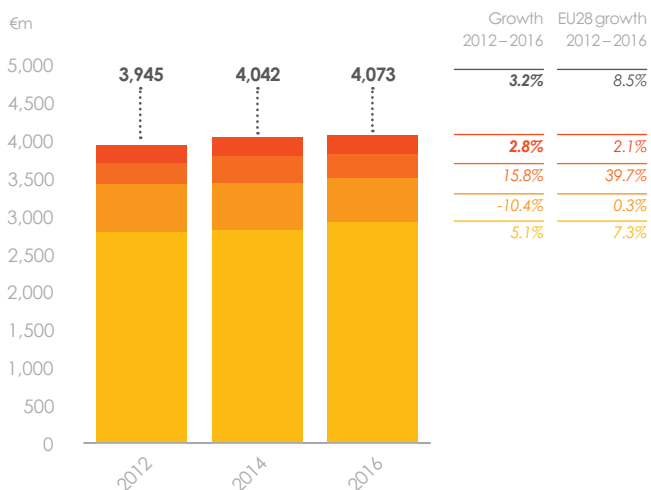


The impact of the internet and digitalization on creative industries in Poland



Increased creative industries revenues and employment

Creative industries revenues



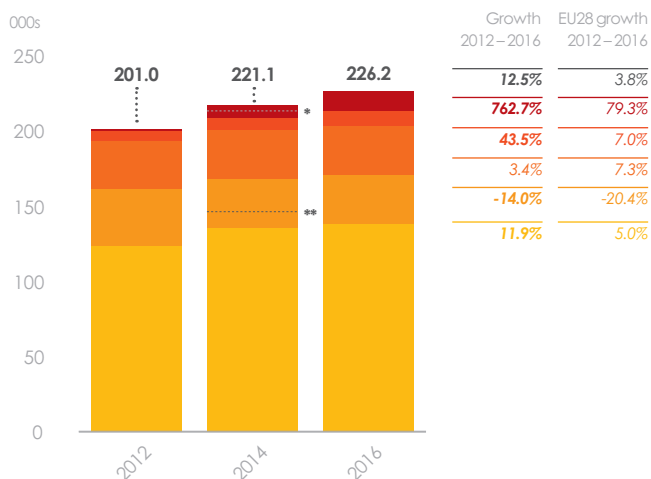
3.2%

rise in creative industries revenues overall between 2012-2016

Data combines several sources including PwC and IFPI; for full PwC figures see full report: oando.co.uk/latest-thinking

- Music
- Video games
- Book publishing
- TV, video & film

Creative industries employment



12.5%

rise in creative industries employment overall between 2012-2016

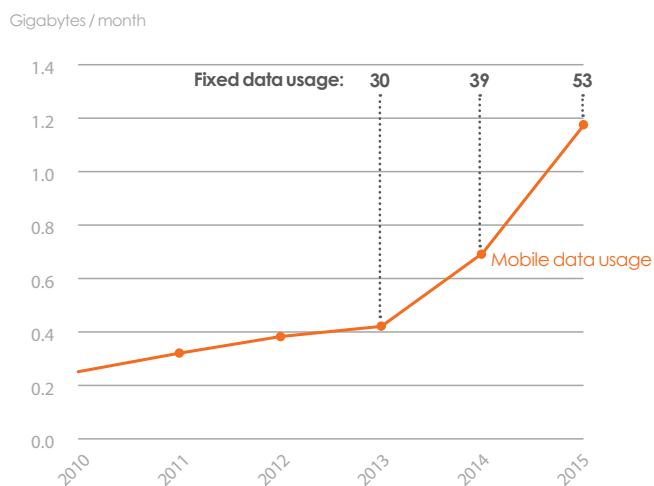
For full sources see full report

oando.co.uk/latest-thinking

- Software publishing
- Music
- TV, video & film
- Publishing
- Heritage

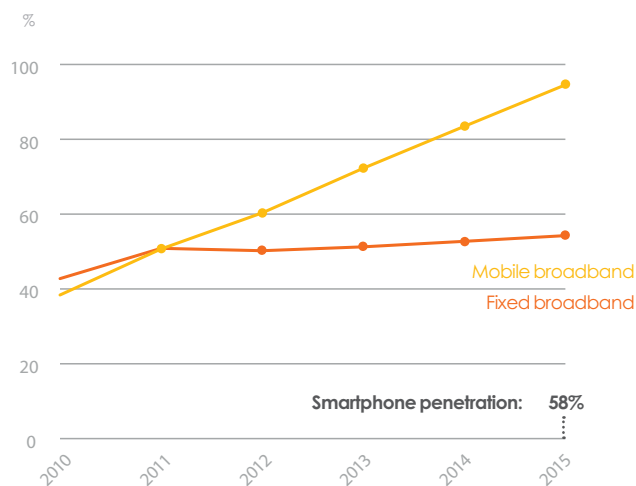
Increased access to creative content

Mobile and fixed data usage per connection



Source: Analysys Mason

Broadband penetration by technology (fixed and mobile)

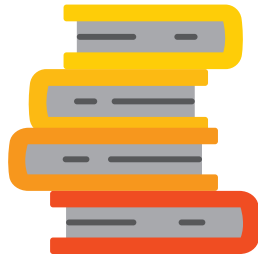


Source: Analysys Mason, ITU

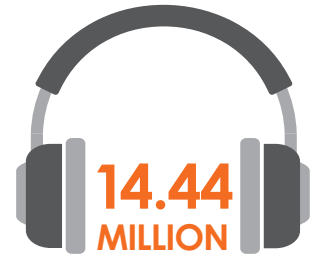
Reduced production and distribution costs

Technological efficiencies have reduced distribution costs

In 2014 the online sale of printed books had a market share of 36 percent – higher than that of bricks and mortar stores



Digital music revenues quadrupled between 2011 and 2015, from \$3.42m to \$14.44m



Benefits to consumers

More content is available and a wider variety of services provide greater choice

The number of available nationwide TV channels increased from 39 in 2003 to 118 in 2013



The audiobook market grew rapidly as online became mainstream, achieving growth of 23 percent in 2012



Benefits to producers

Creators are free from the traditional value chain and can reach consumers directly

Children's tablet games company Ola & Olo can reach consumers directly thanks to Google Play – it has created around 50 games



Demand for content has increased, supported by increased quality

Between 2009 and 2013, the top 6 Polish TV groups increased spending on original programming by 11 percent, from €287m to €319.9m

