

Creating better national cultural statistics with Eurobarometer datasets and ESSNet-Culture technical recommendations

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Problem definition

In the past decade interest for the **Cultural and Creative Industries (CCIs)** has been growing. This reflects a more market-oriented view of culture and the recognition that CCIs have a **bigger** and more **crisis-resilient employment capacity** than previously thought.

Technological change, digital cultural consumption, the inadequacy of traditional economic activity classification for creative value creation call for **new data maps, survey harmonization** and the creation of **better statistics**. Business leaders in the radio and television broadcasting, music and audiovisual industries require **industry reports** to create and execute strategy. Policy makers desire to amend the national GDP, wealth, exports and employment accounts with **Culture Satellite Accounts** and other tools.

Introduction and timeline



The Eurostat working group **ESSNet-Culture** created standards for implementing European cultural surveys that are harmonized across Eurobarometer, SILC Statistics on Income and Living Conditions, AES Adult Education Survey, ESS European Social Survey, EU-ICT, EU Labour Force Survey. This methodological work is giving the framework to design cross-national surveys and data comparison (2012)

The **Statistical Requirements Compendium** adopted the recommendations of the **GNI Task Force on entertainment, literary and artistic originals** (use of collective right management data) and the recommendations of ESSNet-Culture. We are building new statistics in the Croatia, Czech Republic, Hungary, Slovakia on this basis. The Compendium is published annually.

The **European Court of Auditors** found that many of the requirements laid out in the Compendium were not adopted in a number of EU countries. A GDP and national wealth recalculation was needed in Hungary with respect to artistic originals and royalty income. Collective rights management organizations were used as a primary source for official GDP and wealth accounts. Similar work is expected in Croatia, Slovakia and the Czech Republic (2013, 2014)

The Special **Eurobarometer 399 Cultural Access and Participation Survey** (Fieldwork: April – May 2013) carried out an EU28 survey that follows many recommendations of the ESSNet Culture. The survey questions fulfil the 1st and 2nd statistical priorities, and allow for survey design that go in depth in various cultural domains on a national level to 3rd level – i.e. music → recorded music → popular, classical, jazz, folk. (2013)

The **Memorandum of Understanding** to Create a Regional Music Database to Support **Professional National Reporting, Economic Valuation and a Regional Music Study**. This regional cooperation, originally for HU, SK, CR created the basis of the **CEEMID** Central and Eastern European Music Industry Database. Hundreds of indicators are collected for the EEA, EU28, and in-depth to more and more countries. (2014)

The **Hungarian Music Industry Report** (final released May 2015), the **Slovak Music Industry Report** (draft released July 2015), the **Croatian and Czech Music Industry Reports** (to be released later in 2015) and the **Visegrad Region Music Industry Reports** with business and policy recommendations are based on data from national cultural access surveys, career path surveys, collective right management accounts, public granting data and other, formerly not public data sources.

Production: originals, events

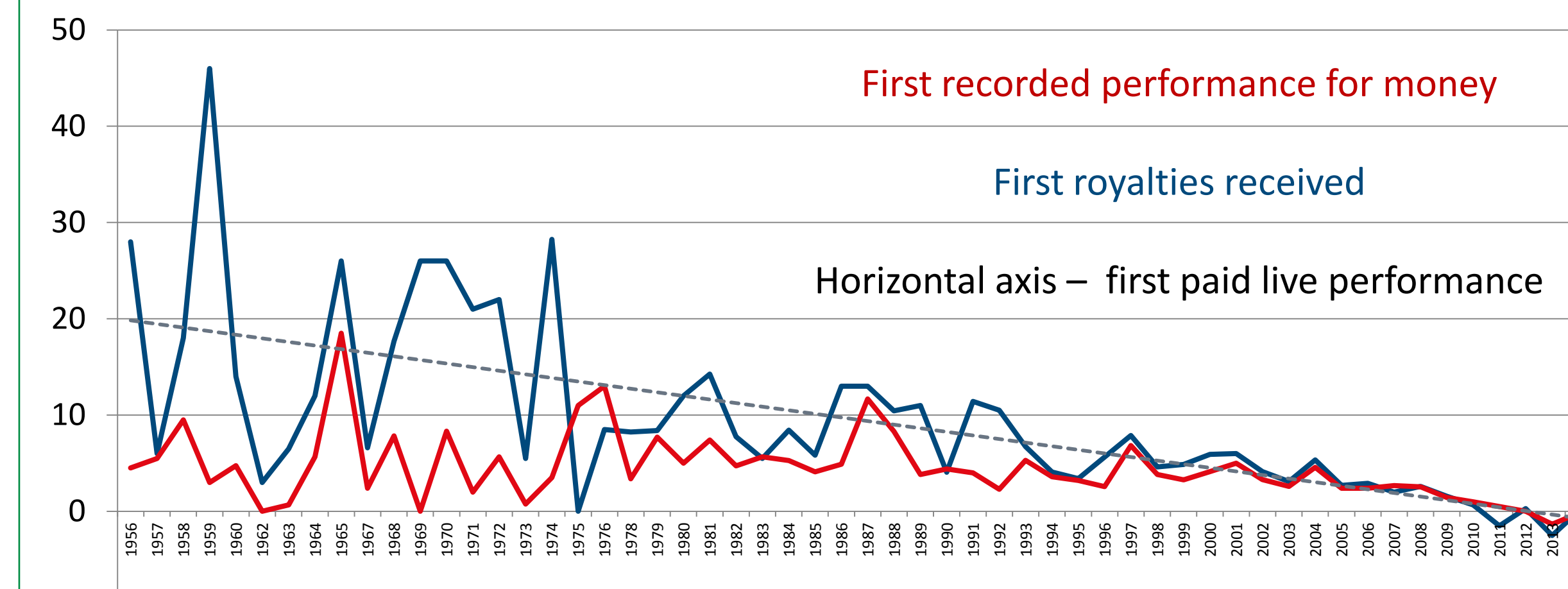


Chart 1. Inversion of roles: recordings are the early stage and live acts are the breadwinners. The changing structure of the music industry from the career paths of Slovak musicians. Collective right management data and career surveys are used to measure production.

Comparable statistics

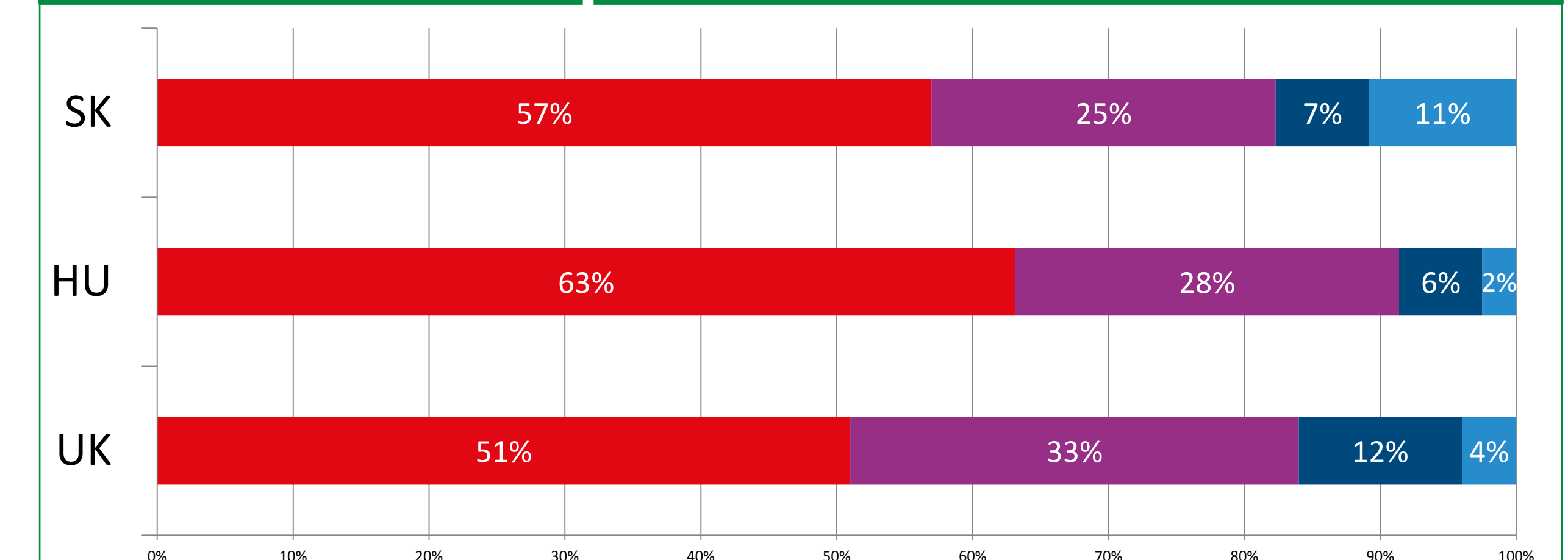


Chart 4. The structure of musician incomes. Comparable statistics for FTE employment calculations are derived from musician surveys and anonymous royalty distribution lists.

Mapping the music industry

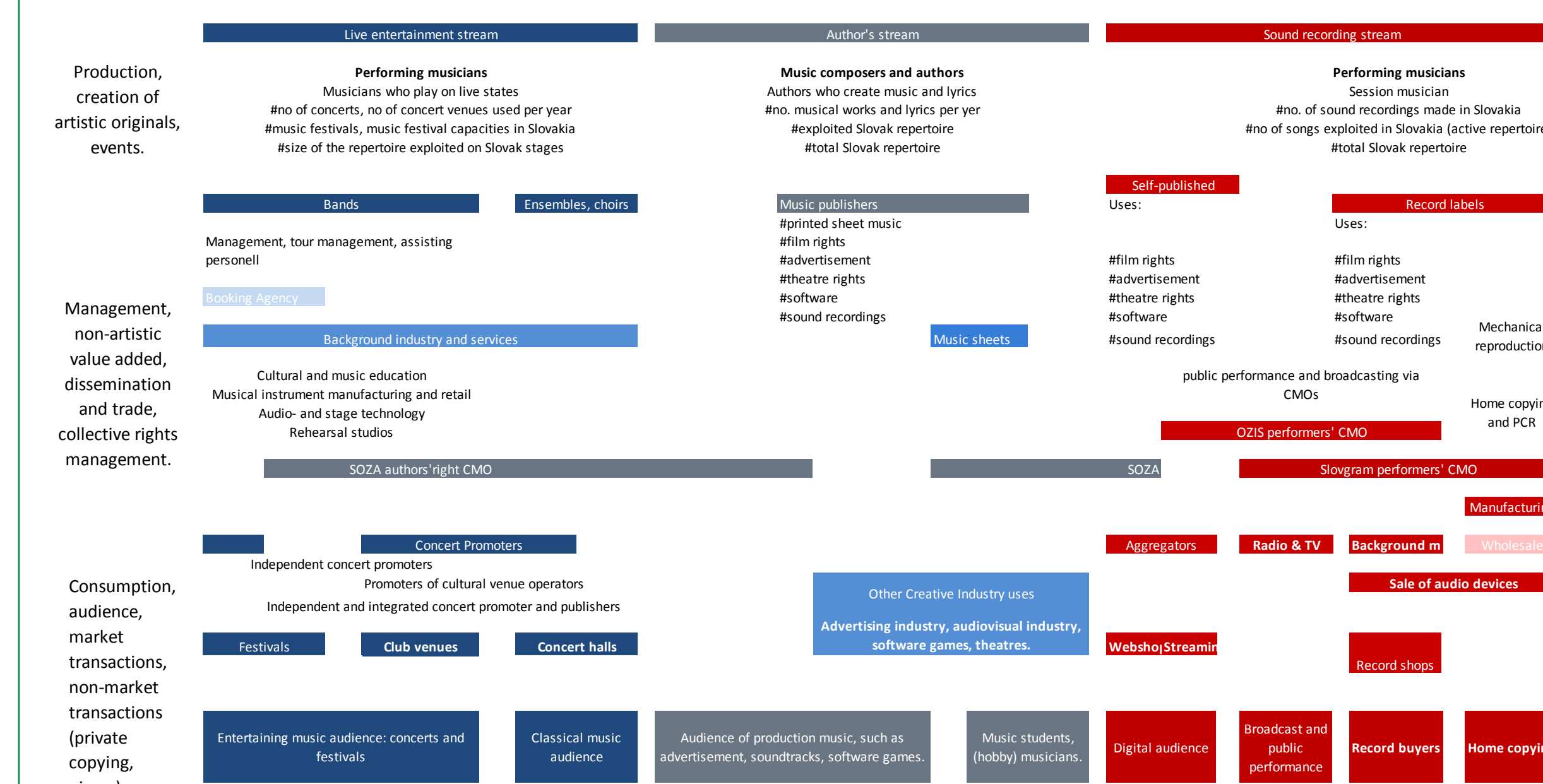


Chart 2. From original works and recordings, through various business activities across many NACE classes we add up value created in cultural market transactions and private copying.

Data analytics for policy and business

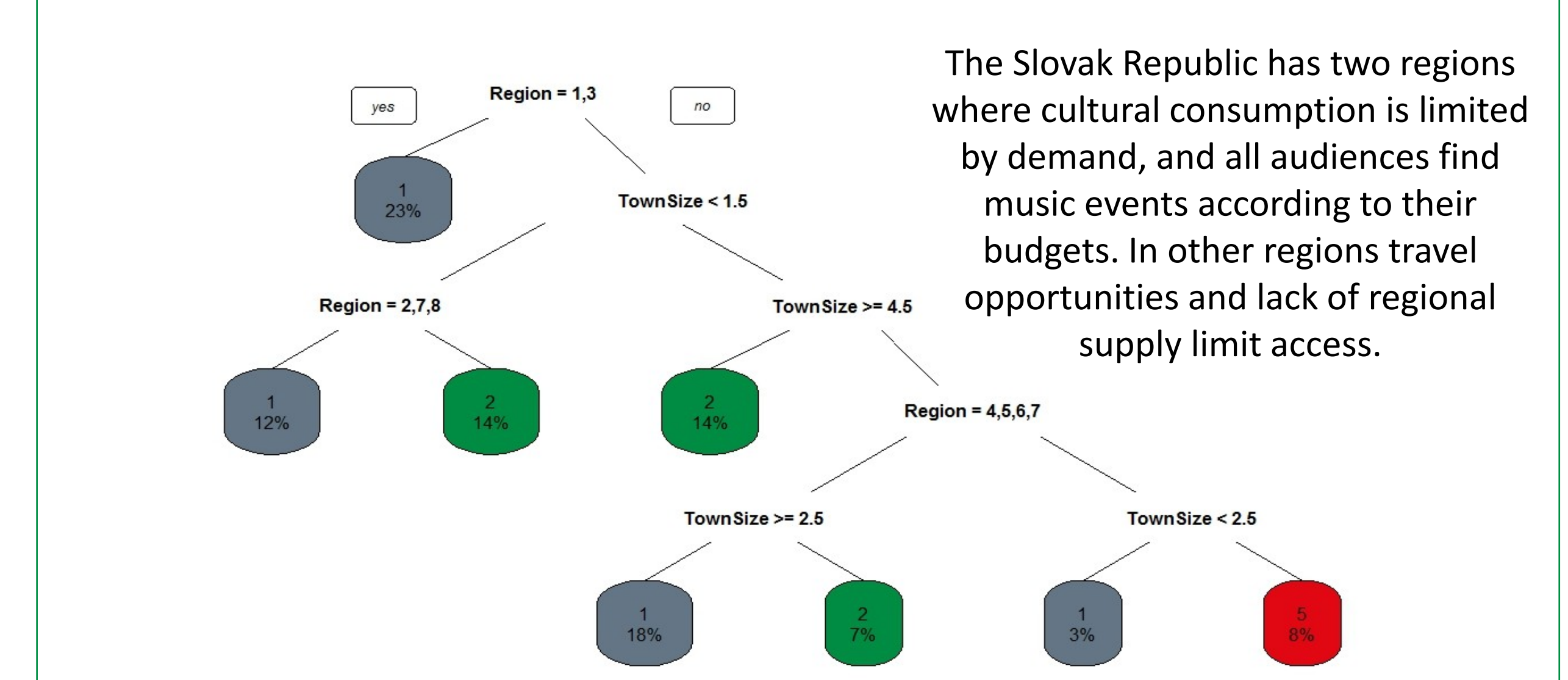


Chart 5. Cultural access and participation in Slovakia: why did not attend (more) concerts? No cultural interest, lack of time, no local supply – CART trees, Random Forest models to understand participation likelihoods. NUTS 3 level regional ex ante evaluation for granting.

Consumption, participation: survey design

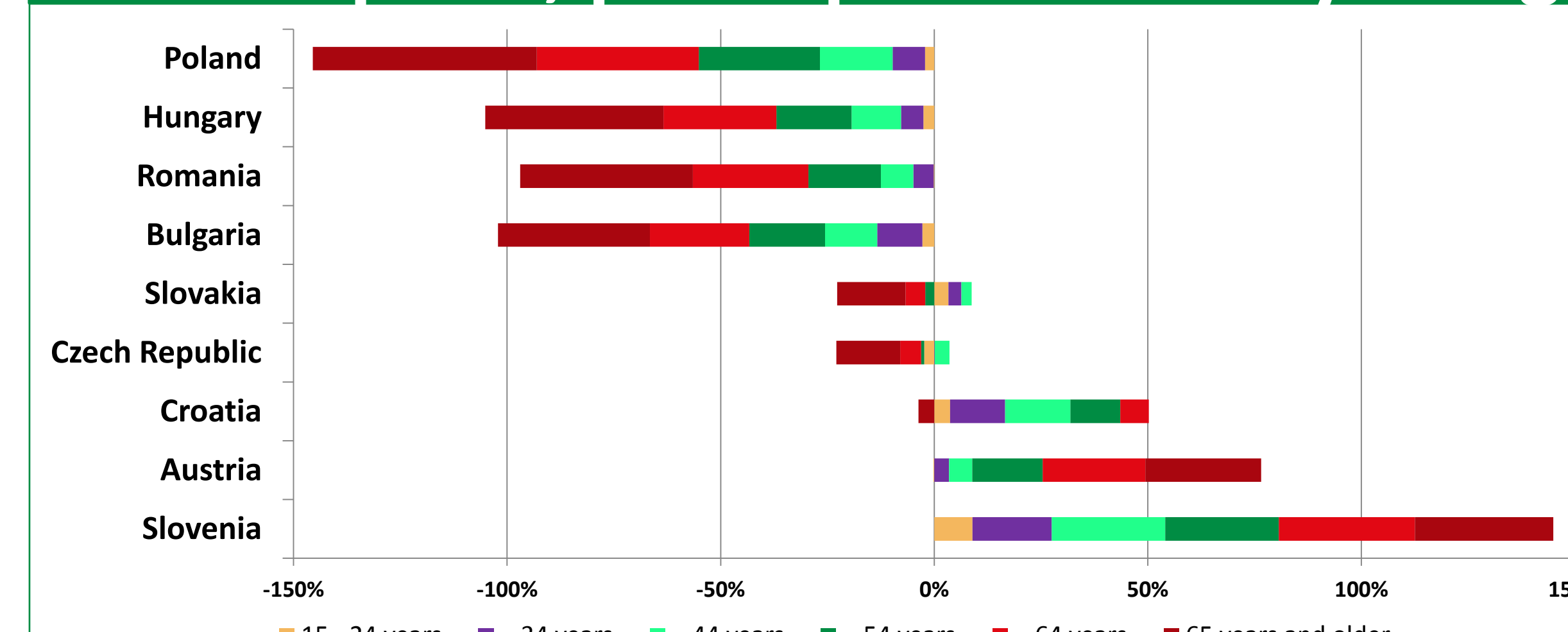


Chart 3. GESIS Eurobarometer archive files are used to design optimal sampling and to compare national results. Eurobarometer standard questions and lower priority/higher detail areas are based on ESSNet-Culture survey instructions for cross-national comparability.

Results and further research

We are creating fact-based business strategy and public policy recommendations. How does the live performance driven music industry work? How can national film industries remain relevant at home? How can we find new input for Cultural Satellite Accounts? How can small language repertoires compete in the vast new global digital streaming market?

Statistics on new forms of culture production, consumption, financing and employment do not have a long history. The absence of time-series increases the value of cross-national and cross-sectional research. Our datasets involve 30 countries and our work involves about 20 institutions. Methodological publications, business and policy research publications for HU, SK, CZ, HR will be published in 2015-2016. We are looking for partners in further countries and in Pan-European research.

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