

- Changed Methodology –  
media- and creative industries study  
branch hearings
- Changed Cluster Strategy –  
influenced by Clusnet theory  
new cluster website
- Reuse of best practices –  
adaption of Budapest’s “kitchen budapest”  
reorientation of Business Innovation Center

## Definition of the Media & Creativity Cluster

- Aim of this combined study:  
To integrate two angles: the previous traditional view of the telecoms and media sectors with an examination of the younger arts and creativity segment
- Connection with other studies:  
The findings are presented in the study from both these angles – although for the sake of clarity this approach is largely dispensed with here.

## Multi-method study

- ❖ For the first time, a study based on a traditional survey and projections was augmented by other methods:
  - Extensive secondary analyses based on official statistics
  - Qualitative group discussions in four selected segments
  - The quantitative, standardised survey was augmented by open questions
- ❖ Quantitative assessment of the cluster is hence based on two sources:
  - ‘Hard’ statistics (delayed data set)
  - The survey (January–April 2011, 815 successful interviews, response rate 13.6%) and projections

## Businesses

- ❖ According to official statistics, there are **3,503 businesses in Leipzig** itself, a figure which rises to **5,133 when taking the two surrounding districts into account** (companies register in 2009, based on data from 2007; excludes very small enterprises and state/local authority sector).
- ❖ The number of **organisations** (businesses and institutions) in the **study area** (Leipzig and the surrounding district with a radius of 10km) is estimated at currently **4,400**.

## Number of workers in the Media & Creativity Cluster

(Projection for 2010 for Leipzig and area)

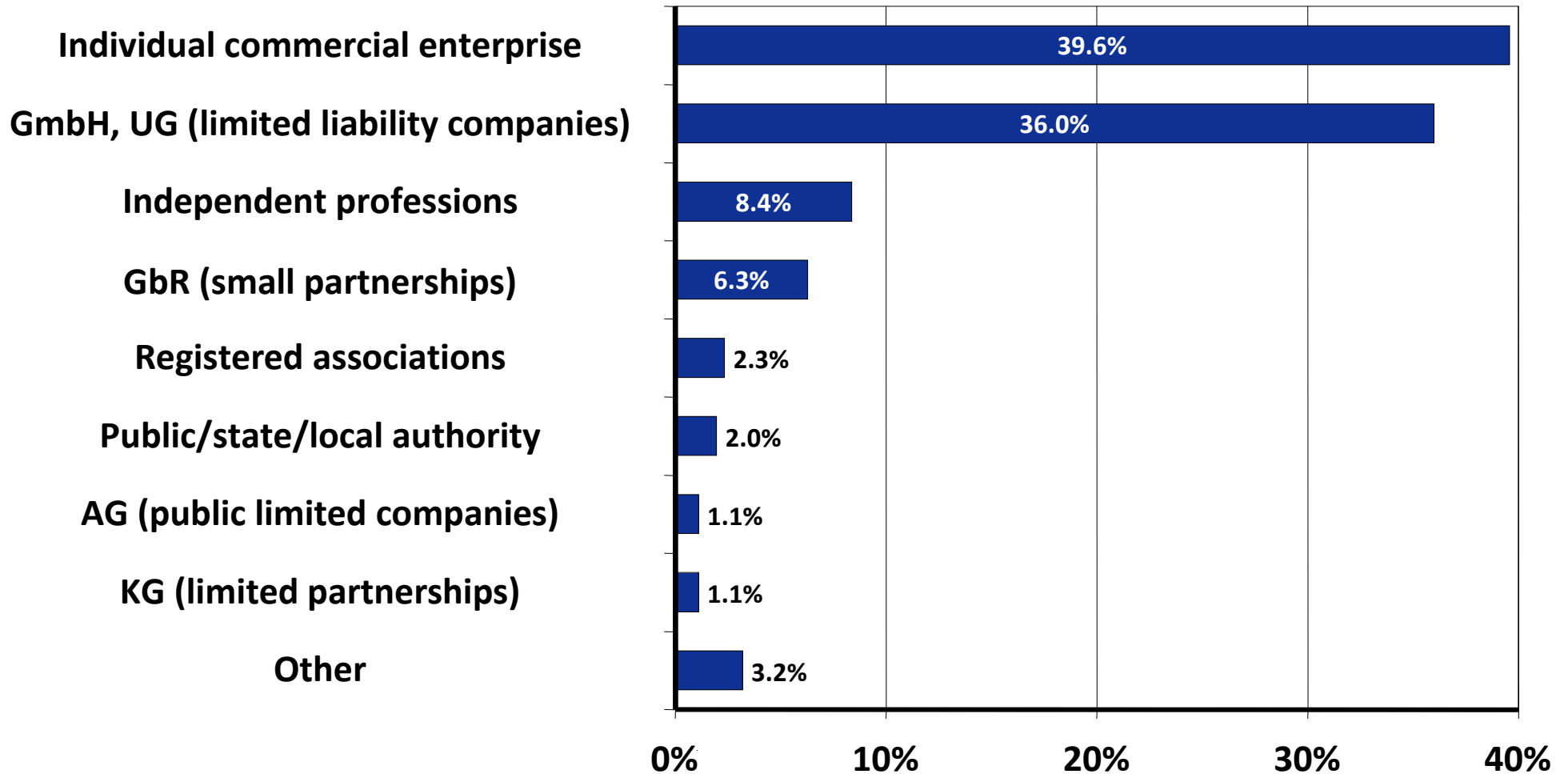
| Sectors / Workers                                 | Registered employees | Freelancers   | Total workers |               |
|---------------------------------------------------|----------------------|---------------|---------------|---------------|
| IT and telecoms                                   | 10,000               | 1,000         | 11,000        | 24.7%         |
| Newspapers and magazines, printing and publishing | 2,000                | 1,000         | 3,000         | 6.7%          |
| Broadcasting and film                             | 4,000                | 1,500         | 5,500         | 12.4%         |
| Arts and music                                    | 6,000                | 2,500         | 8,500         | 19.1%         |
| Marketing, PR, exhibitions and trade shows        | 3,000                | 3,000         | 6,000         | 13.5%         |
| Architectural market                              | 1,500                | 500           | 2,000         | 4.5%          |
| Other media and cultural services                 | 5,500                | 3,000         | 8,500         | 19.1%         |
| <b>Total</b>                                      | <b>32,000</b>        | <b>12,500</b> | <b>44,500</b> | <b>100.0%</b> |

## Turnover of the Media & Creativity Cluster

- ❖ According to projections, turnover in the study area is **calculated to be about €5.057 billion** (total turnover of companies represented in the area, including small companies as well as budgets of state/local authority companies and public corporations). However, we believe this estimate to be **exaggerated** owing to specific problems of the methods used.
- ❖ Taking into account snags in the methods employed to gauge and calculate turnover, the **turnover of media and creativity activities** of the cluster firms in the study area can be put at **between €3bn and €4bn**.
- ❖ The next slide shows a breakdown of turnover and highlights the relative proportions. However, the importance of these percentages based on projections should not be inflated.

# Legal forms of Media & Creativity Cluster

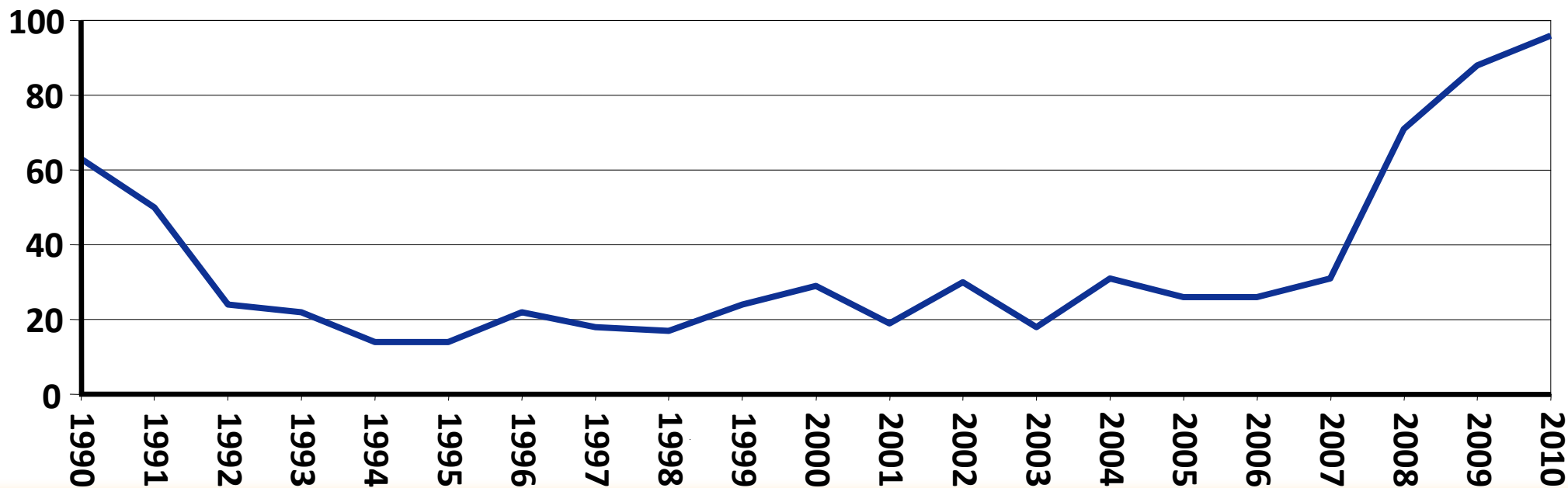
(Statistical sample: n = 811)



# Average year of foundation/no. of new businesses 1990–2010

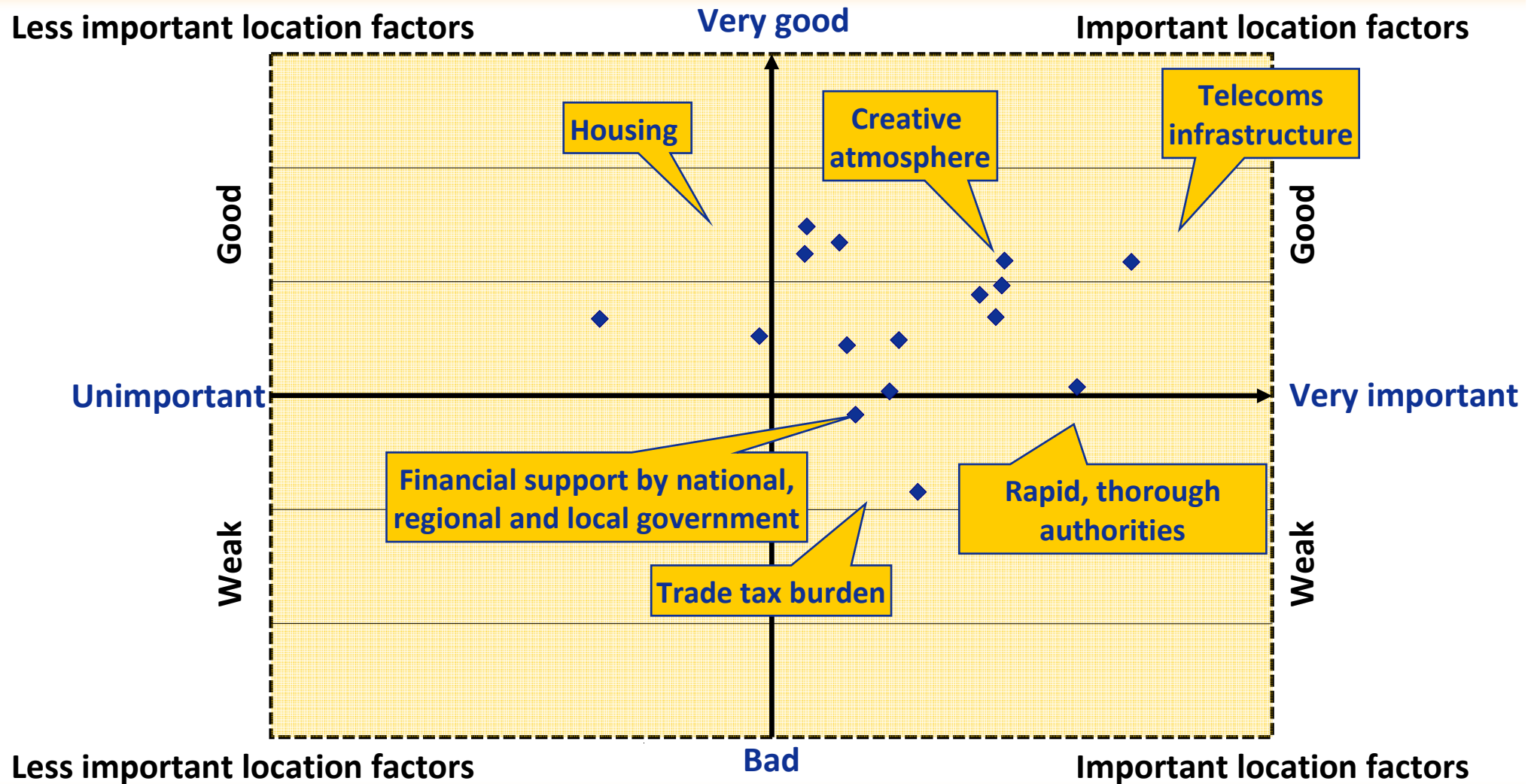
(Statistical sample: n = 733)

|                                                   |             |
|---------------------------------------------------|-------------|
| IT and telecoms                                   | 2002        |
| Newspapers and magazines, printing and publishing | 1992        |
| <b>Media and creative sector</b>                  | <b>1998</b> |
| Telecoms and media sector                         | 1998        |
| Cultural and creative sector                      | 1997        |

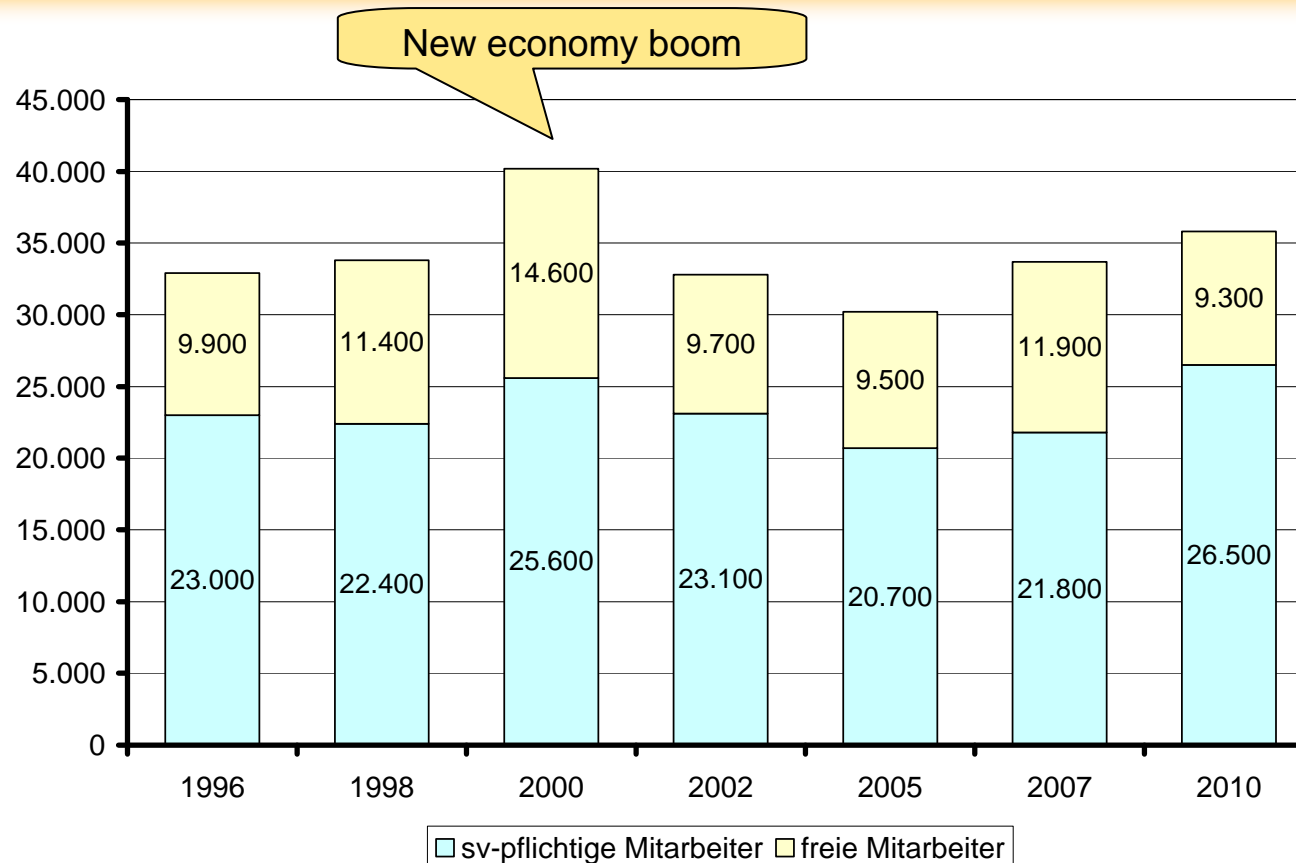


# Significance and quality of various location factors

(Statistical sample:  $n_{\min} = 504$ ; on a scale of 1 to 4)



# Development of employment (only media industry)



Based on our projections.

NB: The figures for 2010 differ from the cluster figures shown earlier because they have been adapted to the segment breakdown of previous studies (only telecoms and media sector including IT).

The downward trend in the number of registered employees beginning in 2000 has been reversed. Over the past three years, more and more permanent jobs have been created. Since trends in contracts for freelancers develop dynamically, the decline between 2007 and 2010 isn't very alarming, especially when seen in connection with the increase in permanent jobs..