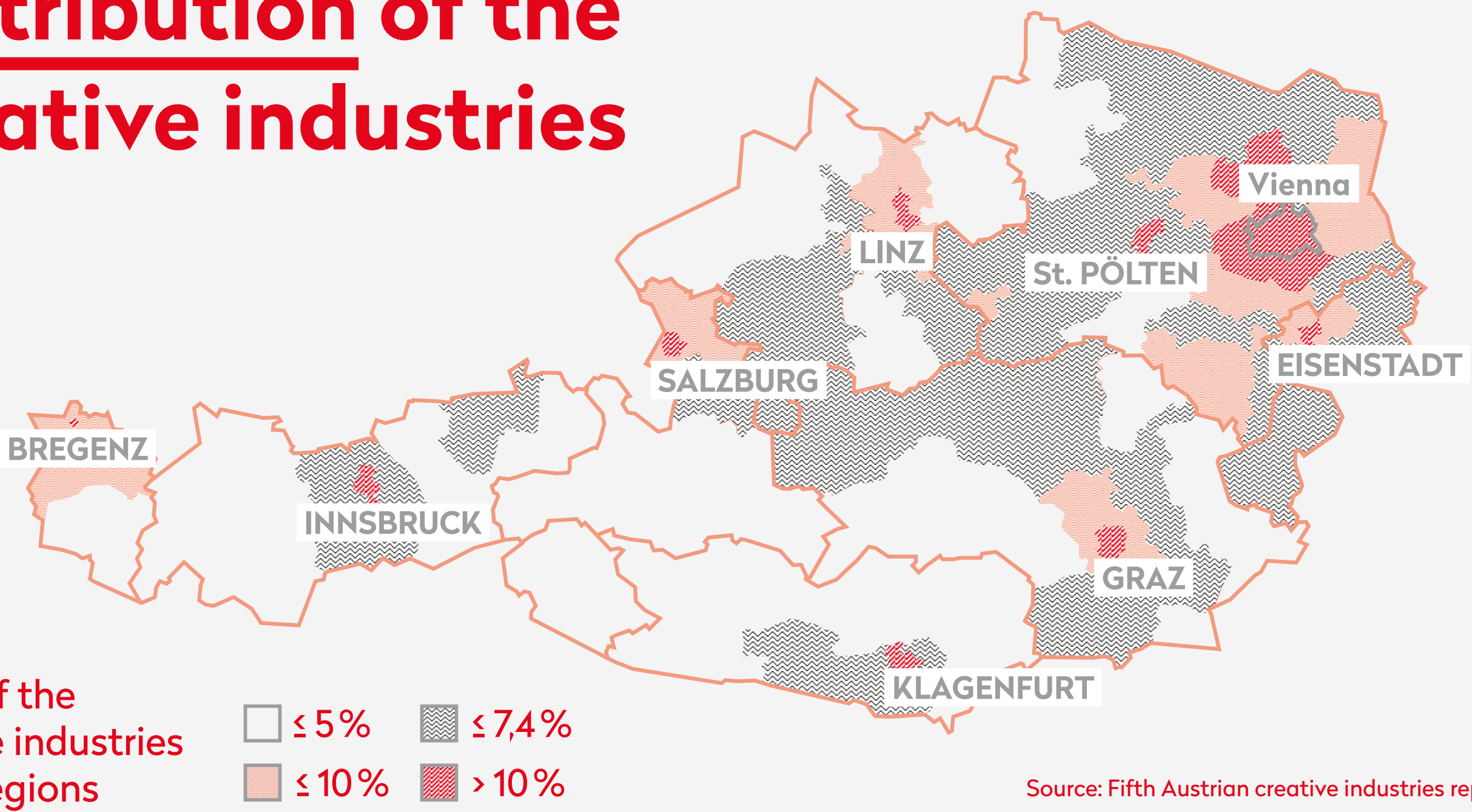


The creative industries effect



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Distribution of the creative industries



Source: Fifth Austrian creative industries report, KAT, 2013



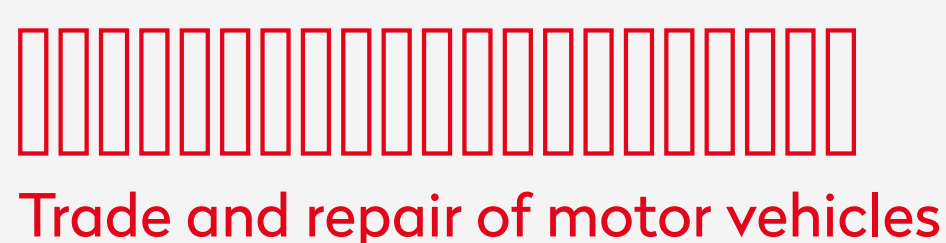
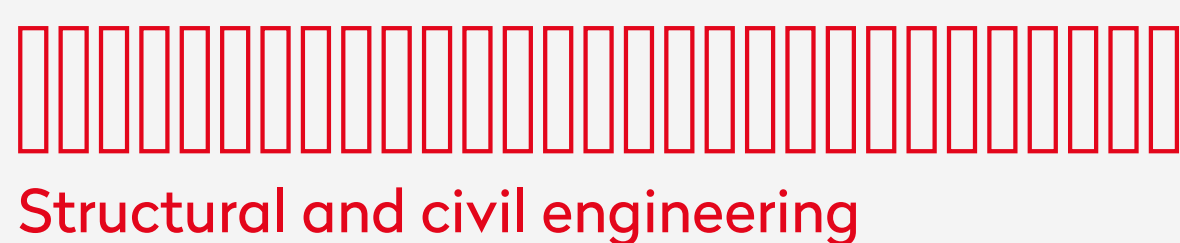
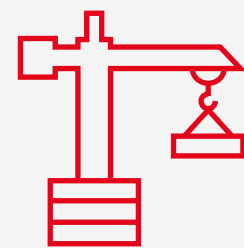
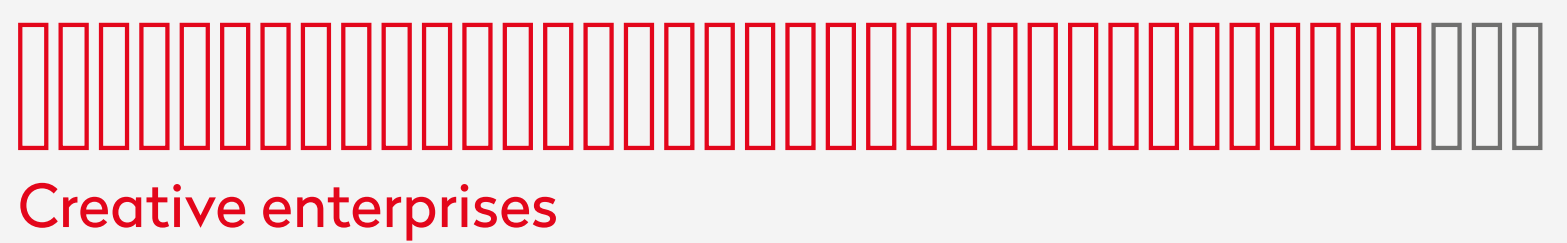
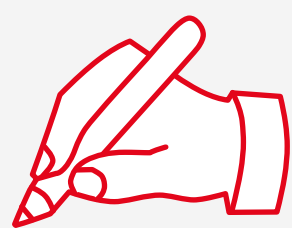
Regional roots

The Austrian creatives are regionally rooted and have their customers and cooperation partners in the vicinity. Thereby, they provide important stimuli for their region. Four out of ten creative enterprises are based in Vienna, and a further 40% in Lower and Upper Austria, Styria and Salzburg.

Source: Eighth Austrian creative industries report KAT

Creative industries stronger than structural and civil engineering as well as trade and repair of motor vehicles

The economic performance is the measured proportion of the overall economy (GDP) and has risen from 3.5% to 3.8% in the creative industries in the last ten years. In this context, it is shown that the economic performance in the creative industries enterprises is almost as big as in tourism (4%), significantly higher than in structural and civil engineering (2.9%) and almost twice as high as in the trade and repair of motor vehicles (2.1%).



█ Increase in the last ten years

Share of value added in the overall economy (sections B to S of the ÖNACE 2008), reference year 2016. Sources: Austrian Institute for SME Research, Statistics Austria.

Source: Eighth Austrian creative industries report, KAT

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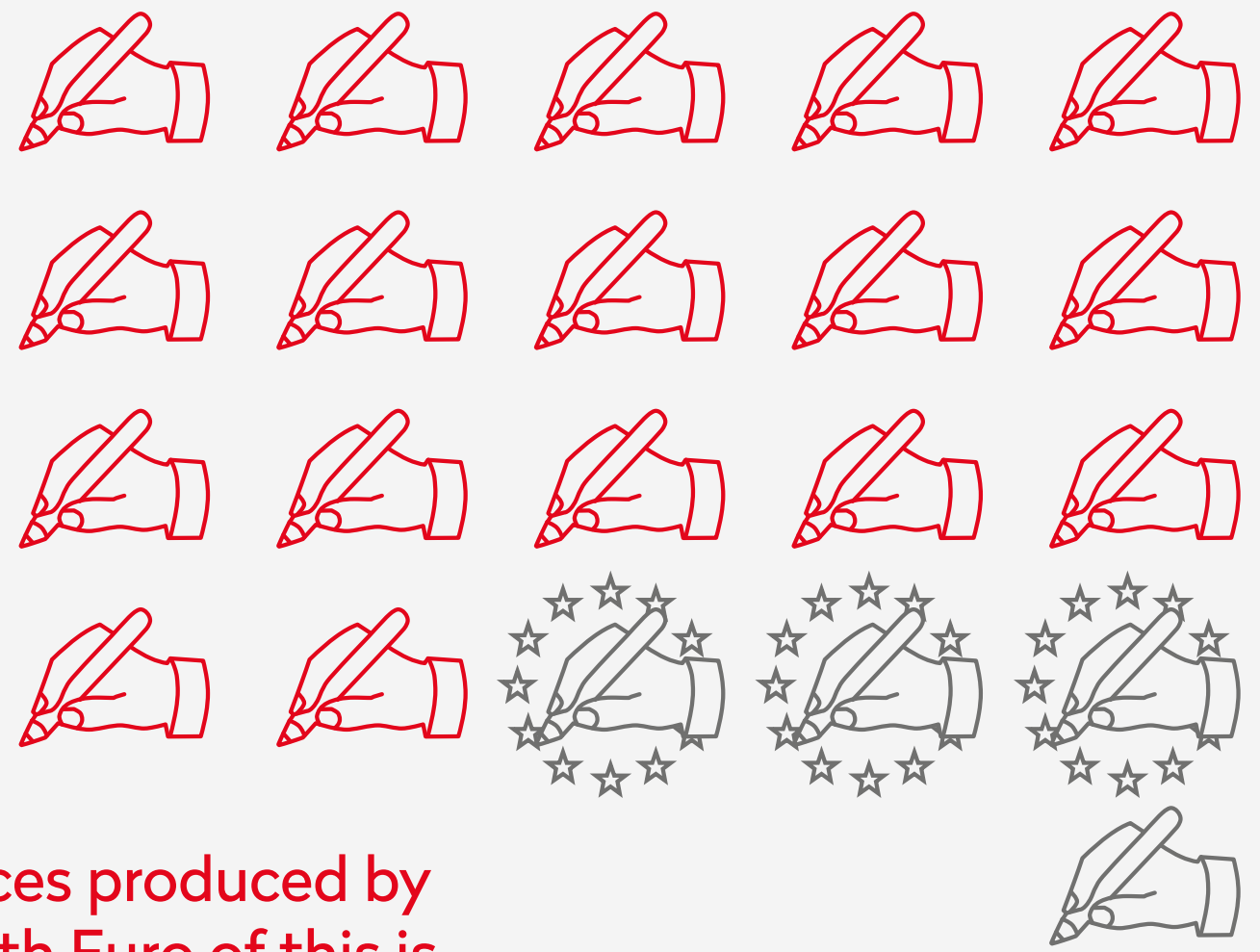
Focus
Internationalisation



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The creative industries are strong exporters

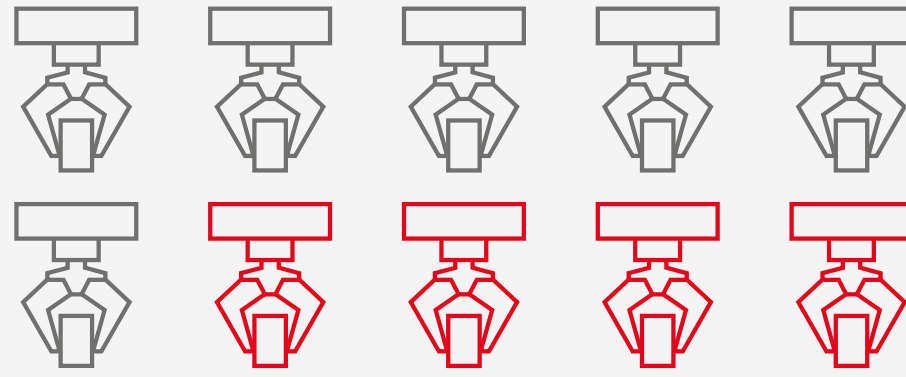
-  **17** billion euros of output destined for the domestic Austrian market
 -  **3** billion euros of exports to the EU28
 -  **1** billion euros of export to international markets (extra EU28)
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- 21** billion euros value of all goods and services produced by creative industries



The annual volume of all products, goods and services produced by creative industries is approximately €21 bil. Every fifth Euro of this is generated abroad, which corresponds to around €4 bil.

One symbol stands for €1 bil.

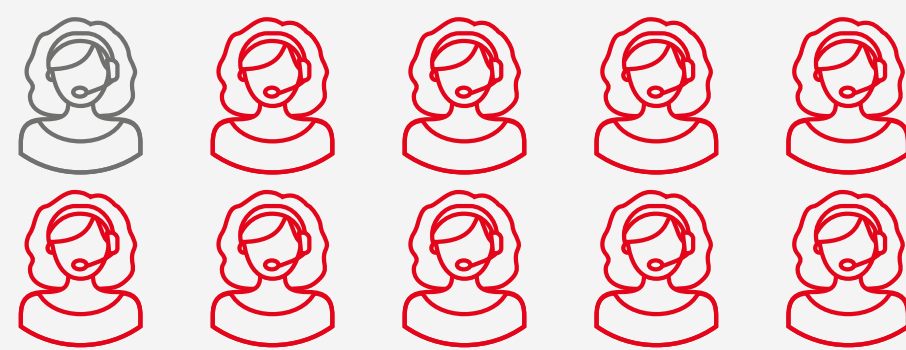
Export rate of the Austrian manufacturing sector: Six out of ten products manufactured are exported abroad.



Export quotas

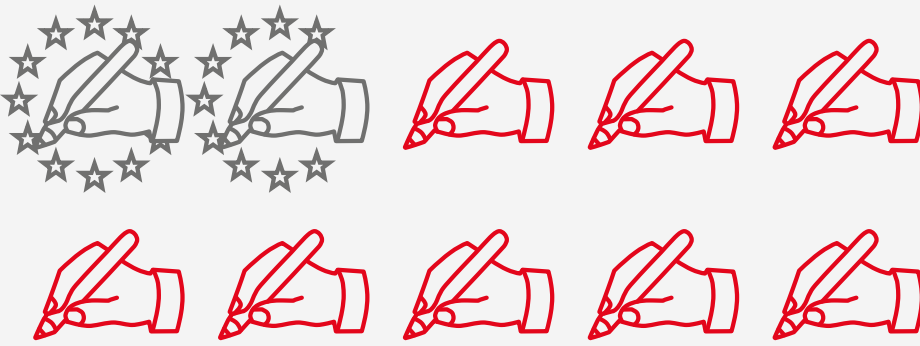
In comparison to other sectors such as the services sector (12.5%), the Austrian creative industries are extremely strong exporters with an average export rate of 19%.

Export rate of the Austrian services sector: 12.5% of the services are generated in export.



Grey symbols stand for exports, Red for domestic market.

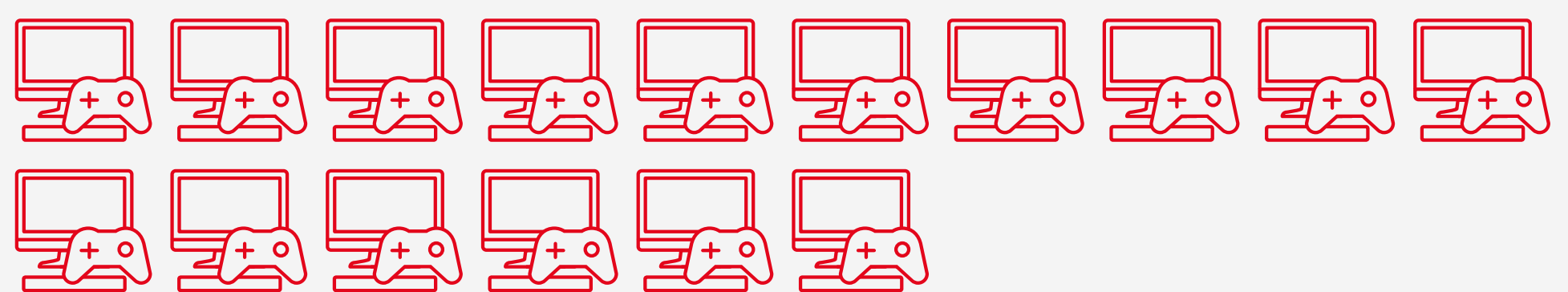
The export rate of the Austrian creative industries is around 19%, and 70% of them go to the EU-28.



Sources: Production and exports of creative industries goods in Austria, evaluation of satellite accounts for the creative industries according to goods (CPA), 2013, Datasheet creative industries 2017, 2018.

Software and games as export carthorse

The sector of software and games provides the greatest exports in the creative industries with around €1.7 bil., followed by advertising with approximately €1 bil.



Exports of software and games: €1.68 bil.



Exports of advertising: €992 mil.



Exports of books and publishing: €752 mil.

One symbol stands for €100 mil.

Sources: IWI satellite account for the creative industries, IWI calculations (2018).

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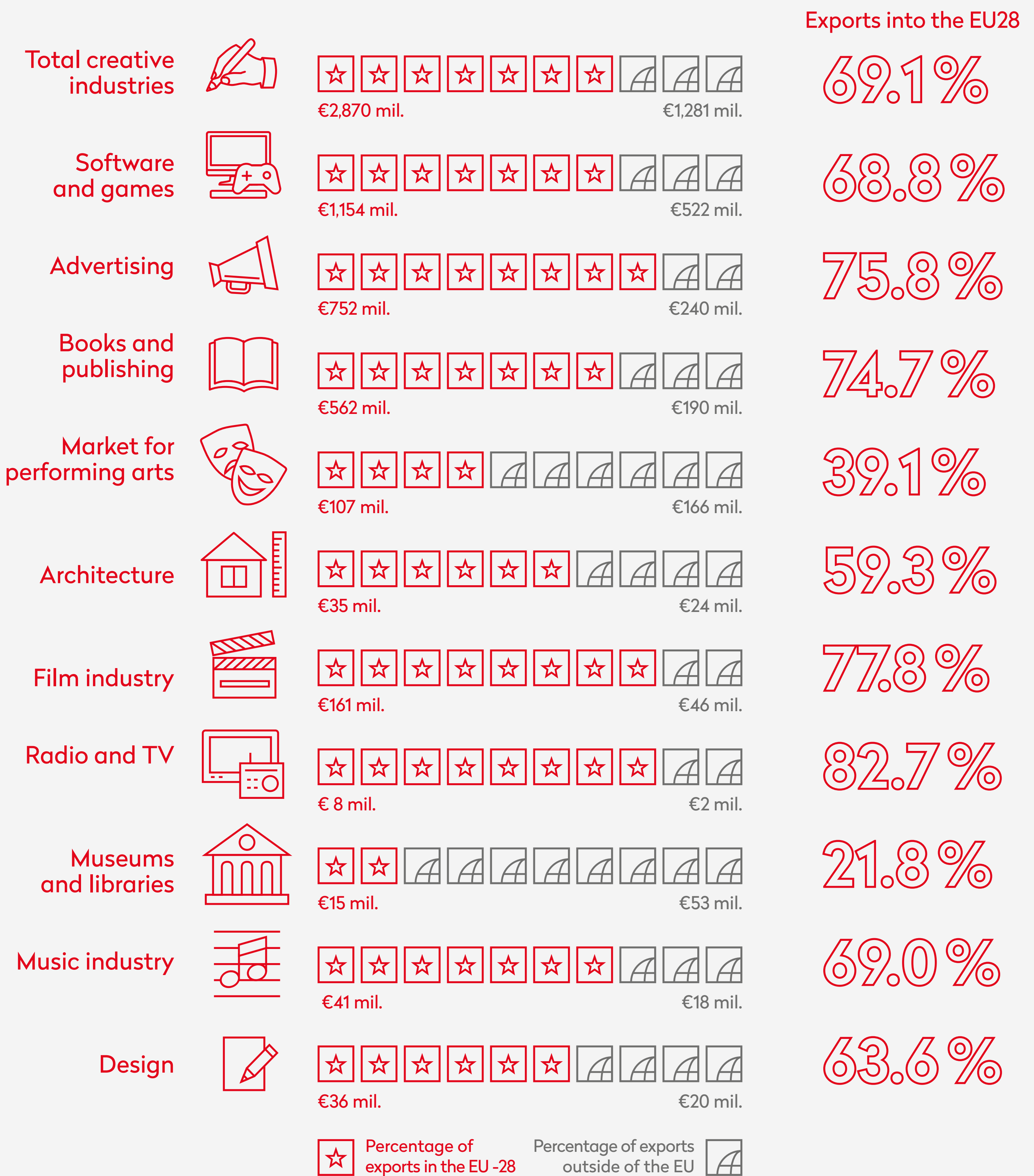
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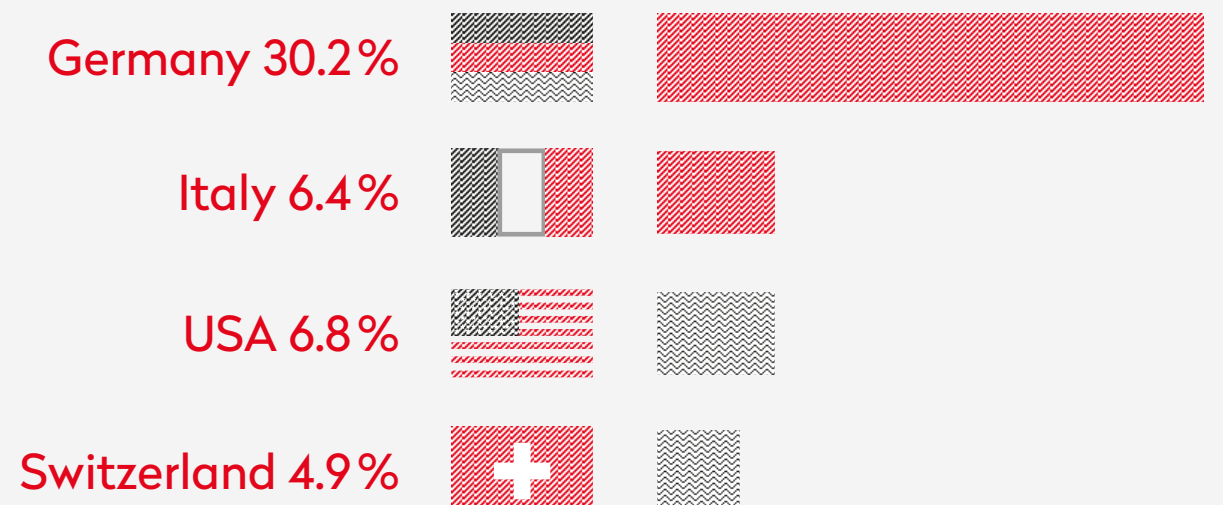
The European Union as an export centre

The focus of the Austrian creative export industries is clearly in the 28 EU member states. Almost 70% of the export turnover are achieved within the European Union.



The most important export countries

The same four export markets are relevant for the creative industries as for the overall economy. Therefore, the largest percentage of Austrian exports are accounted for by Germany. Further important export markets for Austria are Italy, the USA and Switzerland.



Source: Austria's foreign trade results January to December 2017.

Source: Eighth Austrian creative economy report KAT

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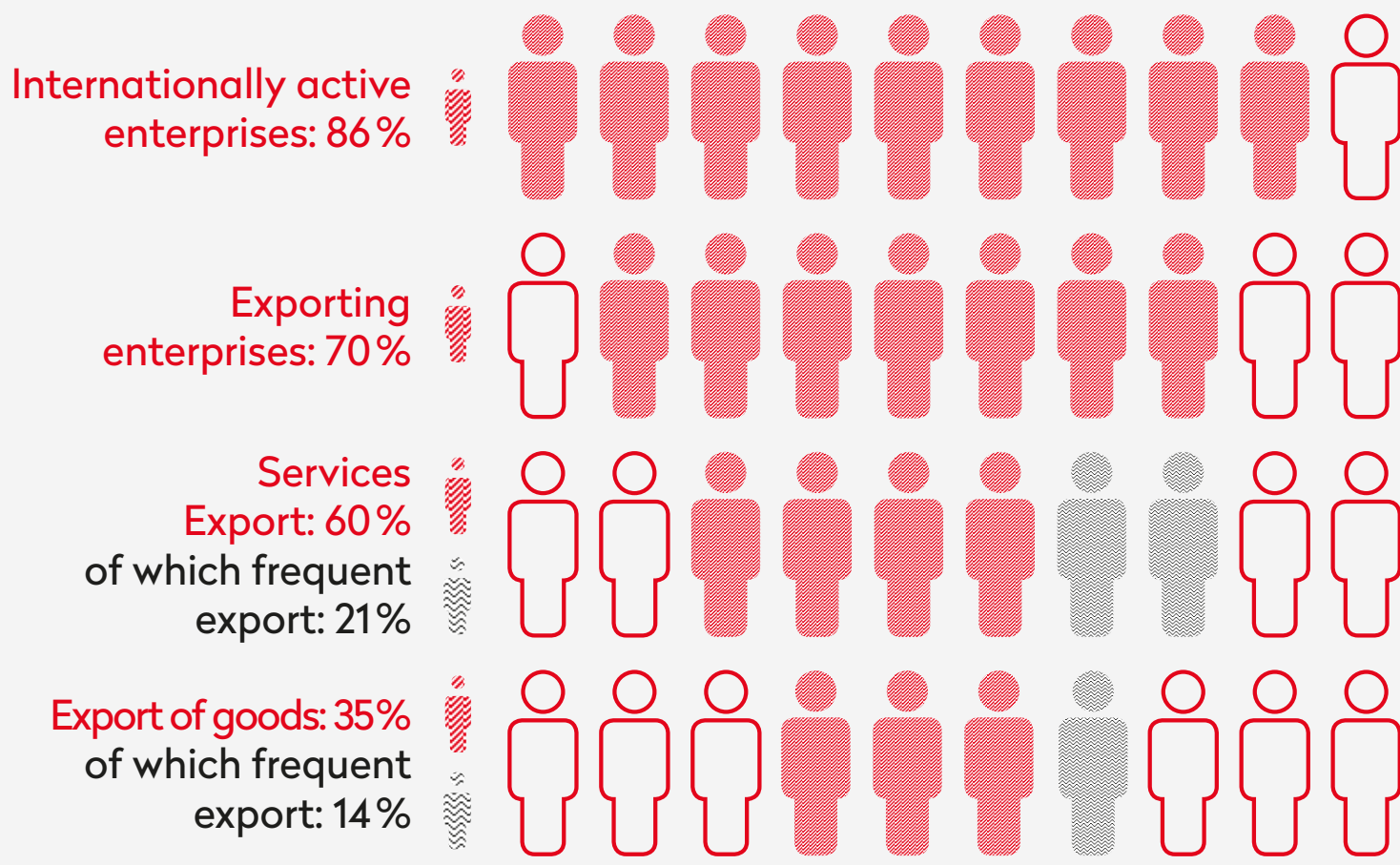


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Creative enterprises are internationally active

For 86% of creative industries enterprises, international operations play a crucial role. Seven out of ten enterprises are therefore active in export. Out of these enterprises, 60% export services occasionally and 21% on a regular basis. More than a third (35%) export individual goods, 14% of these often.

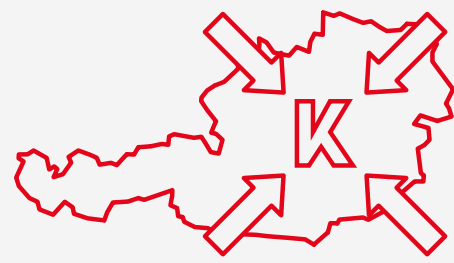
Source: Austrian Institute for SME Research, Enterprise survey 2017, N = 527.



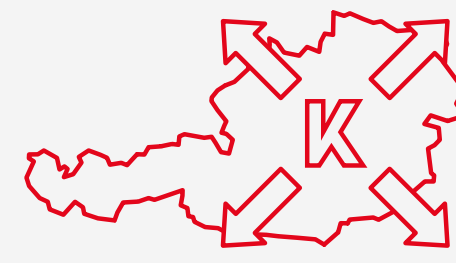
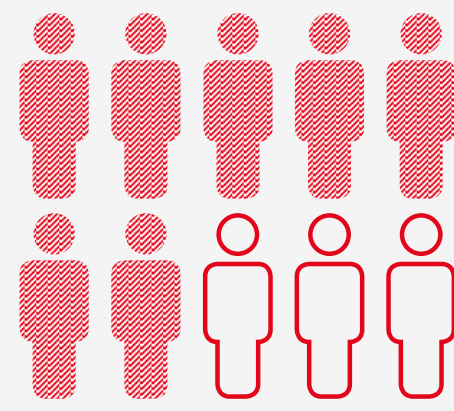
Frequent international operations

Two out of three domestic creative industries enterprises import products from abroad (67%). In contrast, six out of ten enterprises export services. Goods and products are exported by a third (36%) of creative industries enterprises. Almost the same amount of enterprises (34%) cooperate with international enterprises and/or institutions, or purchase services outside of Austria (38%). Almost a fifth of enterprises outsource processes to foreign enterprises, at least occasionally.

PROCUREMENT RELATED
FOR PURCHASING

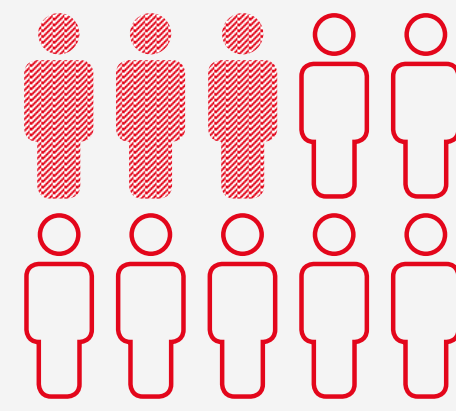


Around two thirds
of domestic creative
enterprises import
products from abroad

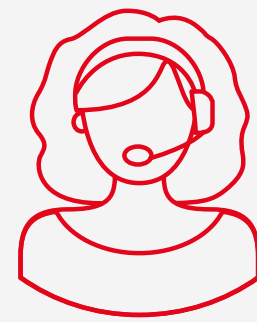
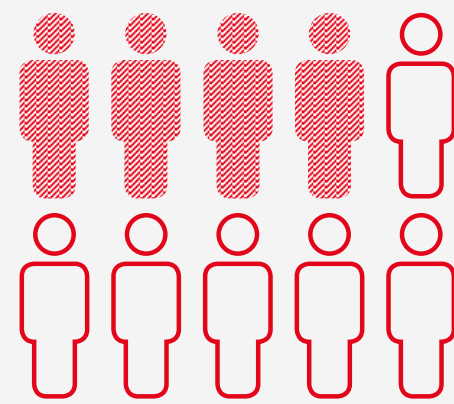


SALES RELATED
FOR DISTRIBUTION

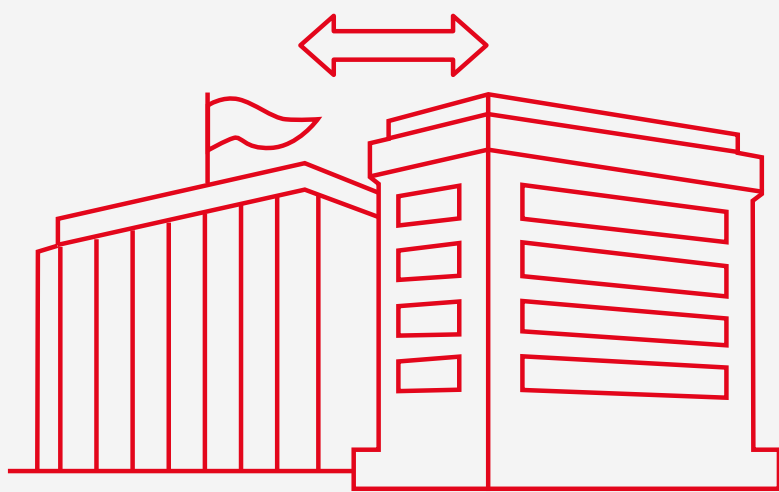
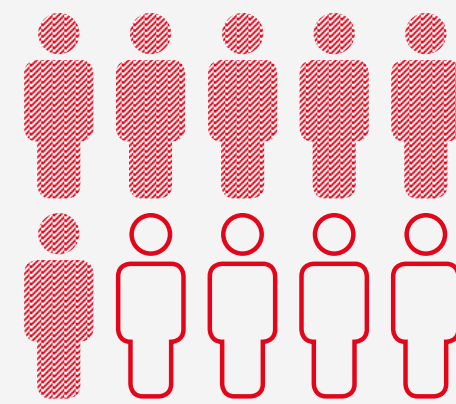
More than a third of
enterprises sell goods
beyond the country
borders



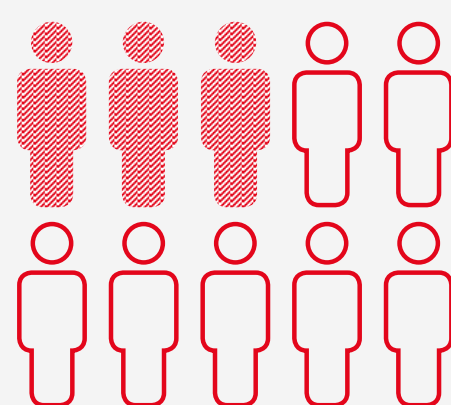
More than a third of
enterprises purchase services
from outside of Austria



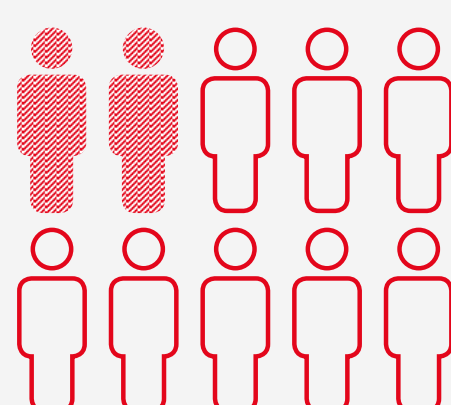
Almost six out of ten
enterprises export
services abroad



Almost a fifth of enterprises
outsource processes to foreign
enterprises, at least occasionally.



More than a third of enterprises
cooperate with foreign enterprises
and/or institutions



Source: Austrian Institute for SME Research,
Enterprise survey 2017, N = 527 – without
internationally active enterprises

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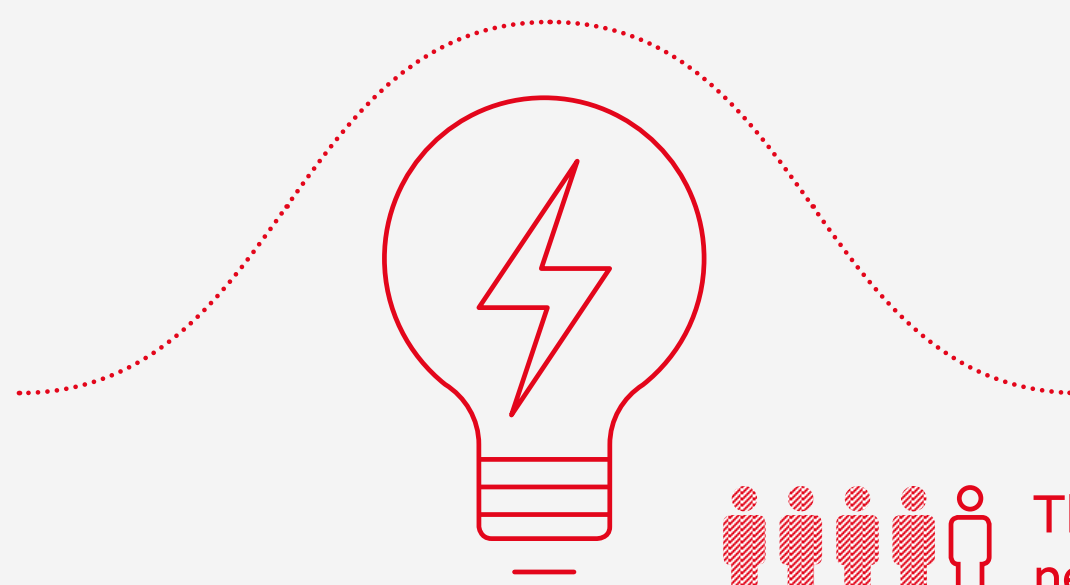


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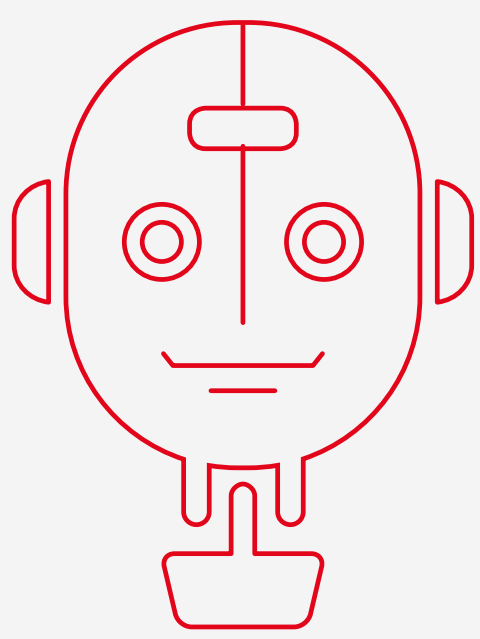
Main motives for internationalisation


Procurement related motives for foreign operations

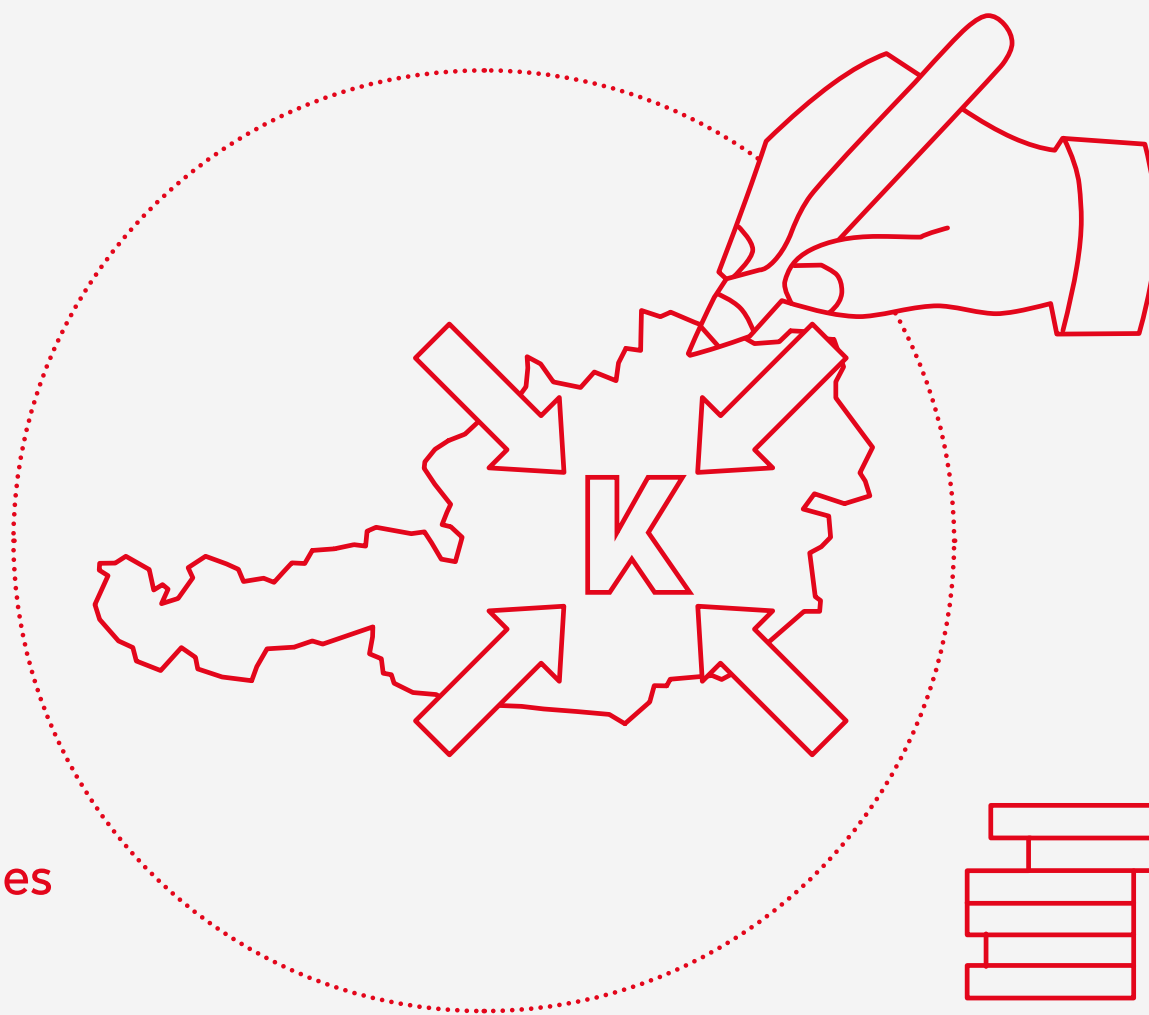
For creative industries enterprises, the search for new ideas for products/services/technologies (42%), the procurement of new technologies (29%) and price advantages on the procurement market (29%) are important reasons for their international activities.



 The search for new ideas for products and services

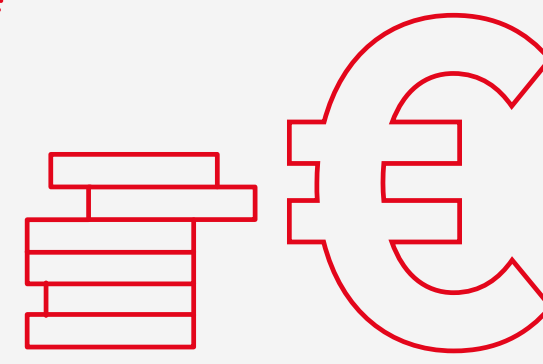


 The search for new technologies



PROCUREMENT RELATED FOR THE PURCHASE

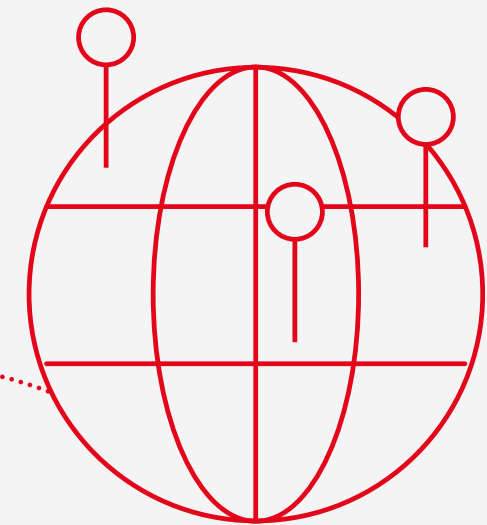
 Price advantages on the procurement market



Sales related motives for foreign operations

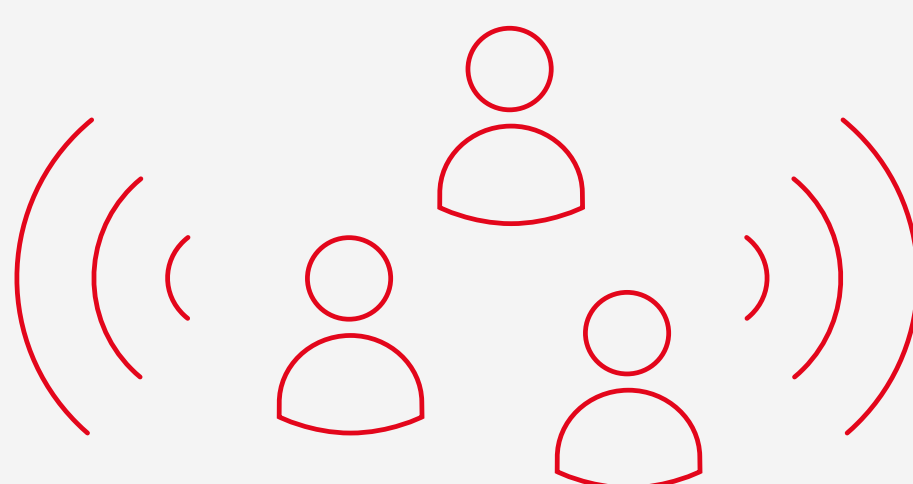
Important motives for creative enterprises are the expansion of sales markets (53%) as well as increasing their own level of brand awareness (47%) and turnover (47%).

 Expansion of the sales market as well as the customer and audience groups



Source: Austrian Institute for SME Research, company survey 2017, N = 544 (internationally active enterprises).

SALES RELATED FOR DISTRIBUTION



 Increasing level of brand awareness

 Turnover increases

