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MAPPING THE CULTURAL INDUSTRIES: THE EXAMPLE OF THE PARIS REGION

300,000

CULTURAL JOBS ARE CONCENTRATED IN THE PARIS REGION.

21 billion

EUROS WORTH OF CULTURAL WEALTH IS GENERATED ANNUALLY IN THE PARIS REGION.

45%

OF THE NATIONAL CULTURAL WORKFORCE.

FOR MAJOR METROPOLITAN AREAS, CULTURE IS A STRATEGIC DRIVING-FORCE BEHIND THEIR DEVELOPMENT. IN THIS REGARD, THE PARIS REGION IS PARTICULARLY WELL ENDOWED: IT ACCOUNTS FOR 45% OF TOTAL NATIONAL CULTURAL EMPLOYMENT AND BENEFITS FROM A VERY RICH CULTURAL ECOSYSTEM, WHICH ENABLES IT TO STAND OUT FROM THE COMPETITION, NOTABLY IN THE AUDIOVISUAL-CINEMA-MULTIMEDIA SECTOR. HOWEVER, ALTHOUGH THIS SECTOR IS FLOURISHING, THE PROFESSIONALS WHO WORK IN IT COMBINE SEVERAL ACTIVITIES AND ARE IN UNTYPICAL FORMS OF EMPLOYMENT.

Culture is undoubtedly a powerful factor in making metropolitan areas attractive in France and across the world, as well as being a driver of economic development and spatial planning. The Paris Region is characterised by a high consumption of culture, which alone accounts for 61% of the total value added generated by French cultural institutions amounting to 21 billion euros. This economic wealth of this field of activity puts the Paris Region on a par with other major global metropolitan areas, such as London or New York. In Paris as well as London, the five largest museums attract between 20 and 25 million visitors a year. However, the French capital region is much more than a “museum city” because its audiovisual-cinema-multimedia sector, among others, is also very dynamic.

According to the latest population census (see data box on p. 6), the cultural sector in the Paris Region represents 300,000 jobs, *i.e.* 5.3% of the total number of jobs in the region compared with 2.6% at national level. In mainland France, 45% of the jobs in this sector are in the Paris Region, compared with 21% in all the other economic sectors combined. This means the Paris Region is number one, far ahead of regions such as Auvergne-Rhône-Alpes (10%), Occitania, Nouvelle Aquitaine and PACA (7%) (see maps on page 4).

The Paris Region benefits from a favourable ecosystem featuring a talented workforce, a dynamic entrepreneurial fabric, training centres and access to funding, events and professional networks. The capital region has four out of 10 cultural jobs *i.e.* twice as many as for the whole of France. This concentration is notably due to the historic establishment of media, heritage (museums, libraries, national monuments) and publishing businesses in Paris and its inner suburbs, as well as to the strong presence in Paris of performing arts companies.





1. and 2.: performing artists represent a multitude of professions all characterised by great employment flexibility (short-term contracts, part-time jobs, multiple activities), generally as part of the temporary work (“intermittent”) system of employment.

CULTURAL ACTIVITIES BUOYED BY THE AUDIOVISUAL, CINEMA AND MULTIMEDIA SECTOR

Within the cultural sector, the Paris Region is unique in terms of the strong presence of film, audiovisual (radio + TV) and multimedia activities, which account for 67% of jobs and three quarters of the wealth generated. This predominance is due to the presence of major radio and TV channels and of film and TV production companies. The region also hosts 46% of national staff dedicated to heritage activities and libraries (mainly assigned to managing libraries, museums and historic monuments) as well as 44% of jobs related to advertising and 42% of jobs related to print publishing.

A more dynamic sector than the others in the Paris Region

Between 2008 and 2013, the number of jobs in the Paris Region’s culture sector increased twice as

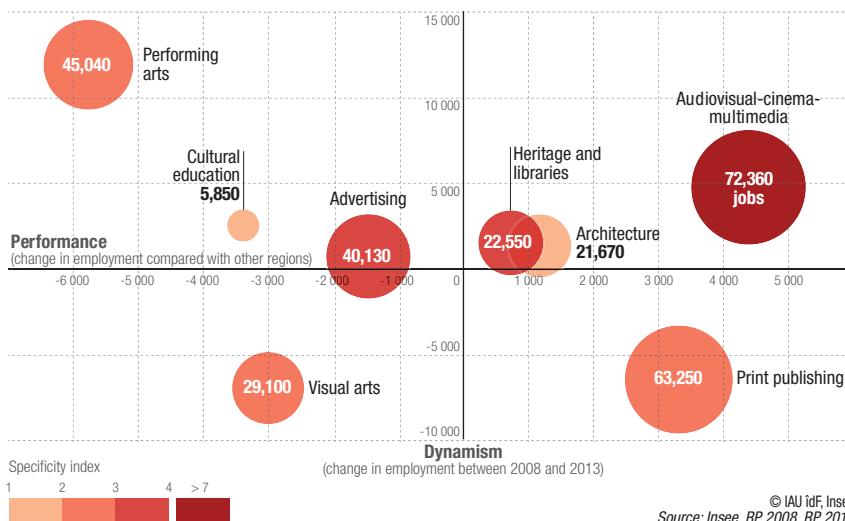
fast as in the other sectors (+3.3% compared with +1.4%, a gain of 9,600 jobs). Over this period, the weight of the Paris Region in terms of employment in the national cultural sector remained rather stable, but with different trends depending on the fields of activity (see figure 1). The capital region reinforced its position in relation to the other French regions in the audiovisual-cinema-multimedia sector, particularly in:

- electronic games publishing;
- film production for cinema and television;
- the production of general-interest TV channels.

In the heritage and libraries fields, the weight of the culture sector has been increasing in library management, while decreasing in museum management.

The Paris Region has lost some ground in the visual arts sector, whereas the number of jobs has been rising in the other regions, notably in specialised activities such as design and visual arts creation.

1. The audiovisual-cinema-multimedia sector: a dynamic industry specific to the Paris Region
Distribution of jobs by cultural sector and the trend between 2008 and 2013



Interpretation: the size of each bubble is proportional to the employment level in different parts of the Paris Region in 2013 (see the definition of the specificity index on p.6). The dynamism of each sector in measured in terms of variations in employment between 2008 and 2013. During this period, in the Paris Region, the audiovisual-cinema-multimedia sector gained 4,800 jobs, making it one of the best-performing regions of France. The Paris Region surpassed the others by 4,400 jobs.

An economic fabric made up of self-employed workers and a few large groups

The Paris Region has 36% of all French cultural institutions, i.e. 161,000 establishments whose main activity relates to the culture sector. In the Paris Region as in the others, nearly 90% of such establishments have no salaried staff (compared with three out of four across all sectors as a whole). The personnel are self-employed, including artists, cultural entrepreneurs or self-employed professionals (such as architects, etc.). The self-employed often opt for the status of “micro-entrepreneur”: 65% of the ventures established in 2016 in the culture sector had this status, compared with 47% in the rest of the economy. In addition to these small businesses, the capital region is home to 54% of French cultural institutions that employ over 50 workers. These notably include leading companies in all culture-related sectors, such as: The Paris National Opera for performing arts; France Télévisions, Radio France, Canal+,

CULTURE: A REGIONAL COMPETENCY

With a 93-million-euro budget dedicated to culture in 2016, the Regional Council of the Paris Region aims to meet two main objectives: first, to foster the emergence of talented people; and second, to make culture accessible to everybody in the region. It supports artists and all forms of cultural practices: performing arts, visual arts, digital arts, the cinema, books (support for bookshops and independent publishers, etc), today's music (support for concert halls, events, etc.) and heritage assets. Benefiting from the fact that 50% of French films are shot in the Paris Region, the Regional Council of the Paris Region increased its support for the cinema and audiovisual sector in 2017. It allocates a 20-million-euro budget to cinema and television production, but also to festivals, script-writers, and cinemas.

etc. for public sector broadcasting and major TV channels and radio stations; the French National Library and the Louvre Museum for the "heritage and libraries" fields; Publicis and Havas in advertising; as well as Ubisoft and Blizzard Entertainment in video games.

A SHARP INCREASE IN THE WORKFORCE, WITH UNTYPICAL FORMS OF EMPLOYMENT

The culture sector is partially detached from the cultural professions. In fact, only half of the 300,000 people who work in this sector are cultural professionals (see figures 2 and 3), which is slightly more than the average observed at national level (45%). The other half are in cross-cutting or transversal job positions, such as senior administrative and financial officers. Conversely, 100,000 cultural jobs exist in sectors other than culture, such as, for example, designers in the automotive industry.

The staff employed in the cultural professions are mostly executives and qualified workers. In the Paris Region, 68% are higher education graduates, compared with only 48% in all other professions. However, depending on the profession, the profiles are diverse in terms of gender and age. Two-thirds of all architects or technical and artistic show-business professionals are male, whereas three quarters of document management, conservation and archiving professionals are women. Moreover, nearly half of all graphic designers are aged under 35, compared with less than 20% of librarians, archivists and curators. These professions have increased significantly over the last 20 years across the whole of France. Between 2008 and 2013 in the Paris Region, this trend was less marked (+6.5% compared with +8.9% at national level). The most widespread cultural profession is that of designer or technical assistant in graphic arts, fashion and decoration (graphic artist, designer, stylist, interior designer, etc.), which represents about 16% of cultural professionals.

Journalists are over-represented in the Paris Region (11% of the cultural workforce, *i.e.* 1.6 times more than in the other regions).

Between 2008 and 2013, technical and artistic staff in the audiovisual and entertainment sector (producers, directors, sound engineers, etc.) increased by 1/3 in the Paris Region, in which they are highly concentrated (61% of the national workforce).

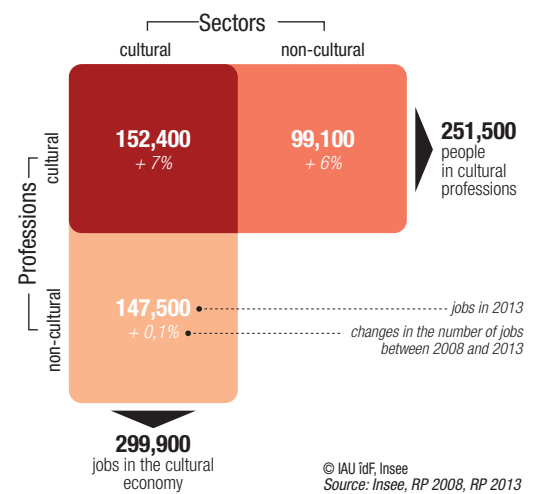
By contrast, there are proportionally twice as few art teachers in the Paris Region as in the rest of France.

A key feature of the cultural sector:

one third of workers are self-employed

One third of economically active people in the cultural sector are self-employed (*i.e.* non-wage-earning), 3.4 times more than for all the other professions combined. This proportion is slightly higher than at national level (28%). Half of them are micro-entrepreneurs, notably music and dance teachers as well as photographers.

2. More than 152,000 jobs straddling the cultural sectors and professions (trident)



Their monthly taxable income amounts to 1,800 euros on average, *i.e.* 300 euros more than at national level. This varies from 410 euros for microentrepreneurs to 3,100 euros for traditional entrepreneurs. People frequently combine a non-wage-earning activity with a wage-earning job: this is the case of 39% of self-employed workers in the Paris Region, *i.e.* slightly more than at national level (36%), notably micro-entrepreneurs actively involved in cultural education (72%), the performing arts (67%) and the audiovisual-cinema-multimedia sector (66%).

Salaried jobs in the cultural sector are often insecure

The level of activity in the cultural sector is subject to fluctuations, being often project-based. This results in a multiplicity of employers and alternating periods of employment and unemployment, notably in the case of artists and technicians in the performing arts.

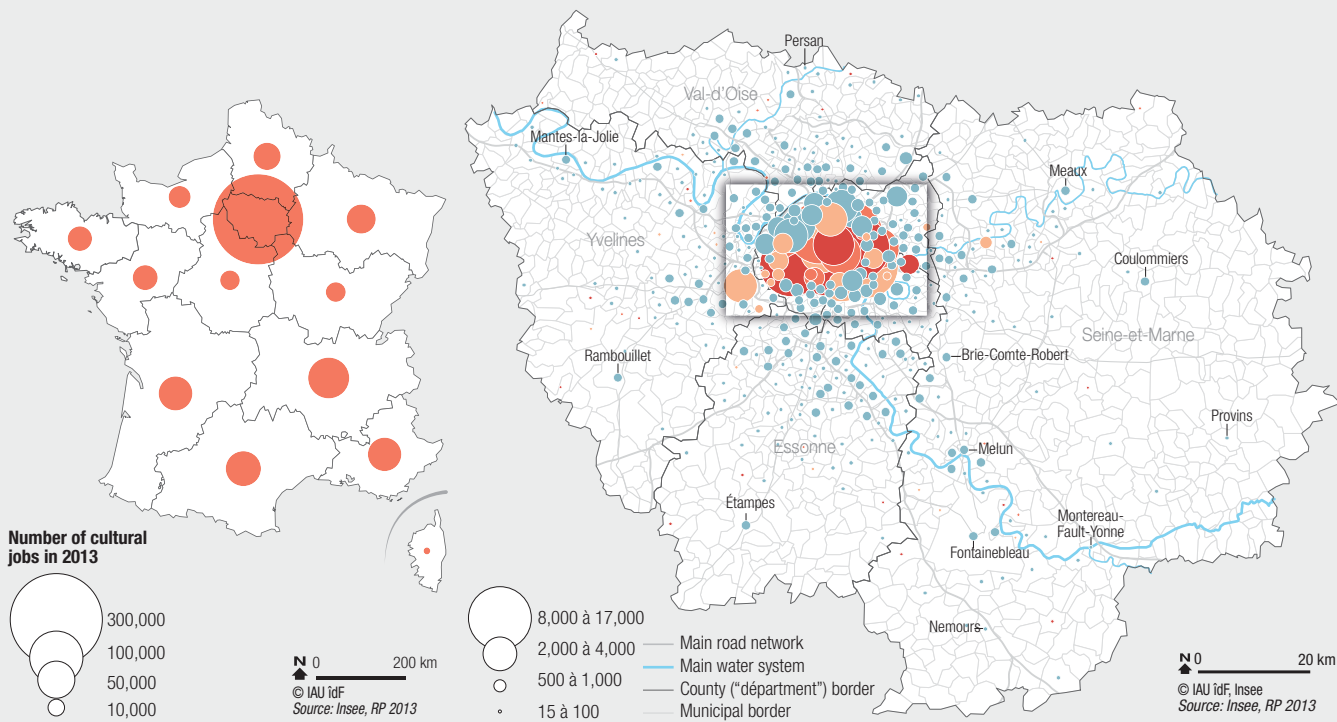
The unemployment insurance scheme applicable to performing arts contract workers is designed to meet these specific characteristics, thereby providing artists and technicians with relatively stable streams of earned income. According to Audiens, the French social welfare group, in 2014 the Paris Region had 183,000 contract workers in the audiovisual and performing arts sector. Jobs with low hourly volumes of work are common in the cultural professions: 61% of contracts are for less than 100 hours a year, compared with 22% in all other professions. Such contracts are a little more frequent in the Paris Region compared with France as a whole, notably in the print media and in arts education.

The Paris Region is home to the most important performing arts companies in the country (Opéra de Paris, Comédie française). In spite of this, only 16% of the jobs are stable (*i.e.* permanent contracts or civil service positions), compared with 71% for all professions in the Paris Region. For performing arts

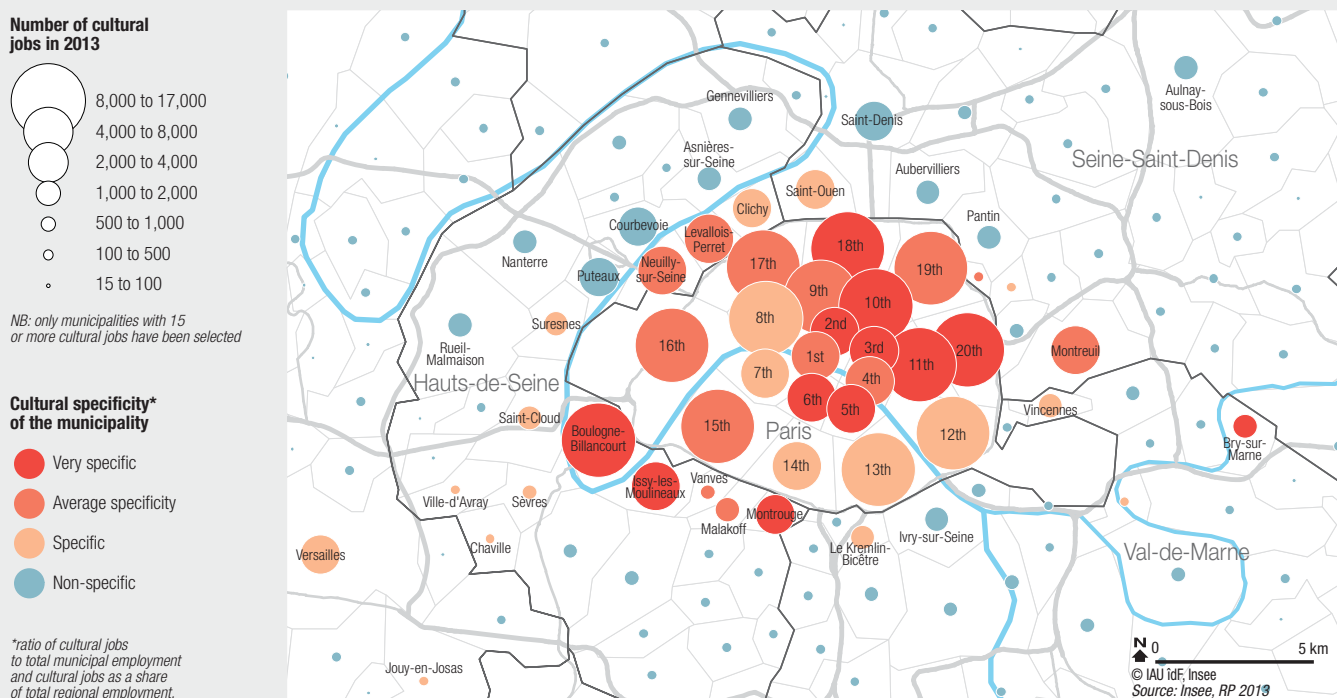


SURFACE AREA: **12,012 KM²**
12 MILLION INHABITANTS
18% FRANCE'S POPULATION
6.2 MILLION JOBS

The Paris Region: France's top cultural region



A key feature at the heart of the Paris metropolitan area ("arrondissements")





workers, this proportion reaches 2%, i.e. even less than at national level (3%). In fact, cultural activities often operate according to a project-based logic: teams are formed for the shooting of a film, the performance of a play or for a music tour. Consequently, multiple activities (at least two jobs in a year) are frequent (44% in the Paris Region compared with 26% in all professions as a whole). On average, performing arts professionals hold 4.3 jobs per year.

This intermittent professional activity is also due to the seasonality of jobs, notably in the performing arts, audiovisual and cinema sectors, where the number of jobs is subject to sharp infra-annual fluctuations. For example, in the Paris Region the level of activity is lower in January and December. All performing arts professionals are affected by these fluctuations, especially artists and technicians whose number under contract may vary more or less by 35,000, depending on the month. However, seasonality is less prevalent in the Paris Region than in other regions, where activities are more concentrated during summer festivals.

SECTORIAL SPECIFICITIES THAT SHAPE MANY DIFFERENT GEOGRAPHICAL AREAS

In the Paris Region, three quarters of cultural jobs are concentrated in Paris (57% of the cultural

workforce) and the Hauts-de-Seine “département” (19%) (see maps on p. 4). The choice of these locations is due to historical factors including local policy initiatives or windfall effects (land opportunities, redeveloped brownfield sites). The analysis of the location of cultural jobs in terms of field of activity reveals certain territorial specificities:

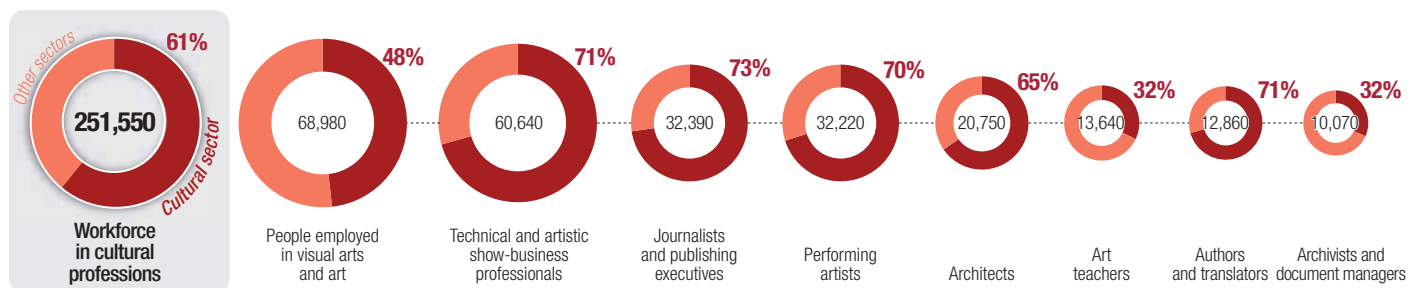
- **print publishing** remains very Paris-centred. The book-publishing cluster has remained in its historic location in the 6th district of Paris and extends as far as Montrouge. Newspaper publishing is concentrated in two hubs: one extends from the 2nd district of Paris to Levallois-Perret, while magazines are concentrated in the 15th district, in Issy-les-Moulineaux and Boulogne-Billancourt;
- The **audiovisual-cinema-multimedia sector** is multipolar. It is concentrated mainly in the 8th, 15th and 16th districts of Paris, extending across Boulogne, Issy-les-Moulineaux and Neuilly-sur-Seine. Two other hubs dedicated to studios and technical industries are located in Plaine Saint-Denis and around Joinville-le-Pont, Bry-sur-Marne and Montreuil. However, cinemas are quite well spread out across the region’s densely urbanised area;

3. Graphic and web designers, often freelance or “microentrepreneurs”, form part of the new cultural professions that benefit from the development of the internet and multimedia sectors. They are very different from heritage-related professions, which are often occupied by more elderly citizens and provide more stable jobs (87% of job positions involve permanent contracts).

4. The technical professions that support artistic activities tend to be restructuring and professionalising more than before, notably due to the development of very sophisticated technologies.

3. In the Paris Region, six cultural professionals out of 10 work in the cultural sector

The weight of cultural professions (as %) according to the sector of activity



Interpretation: 52% of the 68,980 professionals in visual arts and art occupations work in a non-cultural sector.

- **artistic creation**, featuring the performing and visual arts (design, photography, etc.), is more diffuse in spite of its very great presence in the Paris area due to the concentration of private theatres or performance halls. These activities also prosper in the inner suburbs, notably in Montreuil, Boulogne-Billancourt and Courbevoie, where the supply of public cultural amenities is abundant;
- **advertising** is concentrated near its clients' decision-making centres: the first hub is in the Paris golden triangle, linked with Levallois-Perret, Neuilly-sur-Seine and la Défense. A second hub is in Boulogne-Billancourt and Issy-les-Moulineaux, in the 15th district and in the south of the 16th district of Paris. Hubs of secondary importance have been emerging in les Hauts-de-Seine and Seine-Saint-Denis "départements" (Saint-Denis, Montreuil, Pantin);
- **architectural consultancy firms** are concentrated on the right bank of the river Seine in Paris and the inner western suburbs: Issy-les-Moulineaux and Boulogne-Billancourt, Neuilly-sur-Seine, Levallois-Perret and the municipalities in the district of la Défense;
- **heritage activities** and libraries are grouped around iconic institutions of national and international repute along the river Seine in Paris, which is also home to historic and more recent monuments (French National Library) and in Versailles;
- finally, **arts education** for art lovers is mostly located in Paris and a little in bordering municipalities to the north (Saint-Denis) and to the West (Suresnes, Boulogne-Billancourt). ■

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DEFINITIONS

- The **economic scope of culture** has been defined by the Statistics Department of the Ministry of Culture based on a European definition with a dual approach: first, by classification of economic activities (NAF Rév 2); and second, by classification of social and vocational categories (PCS 2003).
- **Cultural activities** are grouped under eight areas: heritage-libraries (museums, historic monuments, libraries), print media, visual arts, performing arts (notably theatres), audiovisual-cinema-multimedia, cultural education, architecture and advertising.
- **Cultural professions** are also grouped under eight categories: visual arts and craft professions, technical and artistic show-business professionals, journalist and executives in publishing, show-business artists, architects, art teachers, literary authors and translators, archiving-conservation and documentation professions.
- **Temporary workers are employees under "standard" fixed-term contracts.** Show-business

artists, workers and technicians are employees who alternate periods of employment and unemployment by signing fixed-term contracts linked with jobs that are temporary by nature. We refer to "temporary" workers as opposed to permanent workers in the audiovisual and performing art sectors who work under either permanent or temporary contracts.

- **Specificity index:** measures the relationship between the share of cultural jobs as a percentage of total employment in a municipality and the share of cultural employment as a percentage of total regional employment.

DATA

- 2013 population census.
- DADS 2014.
- CLAP.
- Enhanced Economic Data File (FEE) produced by the French National Statistics Office (INSEE).

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