

# Development of Creative Industries in Russia: Key Indicators

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Human in the Era of Technological  
Transformations

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# Introduction

Creative industries are sectors of the economy where a significant part of added value is generated by creative activity and management of intellectual property rights. They include architecture, design, fashion, fine and performing arts, music, film and animation, video games, broadcasting, advertising etc.

In recent years, the creative industries as a promising segment of the economy have attracted the attention of politicians, experts, and scientists. This sector demonstrates higher growth than other industries: it generates about 3% of global GDP and employs 1% of the economically active population of the planet. The development of creative industries has multiple positive effects for the economy and society, including the growth of small and medium-sized enterprises, job creation, diversification and increase in the volume of non-commodity exports, improving the quality of human capital by attracting talent and building in-demand competencies. Creative industries also serve as a source of sustainable inclusive growth, as they provide opportunities for self-development and foster comfortable living environments.

The methodological basis for quantifying creative industries and creative economy in the world is still incomplete. One of the first attempts to classify creative industries was made by the UK Department of Culture, Media and Sport in 1998. Later, UNESCO and UNCTAD proposed alternative typologies. In Europe and Asia, creative industries are grouped differently.

The following approaches to measuring and analyzing the creative economy are the most widespread in the world:



Assessment of the scale and contribution of creative industries to the economy based on their sectoral classifications



analysis of foreign trade in creative goods and services



analysis of employment in creative professions and industries



analysis of the geographical location of creative industry organizations

# Methodology

To quantify creative industries, the team of the Institute of Statistical Studies and Economics of Knowledge of the National Research University Higher School of Economics (ISSEK NRU HSE) compiled a theoretical and methodological framework, which can be presented as a matrix (Table 1).

**Table 1**  
**A theoretical and methodological framework for quantifying the creative economy and creative industries**

Analysis area	Sectoral analysis (creative industries)	Employment (creative professions)	Foreign trade (creative goods and services)	Spatial analysis (creative clusters)
Key indicators	Added value Sales volume (revenue) Number of employed Investment Remuneration	Number of employed in creative professions (in creative and traditional industries) Informal employment Socio-demographic indicators	Export/Import Trade balance Foreign trade volume	Geographic concentration Vicinity to regional and urban infrastructure Regional distribution
Methodological basis for measurements re. Russia	Classification of creative industries (based on OKVED 2*)	Classification of creative professions (based on OKZ 2014**)	Classification of creative goods (based on TN VED***, UNSD EBOPS****)	Classification of creative industries (based on OKVED 2)
Data sources for Russia	Rosstat, microdata of organizations (SPARL-Interfax, FIRA PRO)	Rosstat (labor force survey, national census)	Federal Customs Service, Bank of Russia	Microdata of organizations (SPARL-Interfax, FIRA PRO)
Theoretical and methodological grounds	Some types of economic activity are characterized by a greater creative component [DCMS, 1998; Garnham, 2005; Pratt, 2005; O'Connor, 2007]	Creative activity happens in various industries and can be measured by the number of employed in creative professions [Freeman, 2004, 2008; Higgs et al., 2008]	Some goods and services have a greater creative component [UNCTAD, 2008, 2010; UNESCO, 2013; Pratt, 2008]	Location of creative industries impacts economic activity of cities and regions [Florida, 2002; Boschma, 2005; Lorenzen, Frederiksen, 2008; Chapain, Comunian, 2010]

\* OKVED, Russian National Classifier of Types of Economic Activity OK 029-2014 (NACE ed. 2) (approved by Rosstandard ordinance #14-ct of January 31, 2014).

\*\* OKZ, All-Russia Classifier of Occupations OK 010-2014 (ISCO-08) (approved and enacted by Rosstandard ordinance #2020-ct of December 12, 2014).

\*\*\* TN VED, Commodity Nomenclature of Foreign Economic Activity (approved by decision of the Council of the Eurasian Economic Commission #45 of July 16, 2012 (as amended on April 23, 2021) "On approving the Common Commodity Nomenclature of Foreign Economic Activity of the Eurasian Economic Union and Common Customs Tariff of the Eurasian Economic Union").

\*\*\*\* Extended Balance of Payments Services (developed by UNSD).

Source: ISSEK NRU HSE.

A review of the best foreign practices helped to develop a classification of creative industries, professions, goods and services and to assess the key economic indicators of the sector's development (see Annex).

Employment in the creative economy was assessed on the basis of the “creative trident” concept used in international practice, which takes into account two attributes: employment in creative professions and creative industries (Table 2). Those employed in the creative economy include three of the four groups formed on the basis of these attributes: those employed in creative professions in creative industries – “professionals” (e.g., copywriters in advertising agencies); those employed in creative professions in other industries – “integrated” (e.g., designers in car companies); those employed in other professions in creative industries – support staff (e.g., secretaries in film companies).

**Table 2**  
**Groups of those employed in the creative economy (“creative trident”)**

		Industries	
		Creative	Other
Professions	Creative	“Professionals” (creative professions in creative industries)	“Integrated” (creative professions in other industries)
	Other	Support staff (other professions in creative industries)	

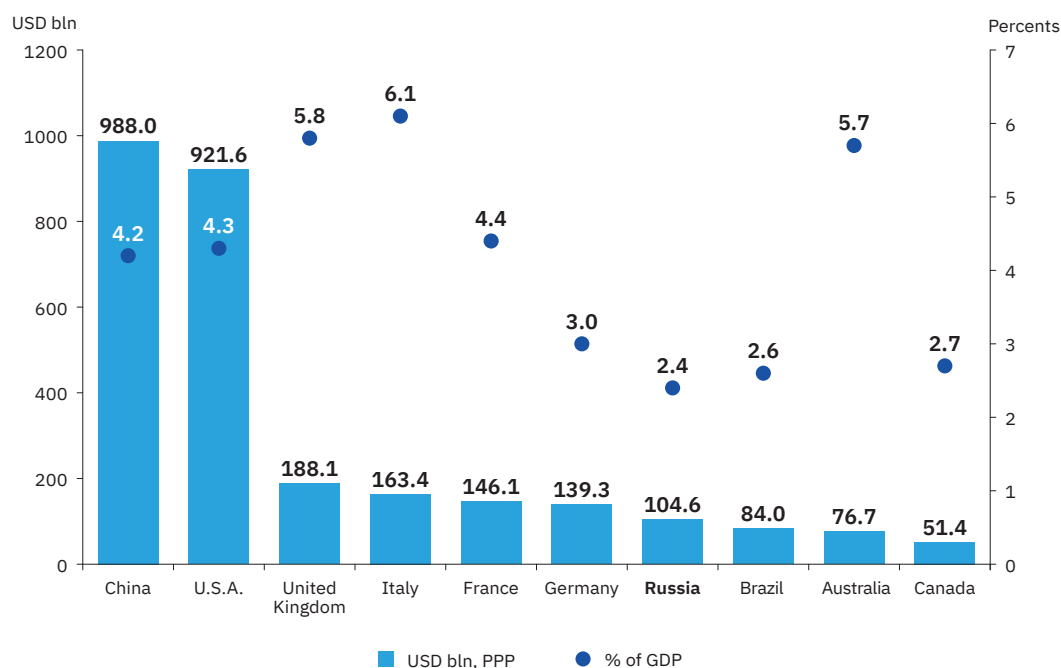
Source: ISSEK NRU HSE.

# Findings

## Sectoral Analysis

The gross value added of creative industries in Russia amounts to 2,390 bln rubles (\$104.6 bln at purchasing power parity), or 2.4% of GDP (Fig. 1). Russia is close to the global average (3%), but trails the leading countries.

Figure 1  
Gross value added of creative industries, by country: 2019\*

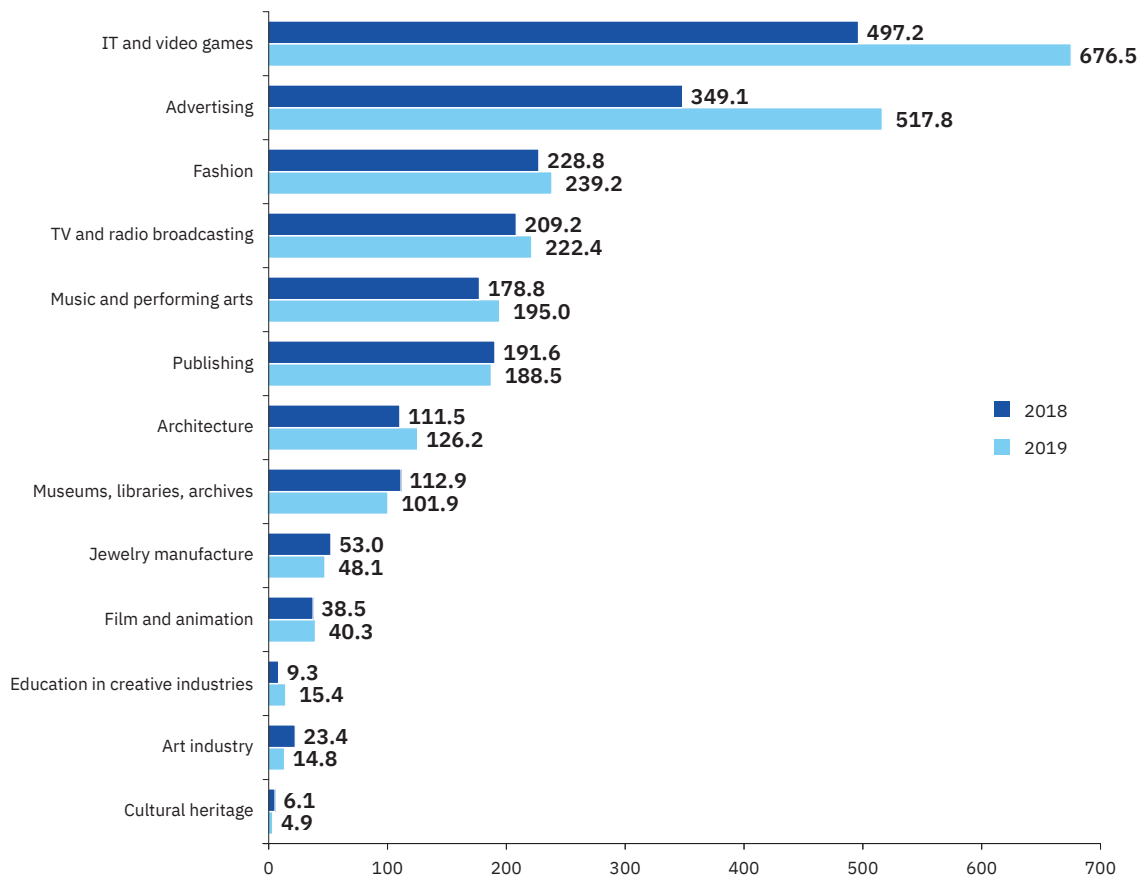


\* Data for GDP share for 2019 or closest available years.

Sources for Russia – ISSEK NRU HSE estimates based on the classifier of creative industries and Rosstat data on institutions' trade volume (form № П-1 "Information on the Manufacture and Shipment of Goods and Services"), and volume of GDP produced in detail for 2019.; for foreign countries – [1–9].

In 2019, despite the slowdown in economic growth from 2.8% to 2%, the creative industries continued to develop at a faster pace, with almost all of their growth (RUB 348 billion out of RUB 399 billion) concentrated in the two largest industries – advertising (+48%) and the IT sector (+36%) (Fig. 2). It should be noted that such high values may be due not only to real changes, but also to the ongoing reassessment of the industries' scale by Rosstat. The rest of the creative industries demonstrated weak mixed performance. There was a slight increase in value added in performing arts, cinema, TV and radio broadcasting, fashion, and architecture, and an equally slight decline in publishing, art industry, jewelry, and cultural facilities. Educational organizations also demonstrated positive performance.

**Figure 2**  
**Gross value added of creative industries in Russia, bln rubles\***

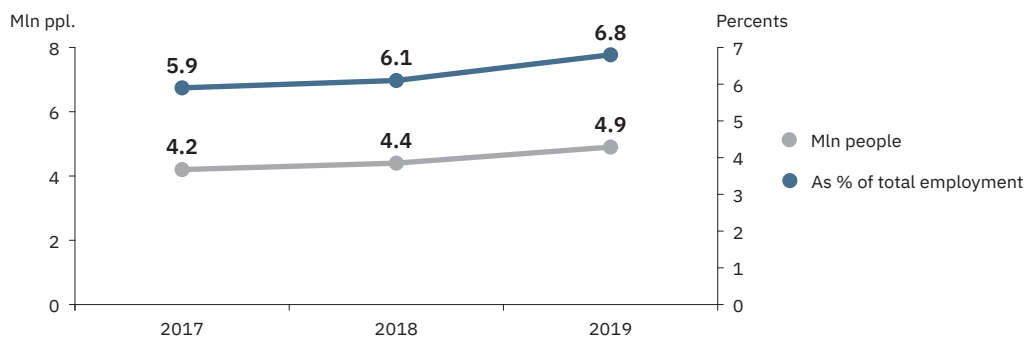


\* Available data insufficient to estimate added value in design, photography, crafts.  
 Source: ISSEK NRU HSE.

## Employment

In 2019, there were 4.9 million people working in Russia’s creative economy, which is 6.8% of the total employment in the country (Fig. 3).

**Figure 3**  
**Employment in Russia’s creative economy**



Source: ISSEK NRU HSE based on Rosstat data.

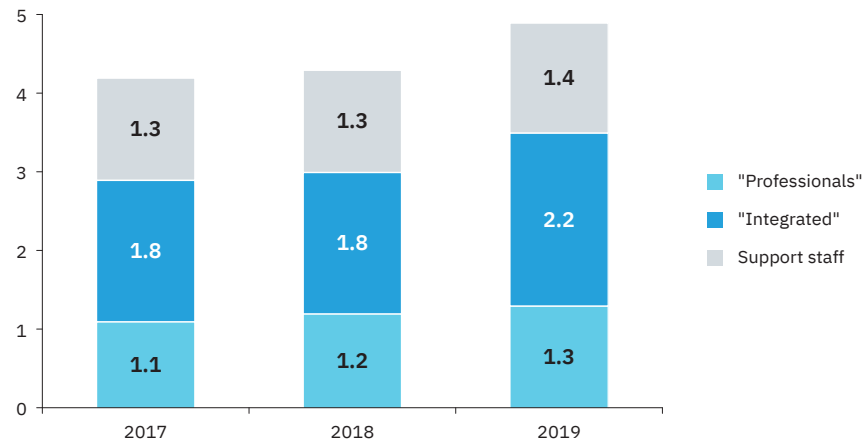


Following the concept of “creative trident”, the structure of employment in the creative economy can be analyzed in different sections. In 2019, there were 2.7 million employees in creative industries and 3.5 million in creative professions. The largest group of employees in Russia’s creative economy are “integrated”, i.e. representatives of creative professions employed in traditional industries.

Between 2017 and 2019, the number of people employed in Russia’s creative economy grew by 14.6%, with positive dynamics observed in all categories of the “trident”. The most significant changes occurred in the group of “integrated” workers (Fig. 4).

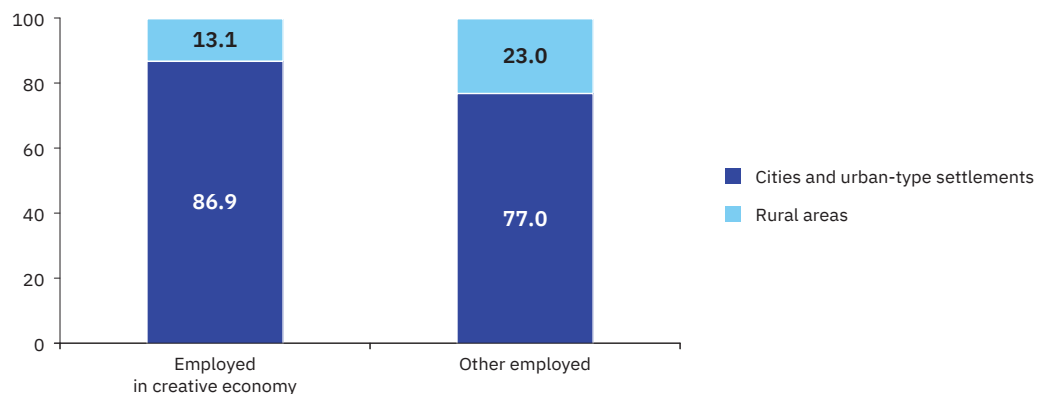
In Russia, just as in other countries, those employed in the creative economy are more likely than workers in other professions to live in cities and urban-type settlements, where the market is more competitive and effective demand is higher (Fig. 5)

**Figure 4**  
**Employment structure of Russia’s creative economy, mln people**



Source: ISSEK NRU HSE based on Rosstat data.

**Figure 5**  
**Employment in Russia’s creative economy, by settlement type: 2019, %**

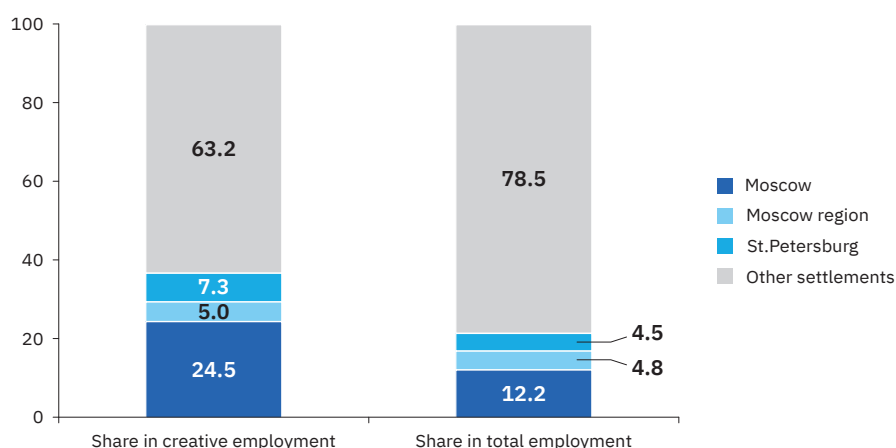


Source: ISSEK NRU HSE based on Rosstat data.

Creative employment is concentrated in the largest cities – Moscow and St. Petersburg, as well as in the Moscow Region (Fig. 6). The share of creative workers in the total number of employed in these regions is much higher: the figure for Moscow (13.6%) is almost twice as high as Russia’s average.

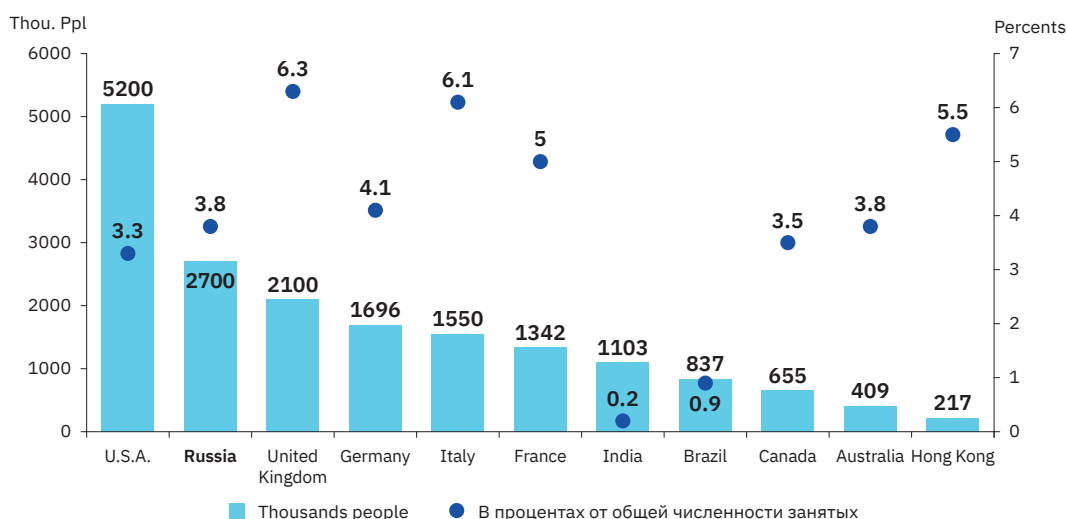
In 2019, 2.7 million people, or 3.8% of the country’s workforce, were employed directly in the creative industries. In terms of this indicator, Russia is close to such countries as Canada and Australia (Fig. 7).

**Figure 6**  
**The share of metropolitan regions in Russia’s creative employment: 2019, %**



Source: ISSEK NRU HSE based on Rosstat data.

**Figure 7**  
**Employment in creative industries, by country: 2019\***



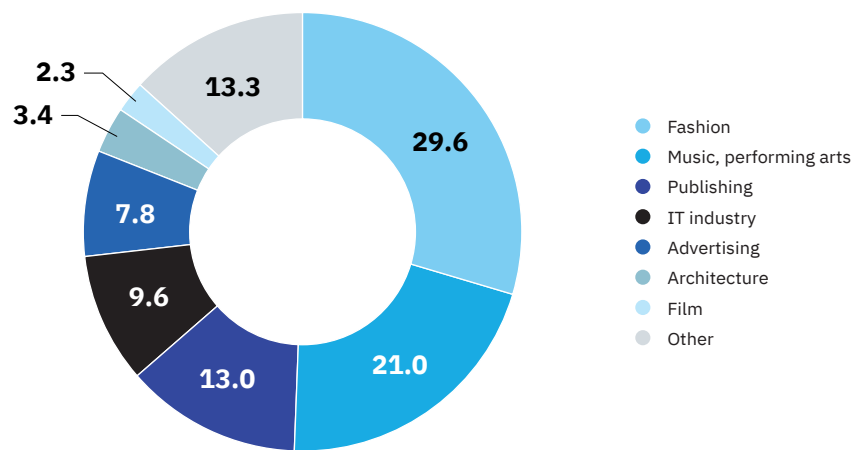
\* Or closest available years. Country data with following available breakdowns: UK (2019), Canada (2018), Australia (2016), Hong Kong (2018) – creative industries; Germany (2018), Italy (2019), France (2018), South Africa (2017) – cultural creative industries; India (2016) – industries related to copyright; Brazil (2019) – creative economy; U.S.A. (2019) – culture and arts.

Source for Russia – ISSEK NRU HSE estimates based on classification of creative professions and data of the Rosstat Labor Force Survey for 2019; for foreign countries – [2–4, 6–7, 10–21].

The three creative industries with the highest number of creative workers employed more than two-thirds of all those employed in the creative sector: the fashion industry – 30%1, music, performing arts, culture and recreation – 28%, publishing – 15% (Fig. 8).

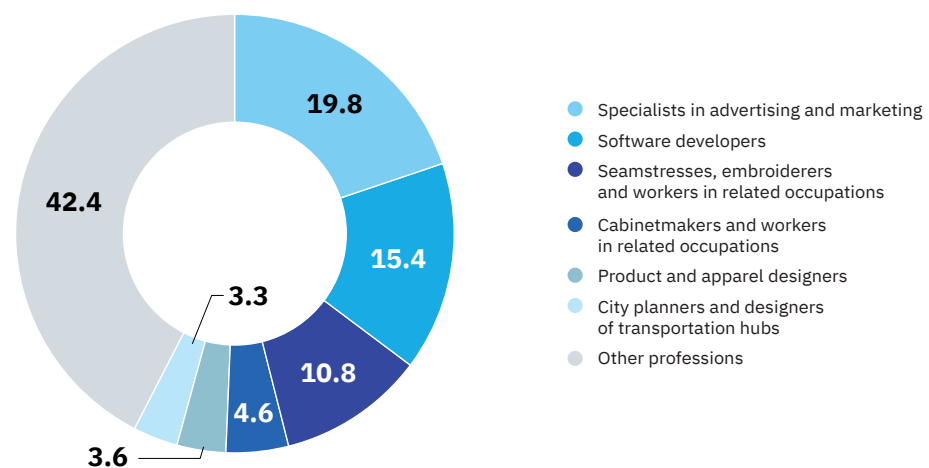
About 70% of all those employed in creative professions fall within the top-ten most common (Fig. 9). These include advertising and marketing specialists (20%), software developers (15%), seamstresses, embroiderers and workers in related occupations (11%), cabinetmakers and workers in related occupations (10%), product and apparel designers (4.6%), city planners and designers of transportation hubs (3.6%), and other professions (3.3%).

**Figure 8**  
**Structure of employment in creative industries: 2019, %**



Source: ISSEK NRU HSE based on Rosstat data.

**Figure 9**  
**Structure of employment in creative professions: 2019, %**

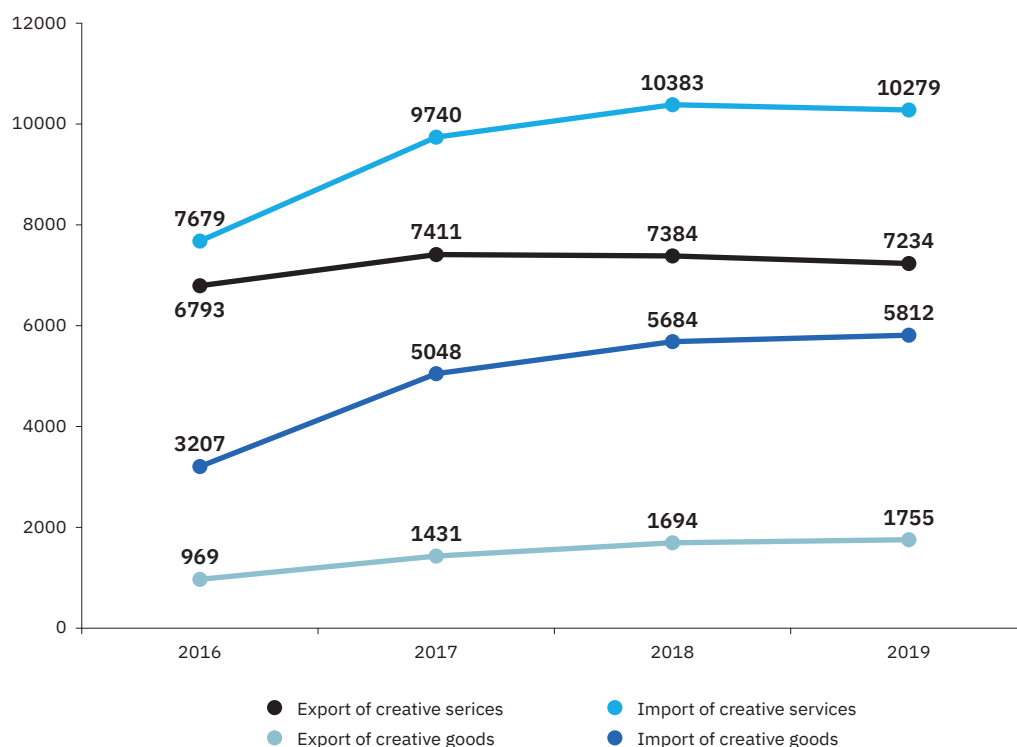


Source: ISSEK NRU HSE based on Rosstat data.

## Foreign Trade

Russia's foreign trade in creative goods and services is characterized by a negative trade balance (Fig. 10). In 2016-2019, against the background of insignificant (within 10%) fluctuations in export volumes, there was a tangible (by about one third) increase in imports of creative services – mainly due to the consumption of advertising and engineering services from non-CIS countries. In trade in creative services, our country's position is somewhat more favorable than in trade in creative goods: the trade deficit amounted to USD 3 bln (for goods – USD 4 bln), while the sales volume of services is approximately twice as large.

Figure 10  
Foreign trade in Russia's creative goods and services, USD mln

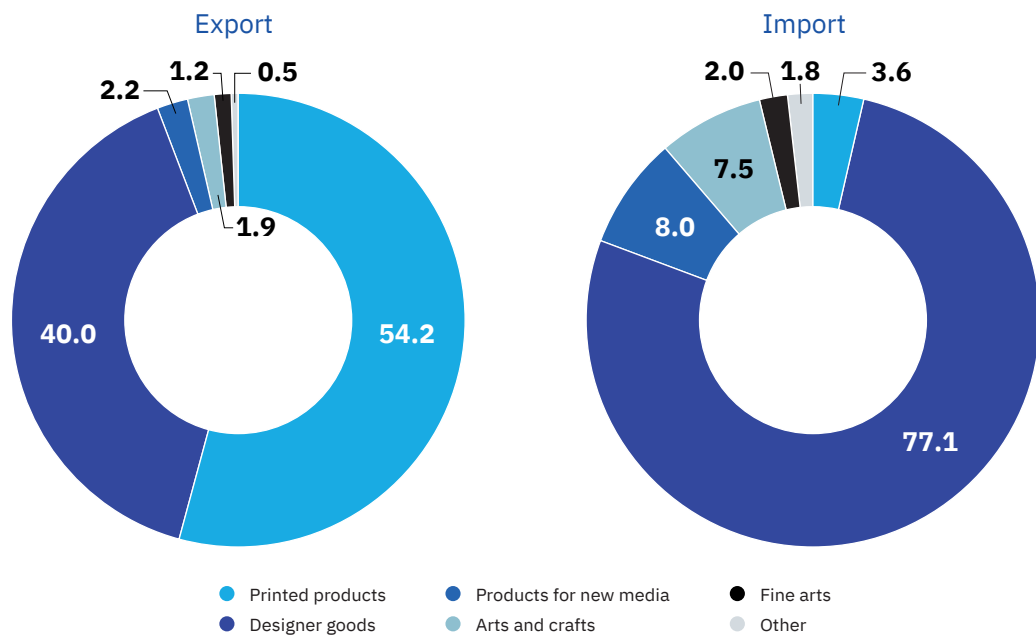


Source: ISEK NRU HSE based on Bank of Russia and Federal Customs Service of Russia data.

While Russia remains a net exporter of marketing and advertising services, as well as research and development, it is largely dependent on imports of architectural, engineering and technical services, which leaves innovation processes in the country vulnerable to external shocks.

The recovery of the foreign trade volume of creative goods after the crisis of 2014-2016 was not accompanied by any noticeable changes in import substitution. Russia exports mainly low-end products, such as books and newsprint, as well as interior items (furniture, wallpaper, etc.) (Fig. 11). Imports of creative goods are dominated by furniture and toys, with imports of the latter accounting for almost a third of the total negative balance of trade in creative goods (USD 1.2 bln).

Figure 11  
**Structure of Russia's foreign trade in creative goods: 2019, %**



Source: ISEK NRU HSE based on the Federal Customs Service of Russia data.

# Conclusion

The study provides a theoretical and methodological framework and a system of statistical classifications to quantify the creative economy and creative industries in Russia based on sectoral analysis, analysis of occupations and trade in creative goods and services. Empirical estimates of the scale, structure and dynamics of the creative economy development are provided. The findings can serve as a basis for statistical observation and the development of scientifically sound creative economic assessment of creative economy parameters in Russia and other countries. Further research in this area may entail improving creative industries classification, as well as developing alternative methods to quantify their parameters, including through the analysis of big data.

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# Annex

## Creative industries classification in Russia

OKVED 2 code	Name of the type of economic activity
<b>Art industry</b>	
90.03*	Artistic creation activities
47.78.5	Activities of commercial art galleries, retail sale of works of art in commercial art galleries
47.79.1	Retail trade in antiques
<b>Crafts</b>	
32.99.8	Production of folk arts and crafts
<b>Music, performing arts, culture and recreational institutions</b>	
32.2	Making of musical instruments
59.20	Activities in the field of sound recording and publishing of musical works
90.01	Performing arts activities
90.02	Support activities related to the performing arts
90.04	Activities of cultural and art institutions
47.59.5	Retail trade in musical instruments and sheet music in specialized stores
47.63*	Retail trade in music and video recordings in specialized stores
<b>Film and animation</b>	
59.11	Production of motion pictures, video films and television programs
59.12	Editing and assembly activities in the field of production of motion pictures, video films and television programs
59.13	Activities related to the distribution of films, videos and television programs
59.14	Activities in the field of film exhibition
77.22	Rental of videocassettes and audio cassettes, gramophone records, compact disks (CDs), digital video disks (DVDs)
<b>Photography</b>	
74.20	Photography activities
<b>Publishing</b>	
18.1	Printing activities and provision of services in this field
58.11	Book publishing
58.13	Newspaper publishing

(continuation)

OKVED 2 code	Name of the type of economic activity
<b>Publishing</b>	
58.14	Publishing magazines and periodicals
58.19	Other types of publishing activities (publication of catalogs, photographs, prints and postcards, etc.)
74.30	Translation and interpretation
47.61	Retail trade in books in specialized stores
47.62	Retail trade in newspapers and stationery in specialized stores
47.79.2	Retail trade in second-hand books
<b>TV and radio broadcasting</b>	
60.10	Radio broadcasting activities
60.20	TV broadcasting activities
63.91	Activities of news agencies
<b>IT and video games</b>	
58.21	Computer game publishing
58.29	Publishing other software products
62.01	Computer software development
62.02	Consulting activities and works in the field of computer technology
63.12	Web portal activities
<b>Advertising</b>	
70.21	Public relations activities
73.11	Advertising agencies activities
<b>Architecture</b>	
71.11	Activities in the field of architecture
<b>Design</b>	
74.10*	Activities specialized in design
<b>Fashion</b>	
13	Manufacture of textile products
14	Apparel manufacturing
15	Manufacture of leather and leather goods
<b>Jewelry manufacture</b>	
32.12	Manufacture of jewelry and similar products
32.13	Manufacture of costume jewelry and similar goods

(ending)

OKVED 2 code	Name of the type of economic activity
<b>Libraries, archives, museums</b>	
91.01	Libraries and archives activities
91.02	Museum activities
<b>Cultural heritage</b>	
91.03	Activities for the protection of historical sites and buildings, cultural monuments
<b>Education in creative industries</b>	
85.41.2	Cultural education

\* Activity under codes 47.63, 74.10, 90.03 may be referred to several creative industries depending on its specialization. Thus, the mentioned codes were included in a specific sector based on expert opinion and considering current international practices.

Source: ISSEK NRU HSE based on other countries' classifications.

## Classification of creative professions

OKZ-2014 code	Creative professions group under OKZ
1221	Heads of sales and marketing services
1222	Heads of advertising and PR services
1330	Heads of information and communications technology services and units
2511	System analysts
2512	Software developers
2513	Web and multimedia application developers
2514	Application programmers
2161	Architects of building and installations
2162	Landscape architects
2164	City planners and designers of transportation hubs
2161	Architects of building and installations
2622	Library specialists
2621	Archive and museum specialists
2642	Journalists
2432	PR specialists
2431	Advertising and marketing specialists
3112	Civil engineering technicians
2164	City planners and designers of transportation hubs
2651	Artists
3432	Set designers and decorators
7316	Painters, printmakers, engravers and etchers

(ending)

OKZ 2014 code	Creative professions group under OKZ
2641	Writers, poets and other literati
2643	Translators/interpreters and other linguists
2655	Actors
2653	Dancers and choreographers
2652	Musicians, singers and composers
2654	Film, theater and related art directors and producers
3431	Photographers (art)
3521	Specialist technicians in radio and television broadcasting
2166	Graphic and multimedia designers
2163	Product and apparel designers
2431	Advertising and marketing specialists
7221	Blacksmiths
7533	Seamstresses, embroiderers and workers in related occupations
7315	Glass molders, stone carvers, grinders and polishers
7314	Potters and workers in related occupations
7522	Cabinetmakers and workers in related occupations
7317	Workers in arts and crafts making wicker, woodwork and making products from similar materials
7312	Makers, tuners and restorers of musical instruments
7313	Masters of jewelry and products made of precious metals and stones, crafts (lacquer miniature, art painting on metal and ceramics)
7316	Painters, printmakers, engravers and etchers
7319	Skilled manual laborers not included in other groups
7317	Workers in arts and crafts making wicker, woodwork and making products from similar materials
7318	Workers in arts and crafts who make products from textiles, leather, fur and similar materials

Source: ISSEK NRU HSE based on classification of the UK Department of Culture, Media and Sports (DCMS). [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/523024/Creative\\_Industries\\_Economic\\_Estimates\\_January\\_2016\\_Updated\\_201605.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/523024/Creative_Industries_Economic_Estimates_January_2016_Updated_201605.pdf) (access date June 2, 2021).

## Classification of creative goods

TN VED codes	Name of commodity group (according to UNCTAD classification)
<b>Художественные промыслы</b>	
570110, 570190, 570210, 570220, 570231, 570232, 570239, 570241, 570242, 570249, 570250, 570291, 570292, 570299, 570330	Woven goods
950510, 950590, 950810	Holiday products
442090, 670290, 701890, 960110, 960190, 960200	Other artistic crafts
480210	Hand-formed paper and cardboard
460121, 460122, 460129, 460192, 460193, 460194, 460199, 460211, 460212, 460219	Wicker products

(ending)

TN VED codes	Name of commodity group (according to UNCTAD classification)
<b>Arts and crafts</b>	
580430, 580500, 580610, 580620, 580631, 580632, 580639, 580640, 580810, 580890, 580900, 581010, 581091, 581092, 581099, 581100, 600240, 600290, 600310, 600320, 600330, 600340, 600390, 600410, 600490, 630232, 630240, 630411, 630491, 630800	Yarn
<b>Goods – media of audiovisual content</b>	
370610, 370690	Film
852329, 852340, 852380	Magnetic media
<b>Designer goods</b>	
490600	Architectural and design projects
420211, 420212, 420221, 420222, 420231, 420232, 420292, 420310, 420329, 420330, 420340, 430310, 611710, 611780, 611790, 621410, 621420, 621430, 621440, 621490, 621510, 621520, 621590, 621710, 621790, 650400, 650590, 650699, 900410	Fashion accessories
701310, 701322, 701333, 701341, 701342, 701391	Glassware
441900, 481420, 481490, 570310, 570390, 570410, 570500, 580410, 580421, 580429, 590500, 691110, 691200, 691410, 821510, 821520, 821591, 940320, 940340, 940350, 940360, 940381, 940389, 940510, 940530	Interior items
711311, 711319, 711320, 711411, 711419, 711420, 711610, 711620, 711711, 711719	Jewelry
950300, 950420, 950440, 950490	Games and toys
<b>Products for new media</b>	
852321, 852351, 852352, 852359	Recorded media
950410, 950430	Video game products
<b>Goods for performing arts</b>	
830610, 920110, 920120, 920190, 920210, 920290, 920510, 920590, 920600, 920710, 920790, 920810, 920890	Musical instruments
490400	Sheet music
<b>Printed goods</b>	
490110, 490191, 490199, 490300	Books
480100, 490210, 490290	Newspapers
490510, 490591, 490599, 490810, 490890, 490900, 491000, 491110	Other printed goods
<b>Graphic arts</b>	
970400, 970500, 970600	Collectibles and antiques
970110, 970190, 970200	Painting
370510, 370590, 491191	Photography
392640, 442010, 691310, 691390, 830621, 830629, 970300	Sculpture

Source: ISSEK NRU HSE based on UNCTAD classification. [https://unctadstat.unctad.org/EN/Classifications/DimHS2007Products\\_Creatives\\_Hierarchy.pdf](https://unctadstat.unctad.org/EN/Classifications/DimHS2007Products_Creatives_Hierarchy.pdf) (access date June 2, 2021).

## Classification of creative services

EBOPS code	Name of services group*
278	Advertising, market research and public opinion services
279	R&D
280	Architectural, engineering and other technical services
287	Services to individuals and cultural and recreational services
288	Audiovisual and related services
897	Other services to individuals and cultural and recreational services (other)

\* Due to the lack of statistical detail, rather broad categories of services are considered to estimate the extent of international trade. Source: ISSEK NRU HSE based on UNCTAD classification. [https://unctad.org/system/files/official-document/ditcted2018d3\\_en.pdf](https://unctad.org/system/files/official-document/ditcted2018d3_en.pdf) (access date June 2, 2021).