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ECONOMY

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## CULTURE IMPACTED TO DIFFERENT DEGREES BY THE COVID-19 CRISIS IN THE PARIS REGION

**310,000**

JOB IN THE CULTURAL SECTOR IN 2017

**52 billion**

IN REVENUE GENERATED

**-12%**

DECREASE IN REVENUE OF VENTURES IN THE CULTURAL SECTOR IN 2020 COMPARED TO 2019

IN THE PARIS REGION, ABOUT 310,000 PEOPLE WORK IN THE SECTOR OF CULTURAL ACTIVITIES AND HAVE THEREFORE BEEN POTENTIALLY CONCERNED BY HEALTH RESTRICTIONS DUE TO THE COVID-19 PANDEMIC. MANY CULTURAL AREAS UNDERWENT A VERY HEAVY LOSS OF ACTIVITY DURING THE STRICT LOCKDOWN IN SPRING 2020, BUT SOME RECOVERED BETTER THAN OTHERS: THE BOOK SECTOR ALMOST COMPLETELY RETURNED, IN EARLY 2021, TO ITS PRE-CRISIS LEVEL. INVERSELY, THE LOSS OF ACTIVITY IN 2020 WAS DRAMATIC FOR THE PERFORMING ARTS AND MUSIC, AND PERSISTS IN EARLY 2021.

The Paris region holds a privileged place in the cultural sector: a strong presence of artists, a dynamic and entrepreneurial fabric, a training hub, access to financing and professional networks. In 2017, there were 310,000 jobs in the region, including 147,000 directly linked to a cultural profession (see "Definitions" p. 6). The audiovisual-cinema-multimedia activity is particularly concentrated in the Paris region, with two French jobs out of three in the sector (see graph p. 2). In addition to these 310,000 jobs, 108,000 people are connected to a cultural profession without however working in a sector directly linked to culture: this is the case, for example, of a designer in a textile company, or a performer in a theme park. With in total nearly 420,000 jobs in a sector or a profession connected to culture, the Paris region is the country's leading cultural region, concentrating over four jobs out of ten on the national scale. Nearly 230,000 of these Paris region jobs are located in the capital.

### FREQUENT RECOURSE TO THE SELF-EMPLOYED AND MORE PRECARIOUS EMPLOYMENT CONDITIONS

Out of the 310,000 jobs in the cultural sector, 70,300 are held by the self-employed, constituting 23% of these jobs: a higher proportion than in the economy as a whole (10%). The self-employed in the cultural sector work first of all in the visual arts (design, photography, plastic arts, 59%), but also to a lesser degree in architecture (29%), the performing arts and music (22% each). This form of employment makes it possible to accumulate several activities and to more easily work on a project-by-project basis, but it also brings with it more precarious working conditions. These workers have an average monthly income of €1,853, 40% less than that of all the self-employed



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**“SUSPENDED YEAR” FOR CONTRACT WORKERS**

In the first quarter of 2020, the Paris region had 76,200 contract workers in the audiovisual-cinema-multimedia sector, 47% of whom live in Paris. They generated a total of €365 million in payroll for 15 million hours worked. According to *Pôle emploi*, their activity contracted by 15% compared to the first quarter of 2019. More pronounced for the performing arts, this decline caused decreases in salary for a large proportion of contract workers. A “suspended year” was granted to contract workers whose compensation rights were extended to the end of December 2021.

in the Paris region. This income varies according to the activity sector (from €580 for art teachers to €3,200 in architecture and in advertising) and status (from €533 for micro-entrepreneurs to €3,477 for individual entrepreneurs, managers and liberal professions). A non-wage-earning activity can be combined with a salaried job.

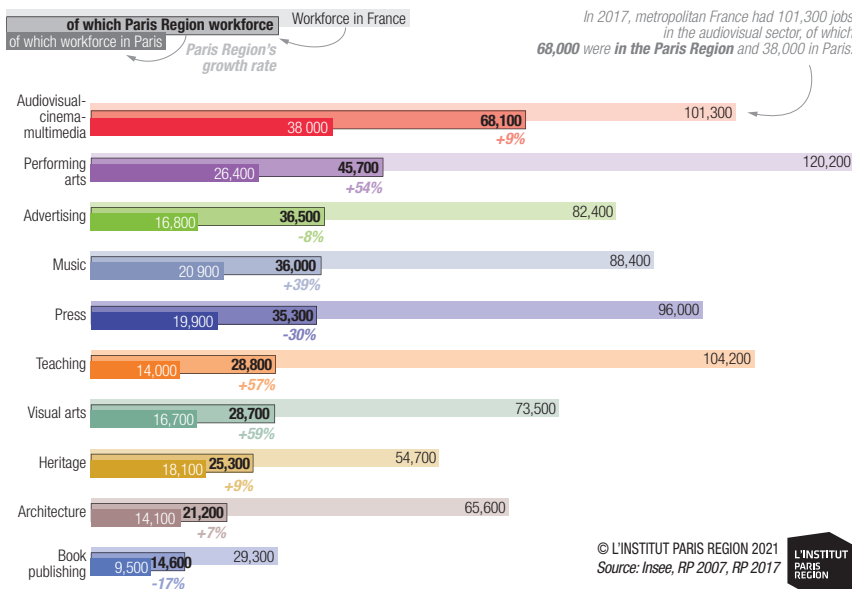
Whether it is salaried or not, one cultural job out of five is not full-time: 22% of workers in the cultural sector have a part-time job (14% for all the working population in the Paris region). In music and the performing arts, which include contract workers (see box left), this proportion is even higher. In the context of the health crisis, part-time work can put professionals in these areas in a vulnerable position, and this despite the financial aid provided by the public administration (see box p. 3).

**A MAJORITY OF QUALIFIED JOBS**

Cultural activities cover a broad range of professions and a great diversity of profiles. With more diplomas than average (57% hold a post-bachelor’s degree, compared to 40% all sectors taken together), workers in this sector also more often hold management-level jobs (51% of jobs, compared to 30% all sectors taken together), notably in architecture (73%) and teaching (65%).

The cultural sector has clearly welcomed an increasing number of women: in 2017, the sector employed almost as many women as men, compared to less than a third in 1991. Nonetheless, in the audiovisual-cinema-multimedia, six working professionals out of ten are men, because of their stronger representation in certain technical professions in show business (producers, directors, sound engineers, etc.). There are more women in publishing, teaching and the heritage field. In the audiovisual-cinema-multimedia sector and advertising, jobs are more frequently held by young people: for example, nearly half of all graphic artists and designers are under 35, as opposed to less than 20% of librarians and curators, professions respectively coming under the book publishing, press and heritage sectors.

**Cultural employment by sector in 2017**



**85% OF CULTURAL JOBS IN THE PARIS REGION ARE LOCATED IN THE GRAND PARIS METROPOLIS (MGP)**

In the Paris region, three quarters of all cultural jobs are concentrated in Paris and the Hauts-de-Seine department whereas these departments represent 48% of all the jobs in the region (see map p. 4). This is due to the historic presence of the book publishing sector in the Latin Quarter (Larousse, Hatier, etc.), museums and cultural institutions along the Seine in Paris (the Louvre, the Musée d’Orsay, the Bibliothèque François-Mitterrand, etc.), audiovisual structures in Paris (for example, the Maison de la Radio), Boulogne-Billancourt and Issy-les-Moulineaux (TF1, Canal+...). Certain locations in the region were driven by public policies: audiovisual structures in the 15th and 16th *arrondissements*

**SUPPORT PLANS ON DIFFERENT LEVELS**

- On the national level, out of the 100 billion euros of the 2020 recovery plan, 2 billion euros were made available to support culture throughout the country; museums and monuments, performing arts, book publishing, audiovisual-cinema-multimedia... This amount complemented emergency measures ("suspended year" for contract workers in the audiovisual-cinema-multimedia and performing arts sectors, partial activities, exoneration from charges and state-guaranteed loans). On the regional level, the state contributed additional aid of 408 million euros in March 2021.
- The Paris Region made available 38.5 million euros for culture: aid to compensate for the loss of box office receipts in the performing arts and for cultural businesses, renovation and protective equipment for the reopening of venues, maintenance of financing, creation of #MonÉtéMaRégion...
- The City of Paris contributed with support of 25.7 million euros for culture: aid for operating and investing in projects, contributions to the State Fund or other structures, exonerations covering rents and occupancy fees in the public domain, organization of "Un été particulier"...

in Paris, contiguous with Boulogne-Billancourt and Issy-les-Moulineaux, studios and technical industries in La Plaine Saint-Denis (Cité du cinema, Louis-Lumière film school, etc.). Other locations benefited from windfall effects (land purchase opportunities, converted brownfields...), especially just northeast of Paris: architecture and advertising firms (BETC in Pantin, for example) and the visual arts, such as video games, most of whose companies are in eastern Paris on the Right Bank and adjoining suburbs, notably in Montreuil. In western Paris, press and advertising companies are also very present in the Triangle d'or business district (Champs-Élysées, Paris 8th arrondissement) and in contiguous suburbs – Clichy and Levallois-Perret (Hachette, Elle International, etc.).

Companies are less concentrated in other sectors. Performing arts venues are found throughout the region but nevertheless are still very numerous in Paris (about 500 private theaters) and, in nearby suburbs, notably in Montreuil, Boulogne-Billancourt and Courbevoie, where there are many public cultural facilities. Movie theaters are more diffuse in the Grand Paris Metropolis.

**A STRONG DROP IN ACTIVITY FOR THE PERFORMING ARTS, LIMITED FOR THE AUDIOVISUAL-CINEMA-MULTIMEDIA SECTOR**

In 2019, in the Paris Region, the global revenue of ventures in the culture sector was nearly 52 billion euros (see "Definitions" p. 6). In 2020, because of restrictions due to the health crisis, this revenue plummeted by almost 12%, a decline similar to that observed nationwide. The volume of hours paid

decreased by 11% in the Paris region between 2019 and 2020, compared to -9.5% on the national level. The decrease in revenue varied according to the sectors: -43% in the performing arts, -28% in music, -13% in heritage, but only -5% in audiovisual-cinema-multimedia and -4.5% in book publishing (see graph lower left).

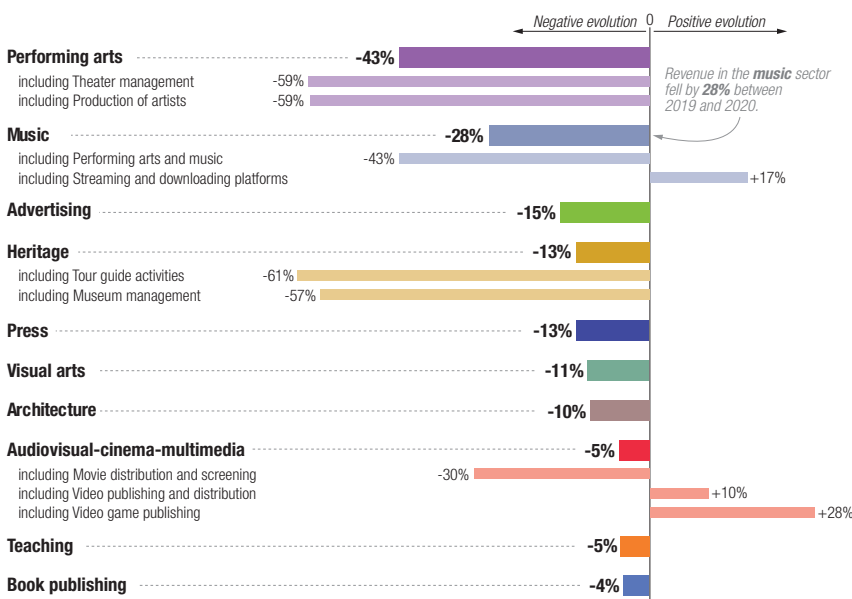
Depending on the dominant activities in the region's geographic sectors, the health crisis had a greater or lesser impact on local employment. In the Seine-Saint-Denis department, where the performing arts, music and visual arts – greatly restricted by health regulations – are the main cultural sectors, the volume of hours paid declined by 18%. Inversely, in the Hauts-de-Seine department, this drop was only 9% because the predominant cultural activities (audiovisual and advertising) were less affected by the crisis. In Paris, the loss of activity was about 12%.

**VIDEO GAMES, STREAMING PLATFORMS AND NEWS SERVICES BOOSTED BY THE CRISIS**

In 2020 and early 2021, the health crisis and the various lockdowns sped up the development of certain sectors. This was notably the case for cultural products "consumed" at home, like the video game: in 2020, the revenue in this area generated by regional companies (1.7 billion euros) leapt by 28% compared to 2019. Video publishing and distribution (+10%) and streaming and downloading platforms (+17%) also grew whereas music publishing (-4%) and retail sales of albums (-5%) limited loss thanks to end-of-the-year purchases.

The health situation also increased the public's need for information. Activities involving news services, journalists, photographers, press agencies and radio broadcasting remained stable, and even grew slightly in 2020.

**Evolution of revenue by cultural sector between 2019 and 2020**



**BOOK PUBLISHING AND FILM PRODUCTION RECOVERED AFTER THE FIRST LOCKDOWN**

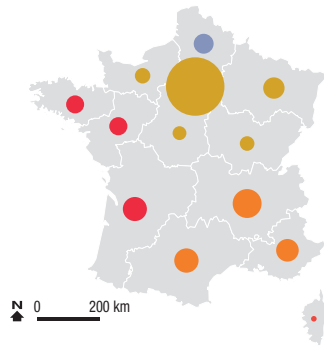
Other areas of activity were particularly impacted by the spring 2020 lockdown, but subsequently recovered. Among them, book publishing and the press benefited from the designation in February 2021 of bookstores among "essential" services.

Likewise, thanks to the adaptation of shooting conditions, the cinema sector (TV channel publishing, film production and postproduction) was able to maintain its activity (about 14 billion euros in revenue in 2019 in the Paris region). Despite their total shutdown during the strict lockdown in spring 2020 and the absence of foreign productions due to closed borders, in 2020, Paris welcomed the shootings of 93 feature-length films, 64 series and 223 commercials, almost as many as in 2019. Inversely, downstream of the sector, the distribution and screening of movies met with more roadblocks, with a 30% loss in revenue and 14% of the volume of hours paid in 2020.

# THE PARIS REGION, THE LEADING CULTURAL REGION IN FRANCE

## Volume and orientation of cultural employment by commune and Paris arrondissement in the Paris Region

### Cultural jobs in France, workforce and evolution

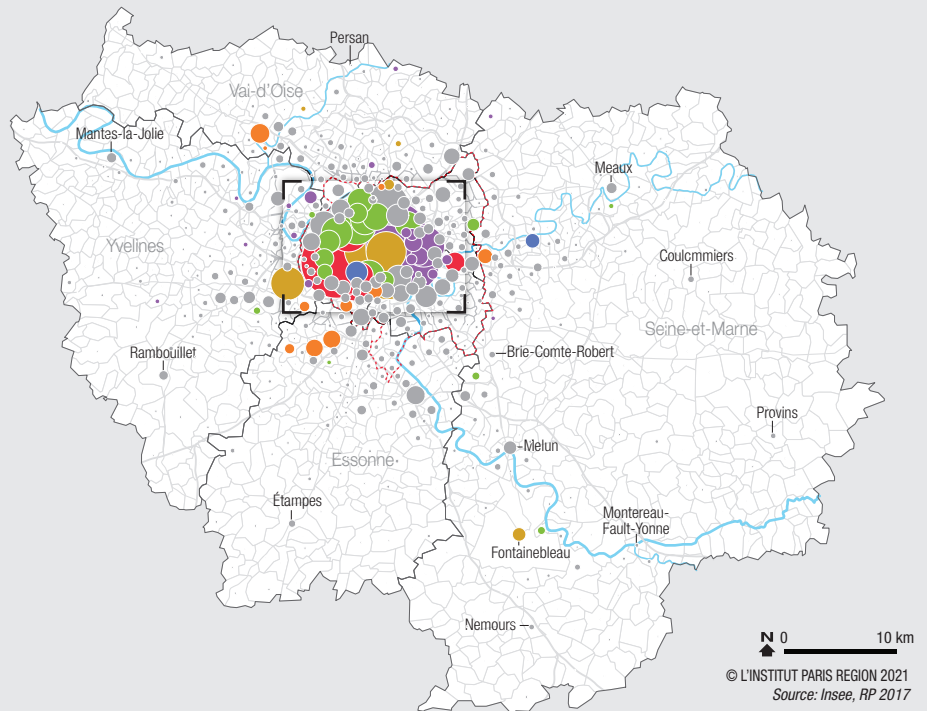


**Number of cultural jobs in 2017**  
Total France: **747,000**

**Evolution of jobs between 2007 and 2017 (in %)**  
Evolution France: +10.7%

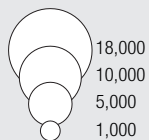
300,000	> 20
75,000	11 to 20
10,000	0 to 10
	< 0

© L'INSTITUT PARIS REGION, Insee ÎDF, 2021  
Sources: Insee, RP 2007, RP 2017



© L'INSTITUT PARIS REGION 2021  
Source: Insee, RP 2017

### Number of cultural jobs in 2017



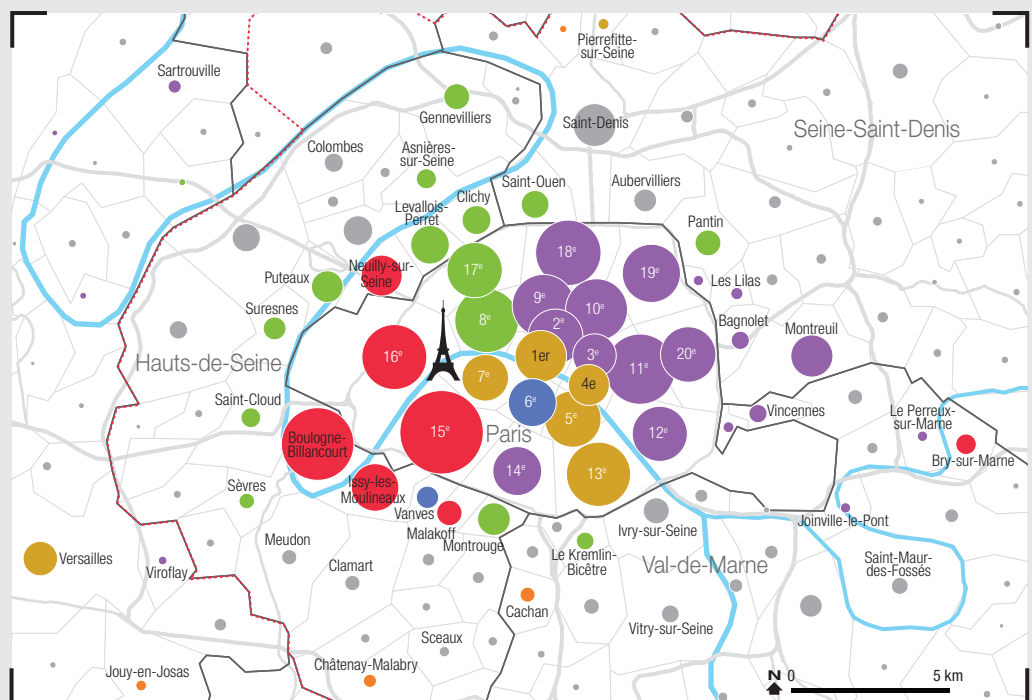
### Dominant orientation of cultural employment

- Audiovisual-cinema-multimedia
- Advertising, Press
- Teaching\*
- Book publishing
- Heritage
- Visual arts, Architecture, Performing arts
- Non-specific\*\*

The orientation of cultural employment (indicated by the circle's color) is determined by means of a typology based on a principal component analysis whose variable is the share of cultural employment by sector in total employment.

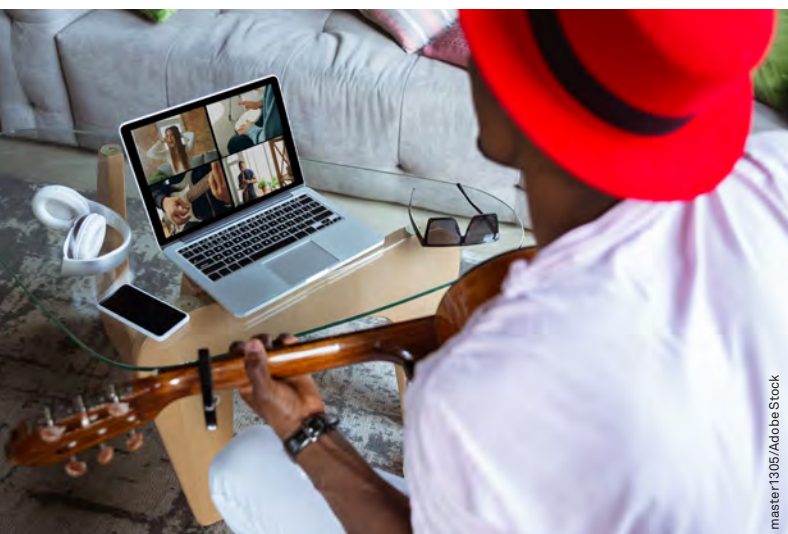
### Base map

- main road network
- main water system
- Grand Paris Metropolis (MGP) boundary
- departmental border
- communal border



\* By construction, the "Teaching" sector brings together cultural teaching as a whole but also a segment of higher education, which explains that prestigious universities, notably located in the southern part of Paris are included in this cultural employment typology.

\*\* A "non-specific" orientation means that no sector is particularly distinguished in the cultural employment of the commune concerned.



### PERFORMING ARTS, MUSIC, GUIDES... STRONGLY IMPACTED ACTIVITIES

The restrictions on gatherings and the absence of the international clientele also had a great impact on the organization of festivals, and more generally, the performing arts sector. Activities involving the production of artists and theater and concert hall management also dropped by 59% in 2020 and the volume of hours paid was slashed by a third in 2020 (see graph opposite/see graph lower right). In this sector in which there are many self-employed workers and contract workers, the decrease in activity is difficult to measure.

### MUSEUMS AND HERITAGE: A PARTICULAR CASE

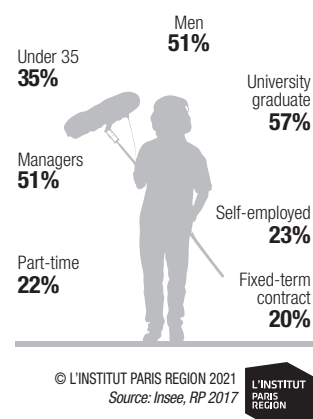
In the heavily subsidized areas in the public sector, such as the management of museums and historic sites and monuments, the loss of activity can be gauged by their attendance. Between March 2020 and May 2021, these cultural structures were closed for more than 11 months. In the City of Paris museums, the number of admissions fell in 2020 by 52% for temporary exhibitions and 55% for permanent collections. The revenue of art galleries decreased to a lesser extent (-20%) as the periods during which they were closed were shorter and they could serve as an alternative for museum-goers.

Through its unprecedented scope, its intensity and its duration, the Covid-19 crisis put the professionals and jobs in the culture sector at risk for the entire period. The cancellation of tours of certain shows, the continuation of health measures and the weakening of the demand have led to a slow recovery for the performing arts (music, theater, dance, circus and street arts) and the cinema. The cancellation of certain exhibitions and the great dependence on the recovery of the tourist industry meant that a heavy risk weighed on the museums' activity.

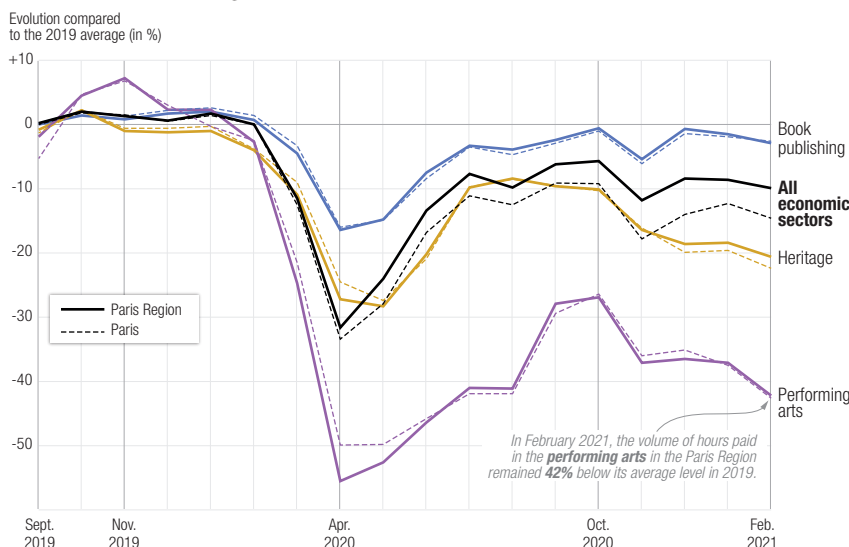
The development of an online cultural offering helped certain professionals to maintain an activity, even generate revenue during this

transitory period. However, this development only concerned a limited number of actors, taking into account the major investment costs that it involves. During the entire crisis period, the cultural sector benefited from support plans implemented by the federal government, the Paris Region and other administrations. This aid helped to compensate for the total or partial loss of revenue. The in-depth transformations that the cultural sector has undergone, the value transfers and the concentration phenomena that they caused exposed and weakened creators and artists, whose production is the raw material of every cultural field. The promotion of new dissemination methods – streaming, for example – is a major stake in the sharing of value in the cultural sector, between the large digital platforms and the content creators and artists (copyright and the remuneration of artists

### Typical profile of the cultural worker



### Evolution of the volume of hours paid compared to the 2019 average



in the digital era). Culture is essential for social cohesion and the well-being of each individual. It brought citizens closer together, providing comfort, inspiration and hope, during this period of uncertainty. Will the talents and the public heed the call when venues physically open? ■

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## DEFINITIONS

The counting of salaried jobs and the self-employed is based on the **2017 population census**.

The **economic scope of culture** was defined by the Statistics Department of the Ministry of Culture, based on a European grid adapted in the context of the Covid-19 pandemic in order to more specifically target the activities impacted by the health crisis. It is mainly based on the French activity nomenclature NAF Rév 2 of the Insee. As a complement to this approach, cultural employment can be defined as a group of activities derived from the nomenclatures of professions and socio-professional categories. An approach by activity was selected in this *Note rapide*.

**Cultural activities** are grouped under 10 sub-sectors: advertising, architecture, audiovisual-cinema-multimedia, book publishing, heritage, music, performing arts, press, teaching and visual arts. The music segment of the performing arts (30,300 jobs in the Paris region) is included in both the music and performing arts categories, but they are not counted twice in the employment total.

In the mapping, the orientation of each commune was determined using a principal component analysis based on the portion of each of the cultural sectors in the employment total. A **hierarchical ascending classification** subsequently made it possible to draw up a typology of the communes in order to determine their orientation in one of the 10 in one of the 10 sub-sectors defined.

The **revenue** per sector was estimated based on a fiscal source, the **CA3** form, which company must fill out to pay taxes on added-value every month or quarter. This estimate was made on the scope of regional companies, that is, those for which at least 80% of the payroll is located in the Paris Region.

The **volumes of hours paid** were calculated based on nominative social declarations.

The **income of the self-employed** was estimated using the self-employed base of the Insee which made it possible to analyze the profile of the self-employed and their income levels by detailed activity sector and at an infra-national level (the commune in which the activity takes place being known).

The jobs of **contract workers in the performing arts** fall under "standard" fixed-term contracts given to artists and technicians in this sector. These contracts permit them to alternate periods of work and periods of non-activity for which they receive unemployment benefits.

## RESOURCES

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  - Unesco, Economic Impact Outlook on The Creative Industries, June 2021.
  - World Cities Culture Report, World Cities Culture Forum, 2018.
- Creative Economy section:**  
analyses, debates, events, studies and publications, interactive maps.

### Web annexes

- nomenclatures of cultural activities and professions;
- complementary data

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