

2020 ECONOMIC REPORT

CULTURAL AND CREATIVE INDUSTRIES SECTOR

1990

Creative industries

UNESCO defines Creative Industries as “those industries which have their origin in individual creativity, skill, and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.”

2009

Cultural and Creative Industries (CCIs)

UNESCO defines cultural and creative industries as “activities whose principal purpose is production or reproduction, promotion, distribution, or commercialization of goods, services, and activities of a cultural, artistic, or heritage-related nature.”

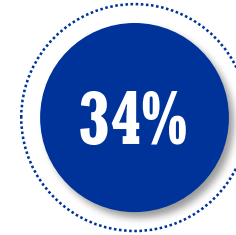
2020

Economic observatory of CCIs in the MMM territory.

Analysis of the CCI sectors **with the greatest economic development potential**: their business model must not be primarily based on subsidies, and the potential for **job creation**, as well as the capacity to generate **annual revenue** in the metropolitan area **must be significant**.



Implementation of an online survey addressed to CCI players in the territory



Response rate obtained

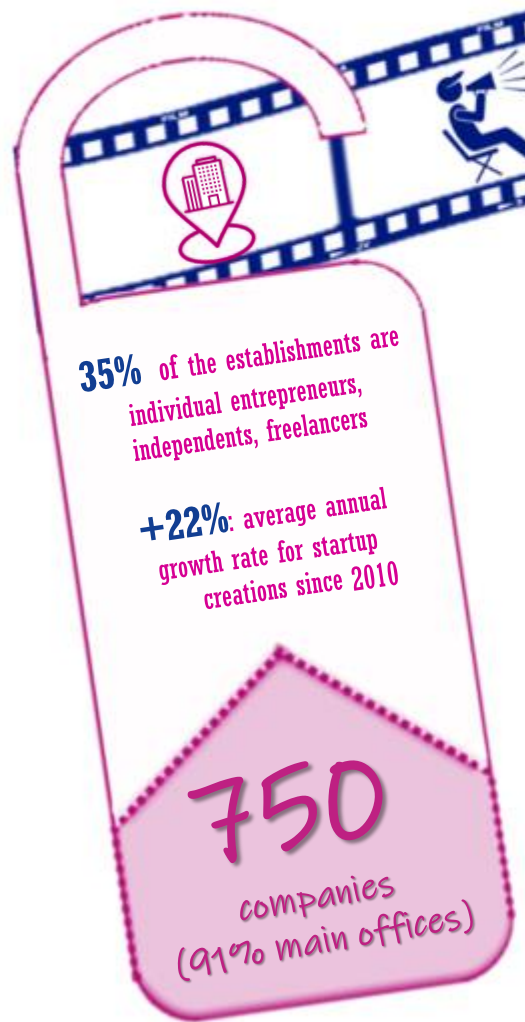


Analysis of business and financial data for companies within the territory to complete survey findings (2020 tax year)



NAF company classification codes chosen for this report

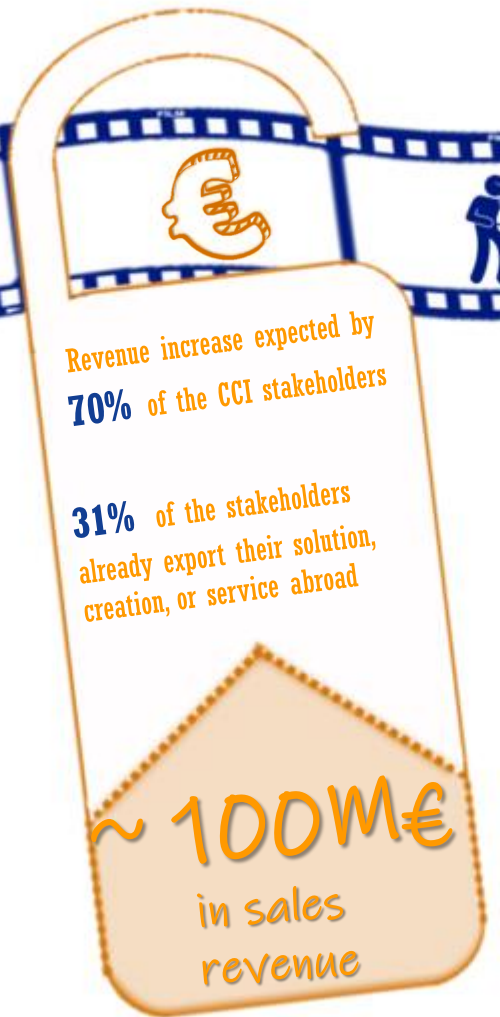
A FEW FIGURES TO SUMMARIZE



35% of the establishments are individual entrepreneurs, independents, freelancers

+22%: average annual growth rate for startup creations since 2010

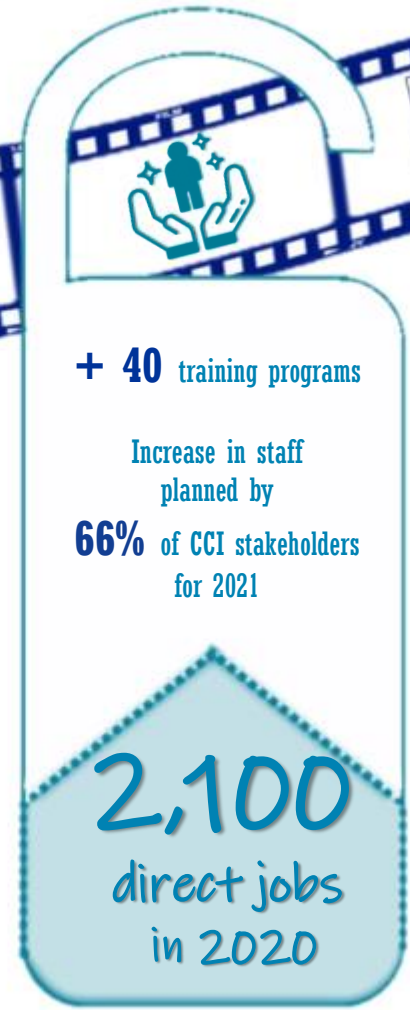
750 companies (91% main offices)



Revenue increase expected by **70%** of the CCI stakeholders

31% of the stakeholders already export their solution, creation, or service abroad

~100M€ in sales revenue



+ 40 training programs

Increase in staff planned by **66%** of CCI stakeholders for 2021

2,100 direct jobs in 2020



Animation, audiovisual, sound, cinema, video games

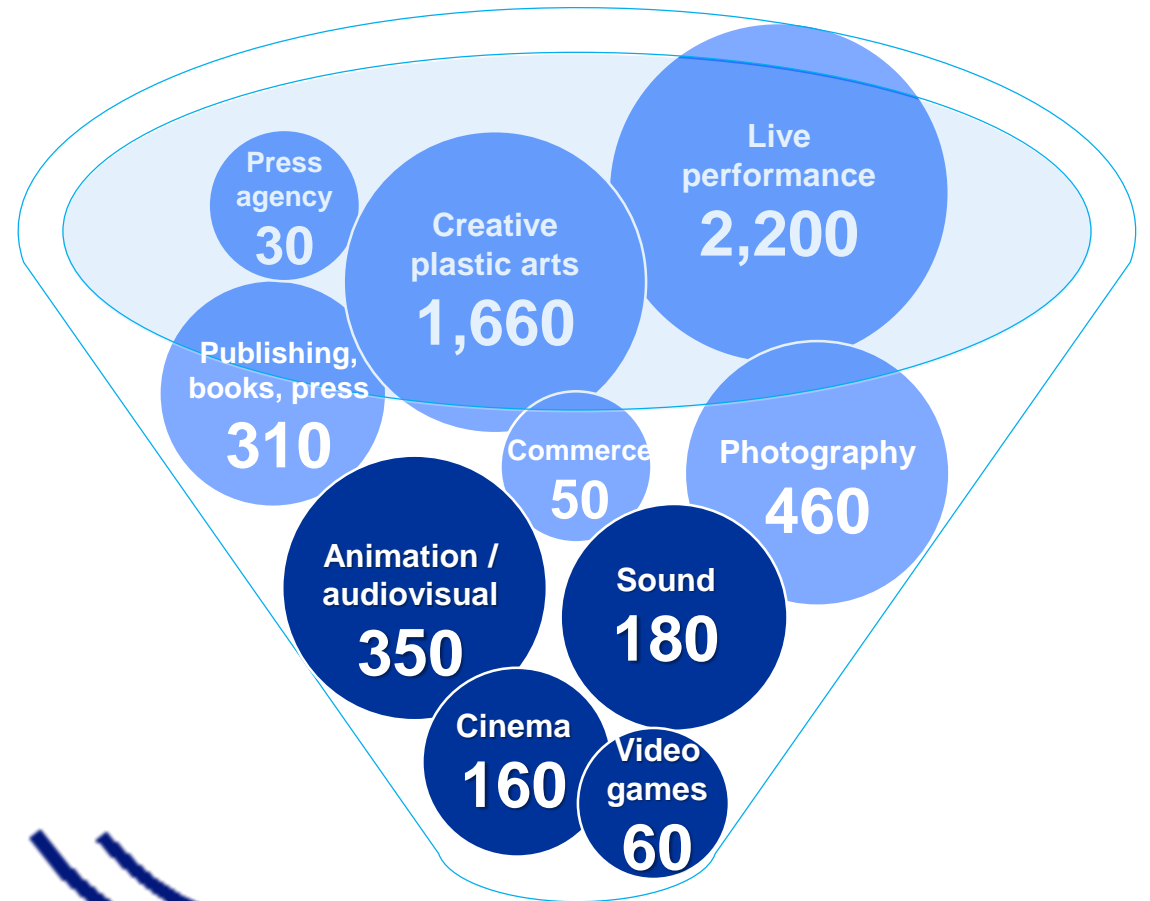
3 regional organizations uniting and driving the ecosystem

4 sectors growing fast

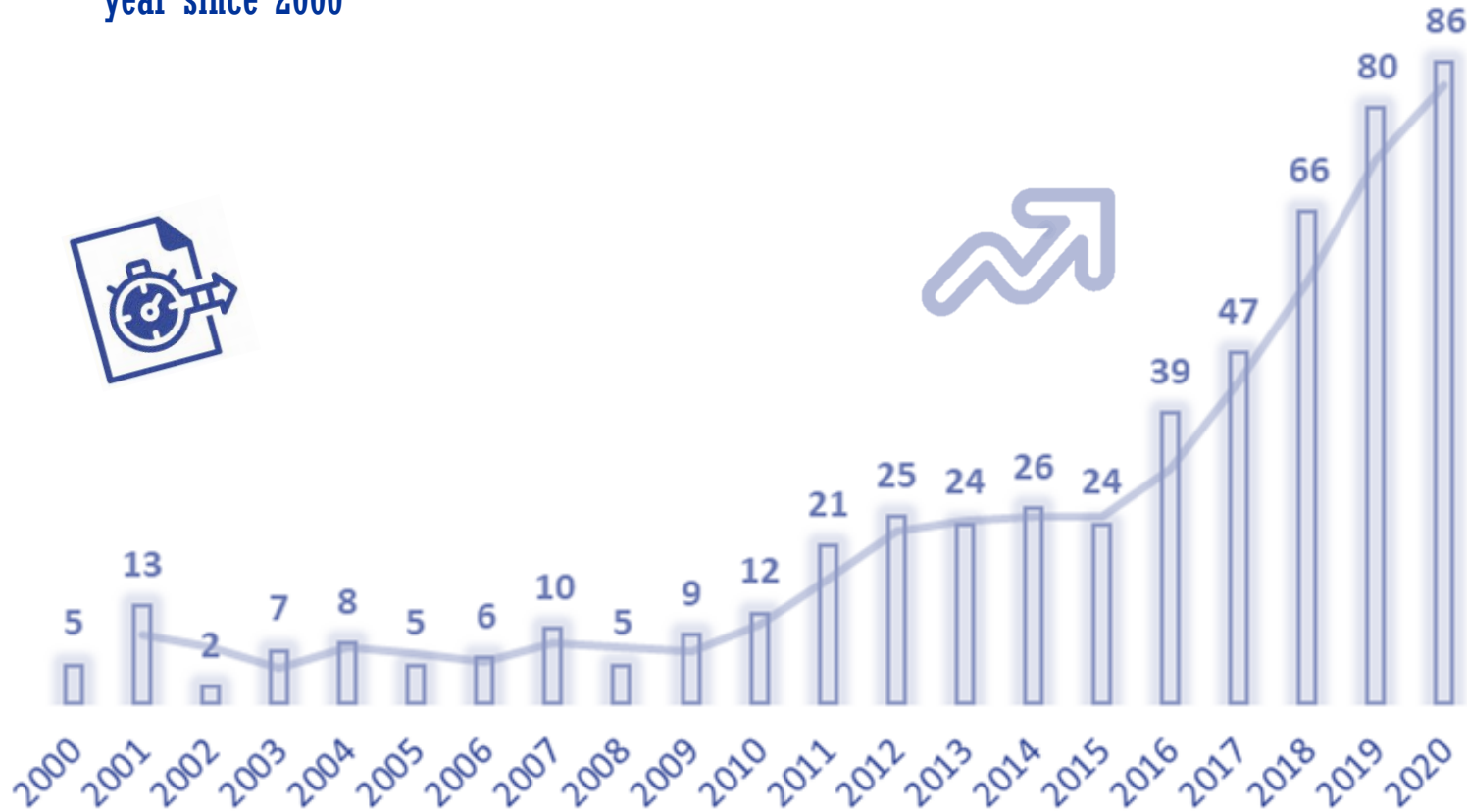
Based on UNESCO definition, MMM territory has **5,460 CCI establishments**
(about 5% of the economic community)

Active businesses as of Dec. 31, 2020
(91% main offices) representing CCI sector
in MMM territory

750



Example for the city of Montpellier: number of companies created or relocated per year since 2000



555

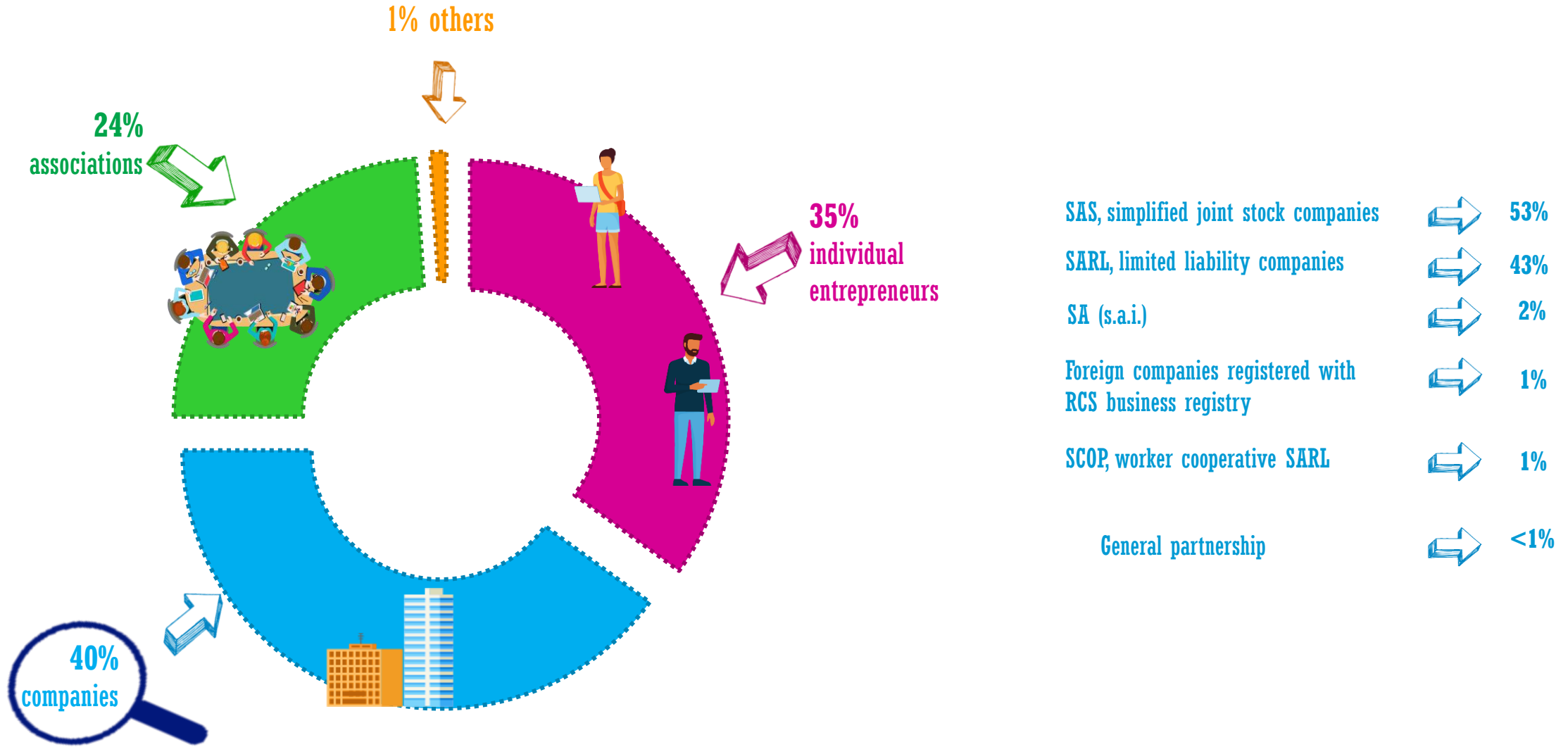
Active companies present in Montpellier at the end of 2020

+22%

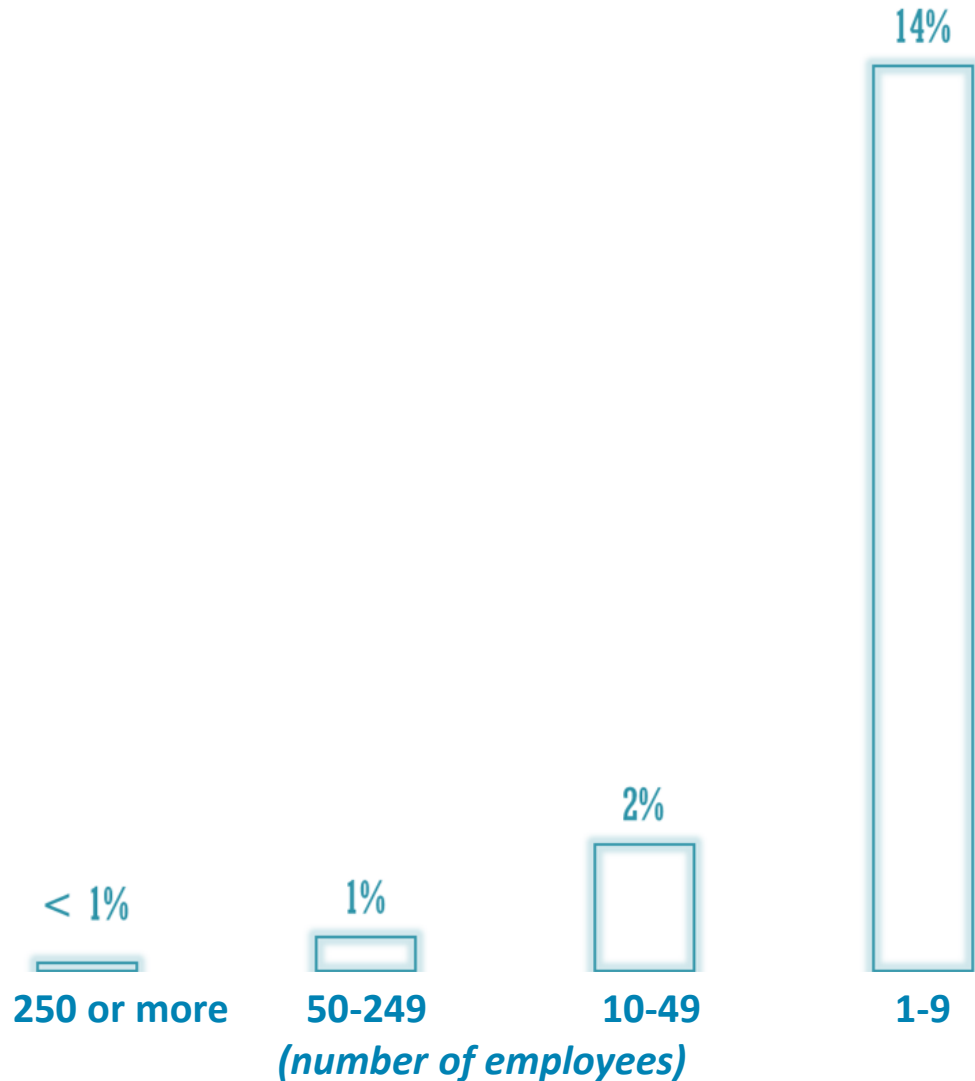
Since 2010, annual average progression of company creations and relocations



The trend is similar on a smaller scale in Montpellier Métropole's other cities



OPERATION IN PROJECT MODE WITH CYCLICAL JOB SPIKES



2,100 jobs*
counted in 2020
in our 4 target sectors



National figure for comparison:

1.2 M jobs
in CCI (UNESCO) in France
(source: E&Y – 2016 report)

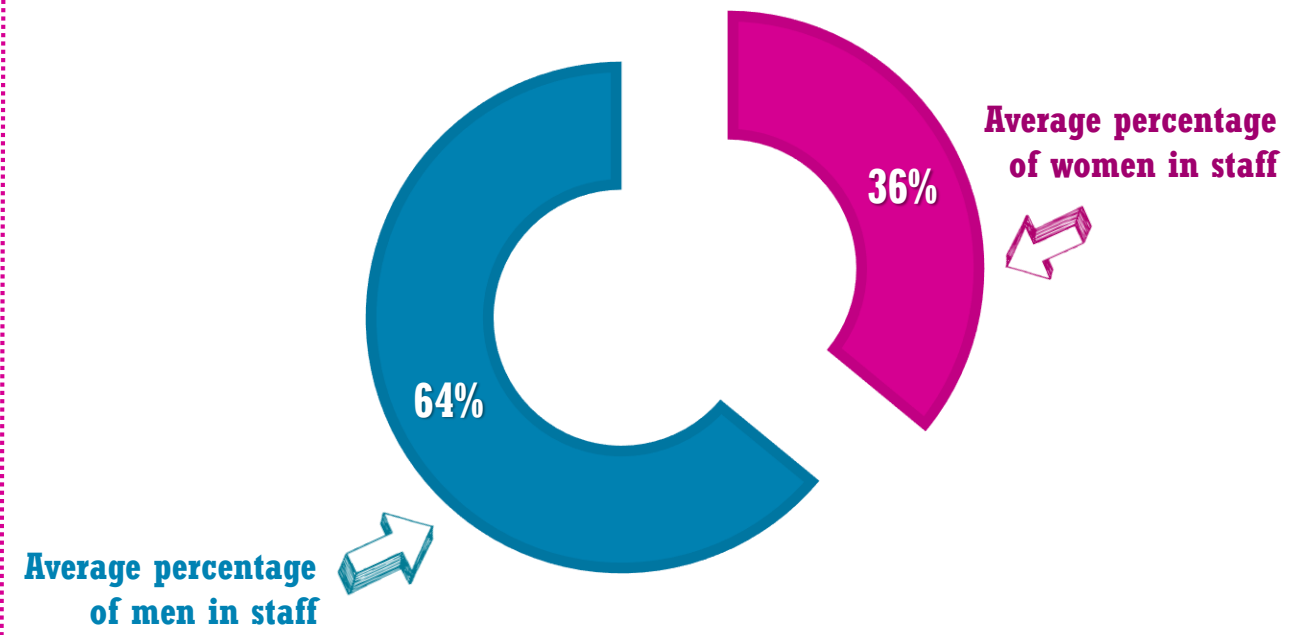
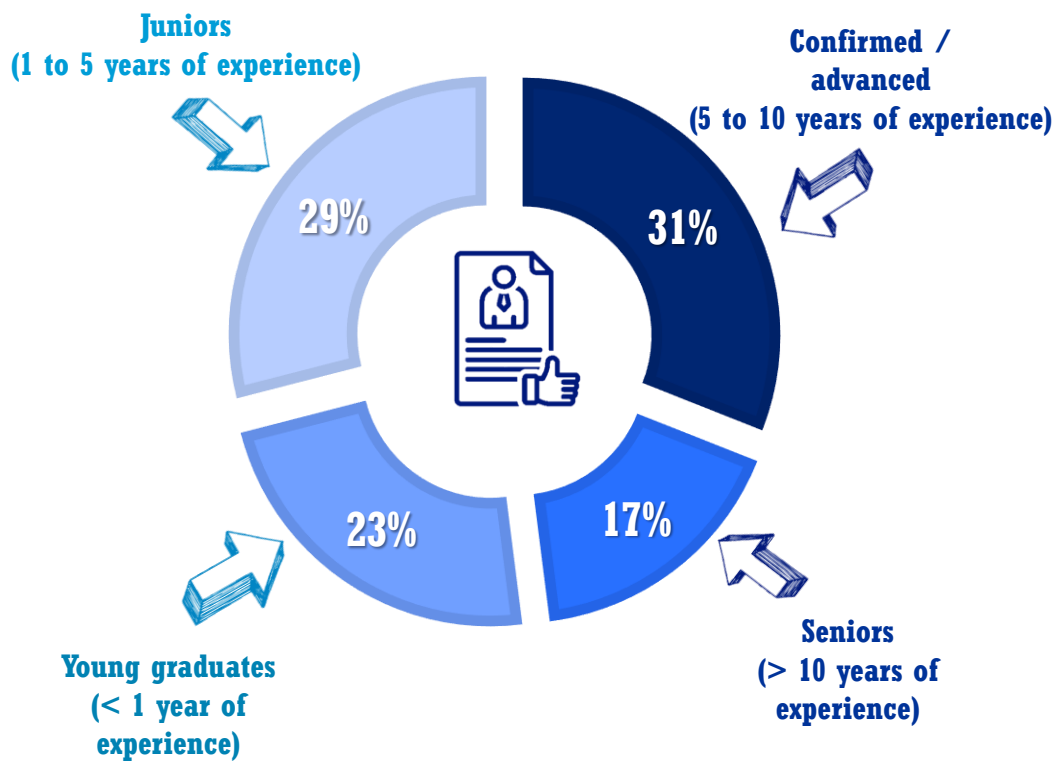
~ 7,500 employees
in the animation sector
France in 2018
(source: CNC)

+ 500-800 new jobs
in video games in France
(source: SNJV survey)

* 30% of which are individual entrepreneurs
or freelancers/independents




70%
of new CCI recruitment from local territory.
Additional training provided internally is offered in 66% of the cases.



Raising awareness about CCI professions must be encouraged from a very young age in order to remove obstacles and help female talents to emerge!

100 M€

Aggregated annual revenue estimated for 2020 (based on provided information, representing 4% of the companies operating in the territory)

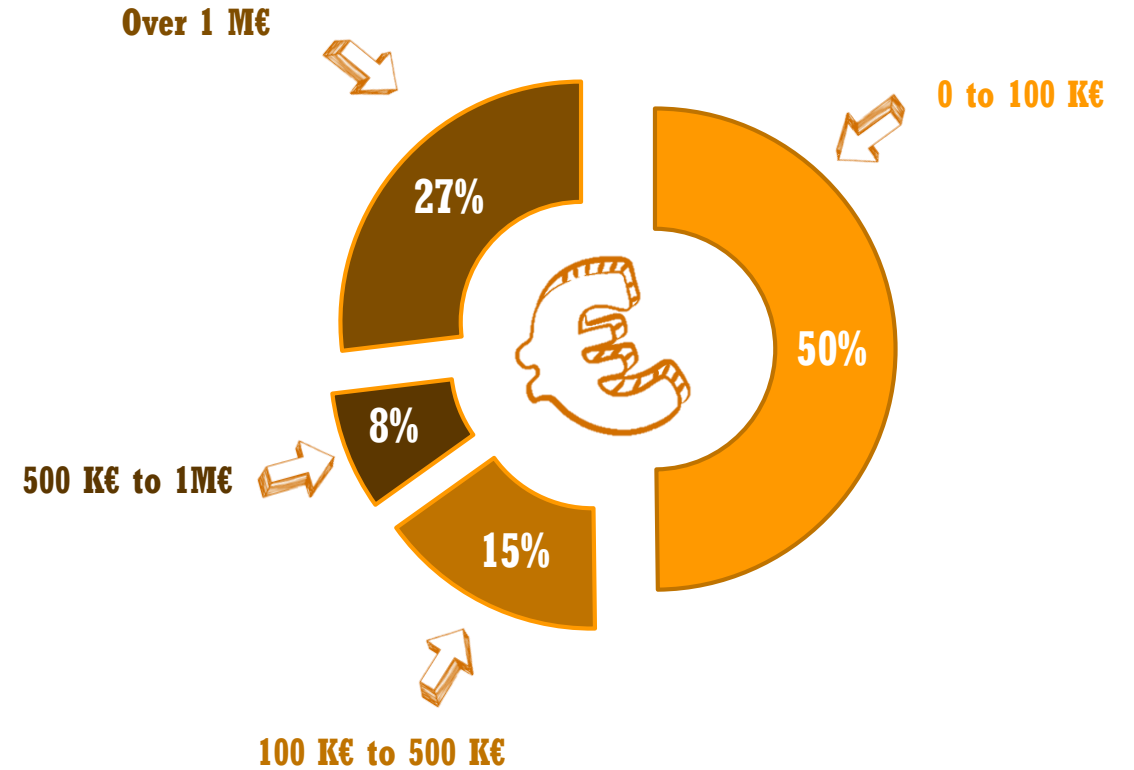
30%

of the companies benefited from aid in 2020 (creation, support from the Region, and assistance)

62%

of the companies recorded a downturn in business > -25% due to the health crisis*

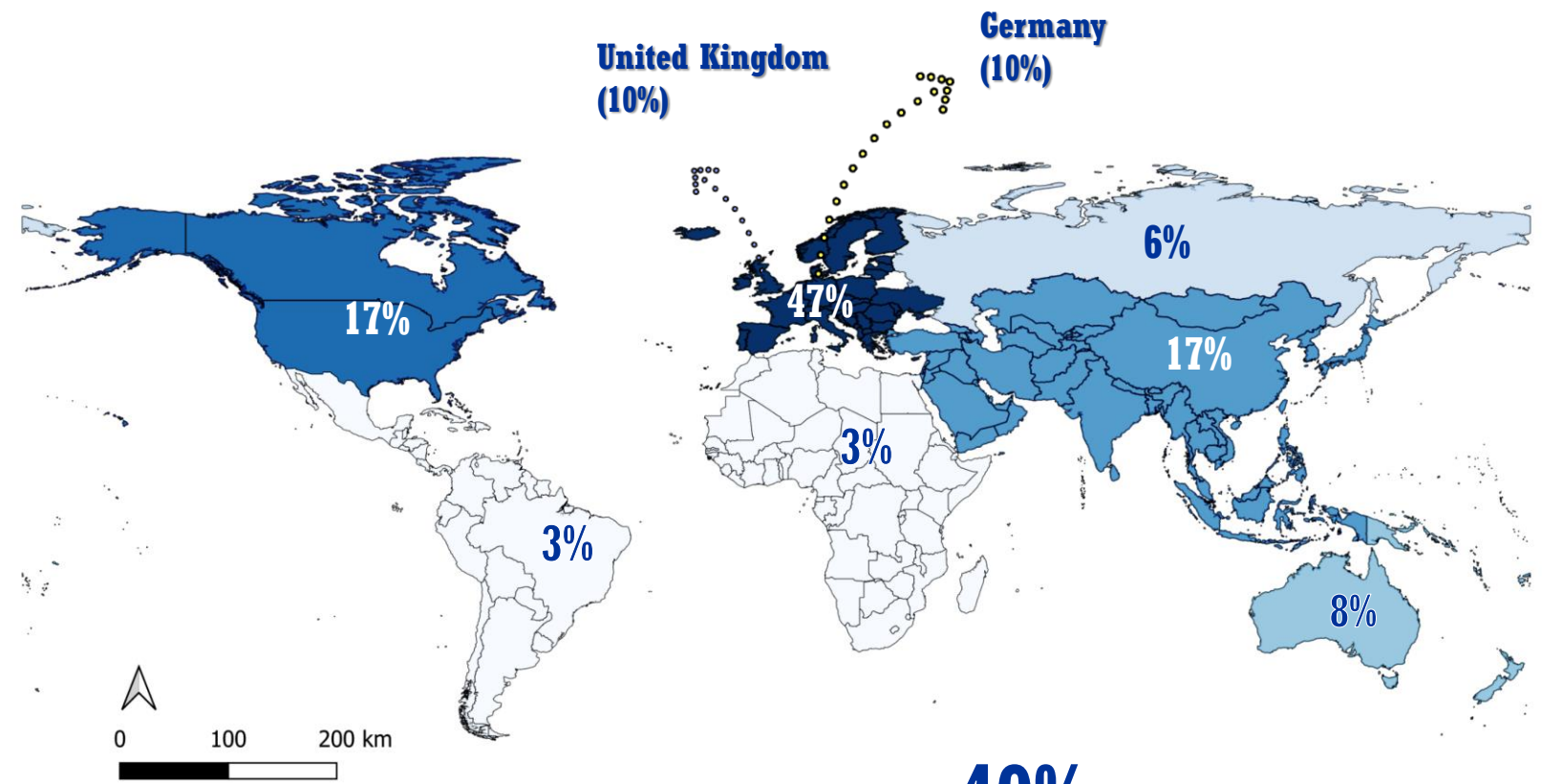
* In 2020, 78 companies operating in the Montpellier Métropole area definitively ceased their business activity before Dec. 31, 2020.



Source: "Économie & Territoire" data – Analysis based on 14 NAF codes

AMPLE ROOM TO MANEUVER FOR ADDRESSING INTERNATIONAL MARKETS

31%
of the local CCI stakeholders
exported their solutions, creations,
or services abroad in 2020

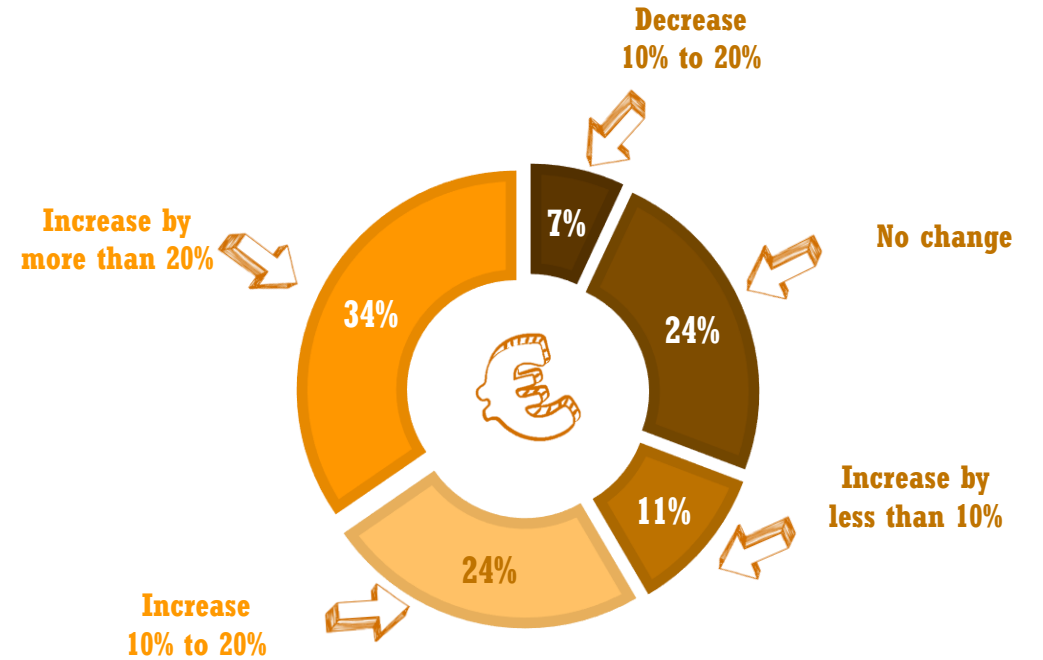
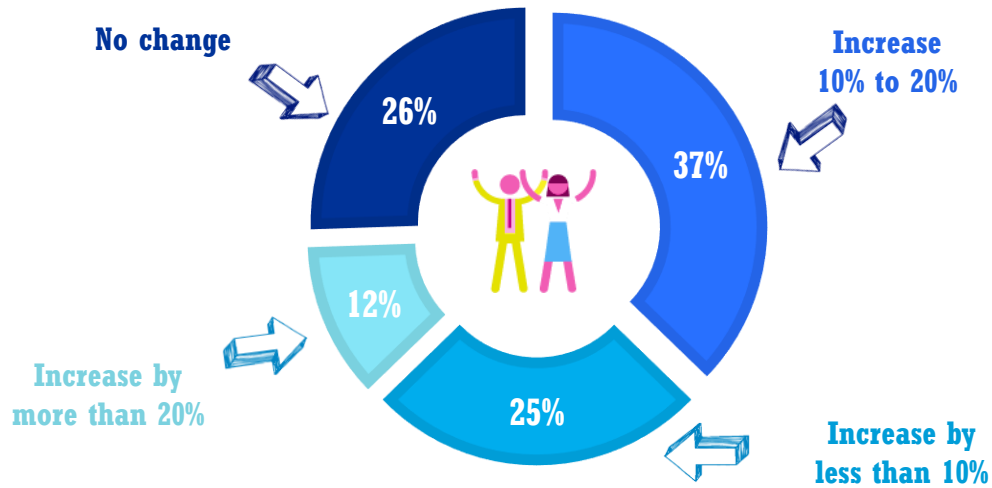


40%
Annual percentage of
revenue from exports

Source: Online survey conducted by Montpellier Métropole among territorial stakeholders

66%
of the CCI companies plan to increase their staff size for 2021

47%
of the stakeholders need new facilities



94%
of the CCI companies expect their revenue to grow and are relatively optimistic regarding 2021

(only 7% of the stakeholders expect revenue to decline in 2021)

Thank you
for your attention!

If you have any questions or would
like more information,
please feel free to contact
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