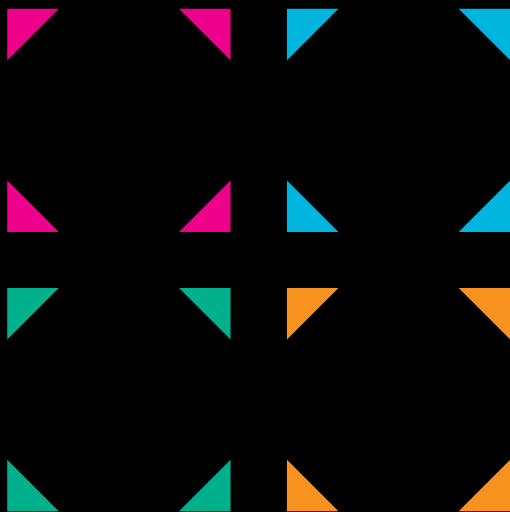


Creative Industries in Finland

Facts & Figures



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Facts & Figures, 2009

ISBN 978-952-67278-0-6

Editor:

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Tallberginkatu 1 C 137
FI-00180 Helsinki
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www.cupore.fi

Publisher:

Creative Industries Finland
Helsinki University of Technology
Lifelong Learning Institute Dipoli
P.O. Box 8000
FI-02015 TKK
Finland
www.creativeindustries.fi
www.cupore.fi

Graphic Design:

Ama Design Arja Karhumaa

Multiprint Ltd
Helsinki 2009

This presentation provides statistical indicators on the present state of Finnish creative industries. Information has been reassembled by CUPORE – Foundation for Cultural Policy Research as a part of the Creative Industries Finland project. Creative Industries Finland (CIF) is responsible for the coordination of the National Development Programme for Business Growth and Internationalization in the Creative industries 2007–2013. The programme is directed by the Finnish Ministry of Education and Culture and financed by the European Social Fund (ESF).

Creative Industries Finland focuses on providing services for creative industries developers, policy-makers as well as other key interest groups. It also coordinates and supports the realization of 10–20 development projects funded from the national programme. CIF is administered by the Lifelong Learning Institute Dipoli at the Helsinki University of Technology and realized in co-operation with the city of Tampere/ Creative Tampere and CUPORE – Foundation for Cultural Policy Research.

Read more: www.creativeindustries.fi.

Definitions

In the development programme creative industries are defined as a sector including such areas in cultural and experience services as design, graphic industries, architecture, film and TV production and distribution, digital content production, music and audio production, book publishing and distribution, performing arts, visual arts and cultural events production. The output in creative industries comprises works, copyrights and services.

Creative industries as a concept is statistically ambiguous. That is why in this snapshot two different sets of definitions, both used in Finland, are used in presenting the key indicators: **copyright industries** (as defined by WIPO as regards core and interdependent copyright industries) and **cultural industries** (as defined in Statistics Finland's Culture Satellite Account). Statistical data is provided by Statistics Finland and gathered from studies made in the field of copyright as well as figures provided by professional organizations. The differences between figures contained in the Culture Satellite Account and studies on economic contribution of copyright industries stem from different methodologies used.

Copyright industries

Core copyright industries

- Press and literature
- Music, theatrical productions, opera
- Motion picture and video
- Radio and television
- Photography
- Software and databases
- Visual and graphic arts
- Advertising
- Collective management organisations

Interdependent copyright industries

- TV-sets, radios, VCRS/CD players, game equipments etc.
- Computers and equipment
- Musical instruments
- Photographic and cinematographic instruments
- Photocopiers
- Blank recording material
- Paper industry

Cultural industries

- Artistic, theatre and concert activities
- Libraries, archives, museums, etc.
- Art and antique shops
- Production and distribution of books
- Newspapers, periodicals and news agencies
- Production and distribution of motion pictures and videos
- Manufacture and sale of musical instruments
- Sound recordings
- Radio and television
- Printing and related activities
- Advertising
- Architectural and industrial design
- Photography
- Amusement parks, games and other entertainment and recreation
- Manufacture and sale of entertainment electronics
- Organisation of cultural events and related activity
- Education and cultural administration

Finland in Brief

Population at year-end 2007:

5 300 484

Land area km²:

303 900,7

(population per km² of land area 17,4)

GDP per capita in 2007:

33 985 euro

Economic Contribution of Finnish Copyright and Cultural Industries

- ▶ Turnover of Finnish copyright-based industries was in total 21,7 billion euro in 2005. The core copyright industries made up 64 % of the turnover. Of core copyright industries the most significant contribution was generated in software and databases and press and literature.
- ▶ The value added of copyright-based industries was 6,8 billion euro which constituted 4,3 % of Finnish GDP in 2005. The core copyright industries made up 81 % of the value added in total and 3,5 % of the GDP.
- ▶ According to Finnish Culture Satellite Account, the gross value added (GVA) of cultural industries was 4,4 billion euro in 2005 which was 3,2 % of the Finnish GVA that year. Largest share (24,4 %) was generated in newspapers, periodicals and news agencies with artistic activities making up 6,1 % of the GVA.¹

¹ The difference between the economic contribution of culture according to Culture Satellite (3.2 %) and that of copyright industries (4.3 %) is due to the inclusion of software and database in the latter. The difference is smaller than what it is in reality, because the contribution of copyright industries is related to GDP whereas the culture satellite refers to GVA (gross value added). In 2005 GDP was about 20 billion euro larger than national GVA.

Table 1: Gross value added of culture by industry in 2005*

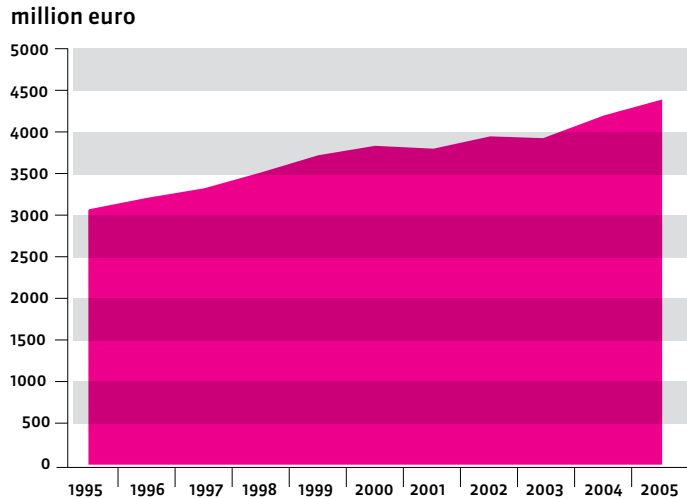
Gross Value Added, total (EUR million)	136 595
Of which culture (EUR million)	4 409
Culture (%)	3,2

Industry	Value added, eur million	Percentage of value added of culture (%)
Artistic, theatre and concert activities	270	6,1
Libraries, archives, museums, etc.	304	6,9
Art and antique shops	5	0,1
Production and distribution of books	217	4,9
Newspapers, periodicals and news agencies	1 075	24,4
Production and distribution of motion pictures and videos	111	2,5
Manufacture and sale of musical instruments	21	0,5
Sound recordings	35	0,8
Radio and television	428	9,7
Printing and related activities	592	13,4
Advertising	388	8,8
Architectural and industrial design	226	5,1
Photography	84	1,9
Amusement parks, games and other entertainment and recreation	261	5,9
Manufacture and sale of entertainment electronics	164	3,7
Cultural events and related activities	109	2,5
Education and cultural administration	120	2,7
TOTAL	4 409	100,0 %

* According to the Standard Industrial Classification 2002.

Source: Statistics Finland, Cultural statistics 2007, according to Statistics Finland, National Accounts (2006)

Figure 1: Value added of cultural industries at current price in 1995–2005



Source: Statistics Finland, Culture Satellite Account

Figure 2: Shares (%) of value added in certain industries in 2005

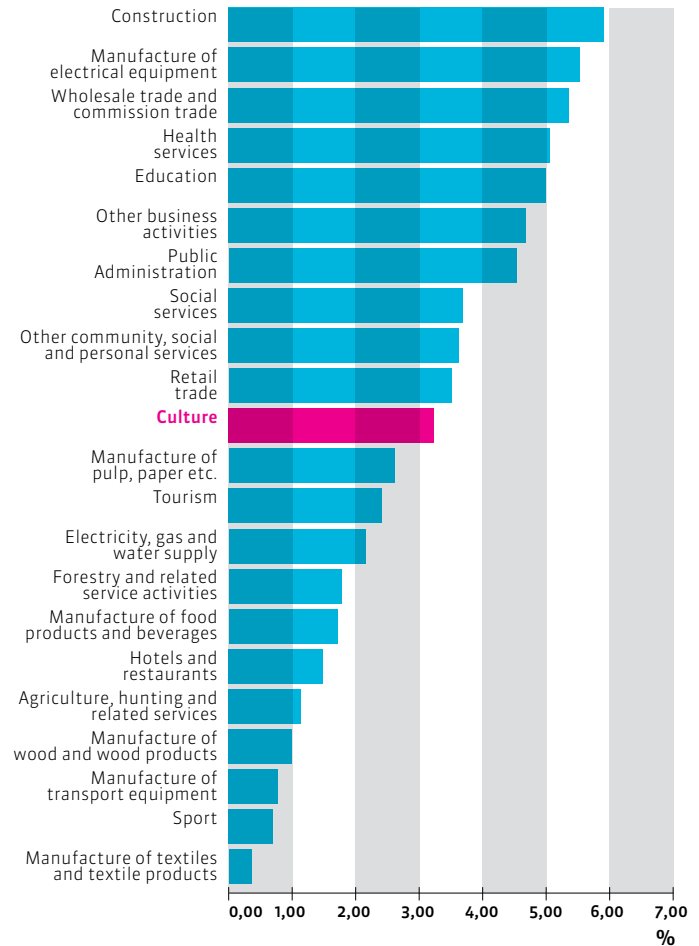
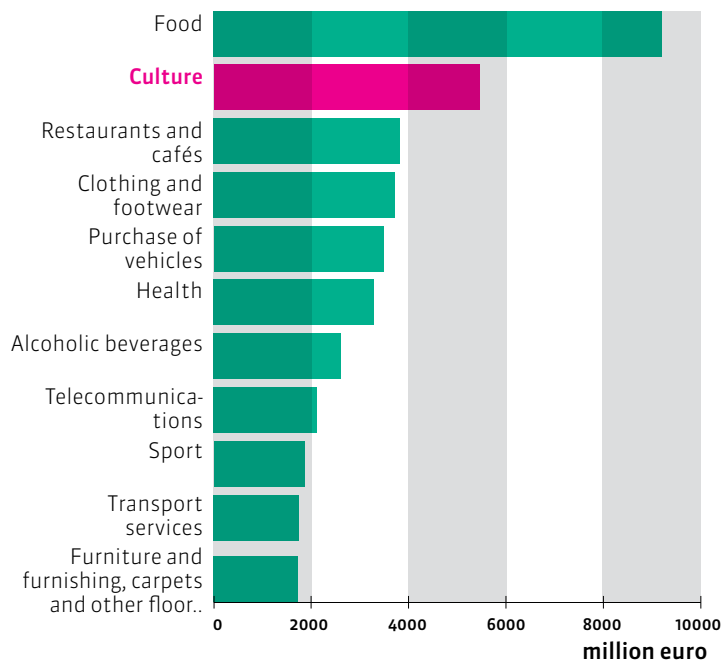


Figure 3: The overall amounts of selected private consumption items in 2005



- ▶ In 2005, approximately 5.5 billion euro were used for private cultural consumption², when at the same time 9.2 billion euro were spent on foodstuffs.

² For private consumption, the definition of culture includes cultural services, art objects, books, newspapers and periodicals, records, cassettes and videos and the renting of them, photographic equipment and services, games, radios and televisions and other such appliances.

- ▶ According to Statistics Finland, the employed labour force³ in cultural industries in 2005 was 85 259 persons which made up 3,8 % of all employed labour force in the country. Most people were employed in the production and distribution of newspapers and periodicals while the growth has in the last years (2004–2005) been most significant in architecture and industrial design, art and antique shops and the production and distribution of music.
- ▶ According to Statistics Finland, culture and media enterprises made up 6,1 % of all Finnish enterprises and employed 4,5 % of all staff, generated 4,0 % of turnover and paid 4,8 % of wages and salaries of all Finnish enterprises in 2006. Fields of advertising and architectural and industrial design had the biggest number of enterprises. The majority of turnover was generated in newspapers, periodicals and news agencies, in amusement parks, games and other entertainment and recreation and in the manufacture and sale of entertainment electronics.
- ▶ According to Finnish Culture Satellite Account, in 2005 the share of cultural goods of both overall imports and overall exports was 2,1 %. The corresponding figures for cultural services were 3,8 % (of imports) and 1,1 % (of exports). The export of cultural services was greater than imports only in advertising and organization of cultural events and related activities.

³ Statistics Finland, Employment Statistics

Industry information

▶ Advertising

- ▶ There were 2 827 enterprises in advertising with 6 823 employees and turnover of 1,5 billion euro in 2006.
- ▶ Between 1995 and 2005, employed labour force⁴ in advertising increased 59 % from 4 767 to 7 581.

▶ Architecture and Industrial Design, including Fashion

- ▶ There were 2 776 enterprises in architectural and industrial design with 4 847 employees and turnover of 405 million euro in 2006.
- ▶ Between 1995 and 2005, employed labour force in architectural services doubled (from 1 791 to 3 626) and in industrial design almost quadrupled (from 369 to 1461).

▶ Film

- ▶ There were 821 enterprises in the production and distribution of motion pictures and videos with 2 604 employees and turnover of 377 million euro in 2006.

⁴ Information on employed labour force of cultural industries according to Statistics Finland, Employment Statistics, except for games (information provided by Neogames Centre of Game Business) and performing arts (information provided by Finnish Theatre Information Centre, Finnish Theatre Statistics and the Association of Finnish Symphony Orchestras).

- ▶ Between 1995 and 2005, employed labour force in the production and distribution of motion pictures and videos increased 118 % from 1 391 to 3 025.
- ▶ All Finnish cinema admissions increased over 5 % to 6.9 million in 2008 while domestic film audiences increased by 22 % to 1 596 000 admissions. The gross box office in 2008 was 54,5 million euro. There were 196 operating cinemas in 2008.
- ▶ There were 19 domestic first releases in 2008. The market share for domestic films was over 23 %.

▶ Games

- ▶ The number of employees in Finnish games industry was 1147 and turnover of the industry was 87 million euro in 2008.
- ▶ Industry's exports were approximately 69 million euro in 2007 and 75 million euro in 2008, ie. on average 87 % of industry's turnover came from exports.

▶ Mass Media

- ▶ The value of mass media market (including printed, electronic and recorded media) in Finland was 4,4 billion euro in 2008. Printed media made up 67 % of the mass media market in Finland.
- ▶ Growth from the previous year was fastest in Internet (+34 %) and television (+9 %) activities. The overall growth of the electronic mass media market totalled 12 %. For printed media the growth was around zero.
- ▶ The two biggest media companies in Finland are Sanoma

WSOY⁵ and YLE, the Finnish Broadcasting Company⁶. In 2007 the turnover of Sanoma totaled 2,9 billion euro making it the biggest creative industries' enterprise in Finland. YLE's turnover was 385 million in the same year.

▶ Music Industry

- ▶ There were 508 enterprises in sound recordings⁷ with 485 employees and turnover of 79 million euro in 2006.
- ▶ Between 1995 and 2005, employed labour force in sound recordings increased 59 % from 361 to 575.
- ▶ Value of total retail sale of music and sound recordings in 2006 was 99 million euro (estimate). Share of digital music of all recorded music sales was 6 % in 2008. Over half of the volume of the music market in Finland was of domestic origin.
- ▶ Value of live music market in Finland was estimated to be 282 million euro in 2007.
- ▶ In 2007 value of Finnish music exports was 20 million euro (including sales of goods, services and copyright royalties).

▶ Performing Arts

- ▶ In Finland there were 46 drama theatres and 11 dance theatres subsidized by theatre law in 2007 and they employed approximately 2800 people. In addition, there are

numerous independent drama, dance, circus and multi-art performance groups.

- ▶ In 2007 there were 29 member orchestras in Association of Finnish Symphony Orchestras, all of them subsidised by public authorities. The orchestras employed 975 full-time musicians in 2007.
- ▶ In 2007 26% of spectators of Finnish dance companies attended performances abroad. The same figure for contemporary circus companies was 68 %.
- ▶ In 2007 Finnish orchestras gave 1641 concerts of which 95 % were in Finland and 5 % were abroad.

▶ Publishing

- ▶ There were 841 enterprises in production and distribution of books with 4 142 employees and turnover of 747 million euro in 2006.
- ▶ There were 1 068 enterprises in printing and related activities with 10 158 employees and turnover 1,4 billion euro in 2006.
- ▶ Between 1995 and 2005 employed labour force in the field of production and distribution of books increased 26 % from 4 044 to 5 090.
- ▶ In 2007 the value of book sales was 559 million euro.

▶ Visual Arts

- ▶ There were 208 enterprises in retail sale of art and art gallery activities with 205 employees and turnover of 22 million euro in 2006.

5 Sanoma is a newspaper, magazine, publishing, radio, TV and cable TV conglomerate.

6 Radio and TV.

7 Includes the publishing and reproduction of sound recordings.

- ▶ Between 1995 and 2005 employed labour force in visual arts (sculptors, painters and related artists) increased 21 % from 3 443 to 4 160.
- ▶ In 2007 there were 2 132 works sold at Finnish art auctions with the sales of 7 million euro and the average price of 3 292 euro.
- ▶ In 2006 there were 63 art museums in Finland which was 20 % of all the Finnish museums. Among art museums the most popular was the Museum of Contemporary Art Kiasma (part of the Finnish National Gallery) with 234 213 visitors annually.

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City of Helsinki



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