

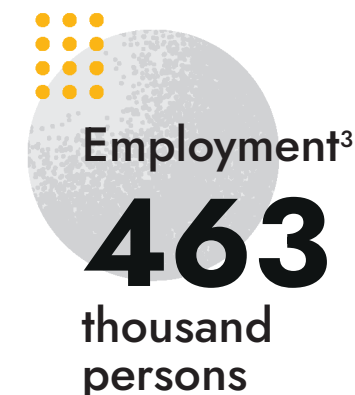
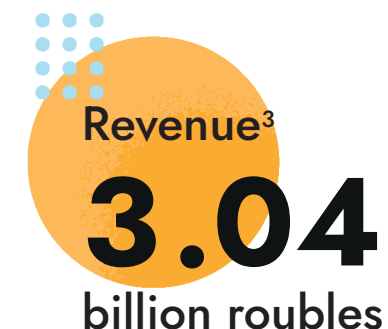
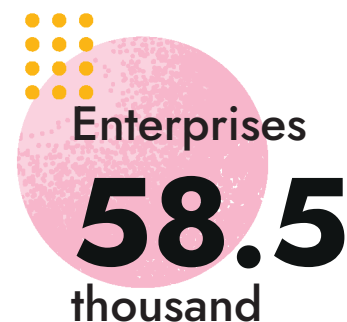
INDICATORS OF MOSCOW'S CREATIVE ECONOMY

On the basis of the Moscow's Creative Industries Classification, we have compiled a register of profile enterprises.

As key sources of information for the classification, we used SPARK-Interfax and FIRA PRO¹ databases containing qualitative and quantitative indicators of enterprises and sole proprietors (SPs). From these databases we have made lists of active Moscow enterprises and SPs which marked one of the types of economic activities included into the classification as a main activity².

Because the OKVED2 codes of officially declared activities often do not correspond to the actually performed activities, the register has been updated with open source data – results of specialised ratings, data from industry-specific contests, conferences, etc. A number of enterprises that did not perform 'creative activities' were excluded from the final register (see Technical Notes). As a result, we have obtained basic economic characteristics of the Moscow's creative sector.

There are over 58 thousand enterprises and 54 thousand SPs operating within Moscow's creative industries. In 2018, the total revenues of Moscow's creative industries enterprises exceeded 3.04 trillion roubles and the employment – 463 thousand persons (excluding enterprises that have not provided the reports). By HSE estimates, in 2019 the total revenue of enterprises in creative industries has reached 4 billion roubles.

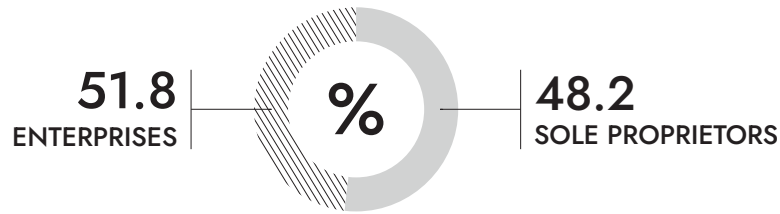


¹ SPARK and FIRA PRO products' description can be found on <https://www.spark-interfax.ru/> and <https://fira.ru>, respectively.

² As of August 2020.

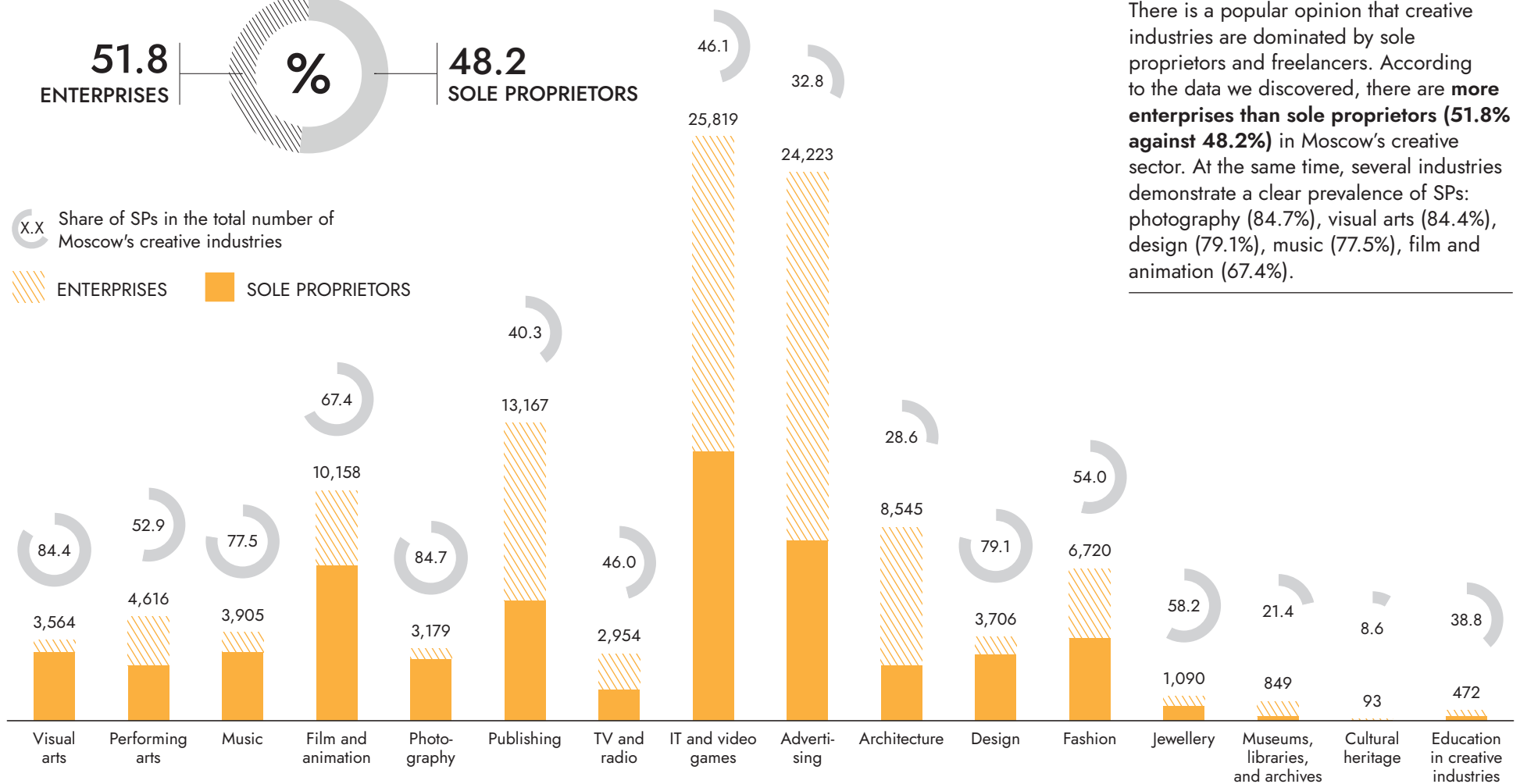
³ The data about 2018 revenues were reported by 27,901 enterprises (47.7% of their total number), about employment – 32,525 (60.7%). Employment in other enterprises and SPs has been conditionally taken at 1 person.

REGISTERED ENTERPRISES AND SOLE PROPRIETORS



x.x Share of SPs in the total number of Moscow's creative industries

ENTERPRISES SOLE PROPRIETORS



There is a popular opinion that creative industries are dominated by sole proprietors and freelancers. According to the data we discovered, there are **more enterprises than sole proprietors (51.8% against 48.2%)** in Moscow's creative sector. At the same time, several industries demonstrate a clear prevalence of SPs: photography (84.7%), visual arts (84.4%), design (79.1%), music (77.5%), film and animation (67.4%).

CREATIVE INDUSTRIES BREAKDOWN BY AGE OF ENTERPRISE

YOUNG

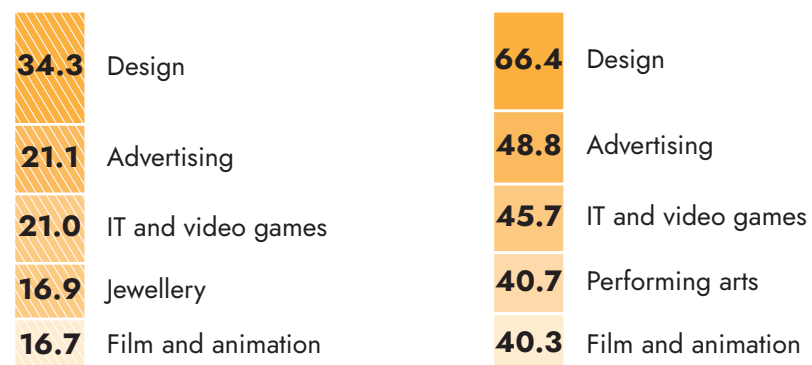
 ENTERPRISES

16.9%

 SOLE PROPRIETORS

41.0%

Top 5 creative industries by share of enterprises/SPs that have been operating on the market between 1 and 3 years



Moscow's creative economy is characterised by high business buoyancy. Around 17% of enterprises and 41% of SPs are young, active on the market less than three years. Such companies are, as a rule, concentrated in areas of design (over 50%), advertising, and IT.

MATURE

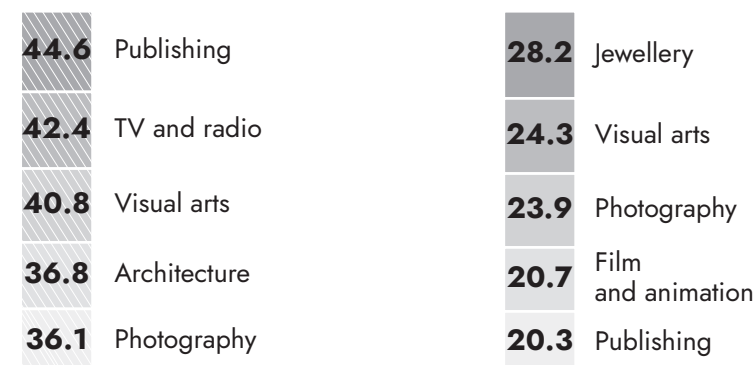
 ENTERPRISES

27.9%

 SOLE PROPRIETORS

13.8%

Top 5 creative industries by share of enterprises/SPs that have been operating on the market over 10 years



Over half of enterprises in publishing, visual arts, and TV and radio have been operating on the market over ten years. In jewellery and publishing, visual arts, photography, and film industry there is also a significant number of mature SPs. Their share varies from 20% to 30%.

REVENUE AND EMPLOYMENT



**BILLION
ROUBLES**

3,044.5

3.0
27.7
20.9
186.9
3.4
273.5
285.2
833.6
796.7
364.8
9.7
203.9
26.5
5.6
0.04
3.2

- Visual arts
- Performing arts
- Music
- Film and animation
- Photography
- Publishing
- TV and radio
- IT and video games
- Advertising
- Architecture
- Design
- Fashion
- Jewellery
- Museums, libraries, and archives
- Cultural heritage
- Education in creative industries

4.4
16.0
6.0
22.0
4.1
60.0
19.5
152.3
73.9
53.9
5.1
36.1
6.3
2.6
0.1
1.2



**THOUSAND
PERSONS**

463.3

The largest of Moscow's creative industries by revenue and employment are advertising and IT. Their cumulative percentage equals half of the Moscow's creative sector.

A big share is also occupied by publishing and architecture. Contribution of other creative industries to the economy of the city is less notable.