The Creative Ecosystem of the Philippines

National Diagnostic Report

dti MALIKHAING PINOY BAGONG PILIPINAS

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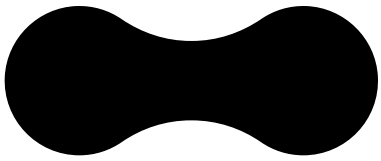

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This report was collaboratively prepared by the Department of Trade and Industry (DTI), the Philippine Statistics Authority (PSA), the Intellectual Property Office of the Philippines (IPOPHL), and the World Intellectual Property Organization (WIPO), reflecting a shared partnership and joint contribution to the development of this publication.

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Executive Summary

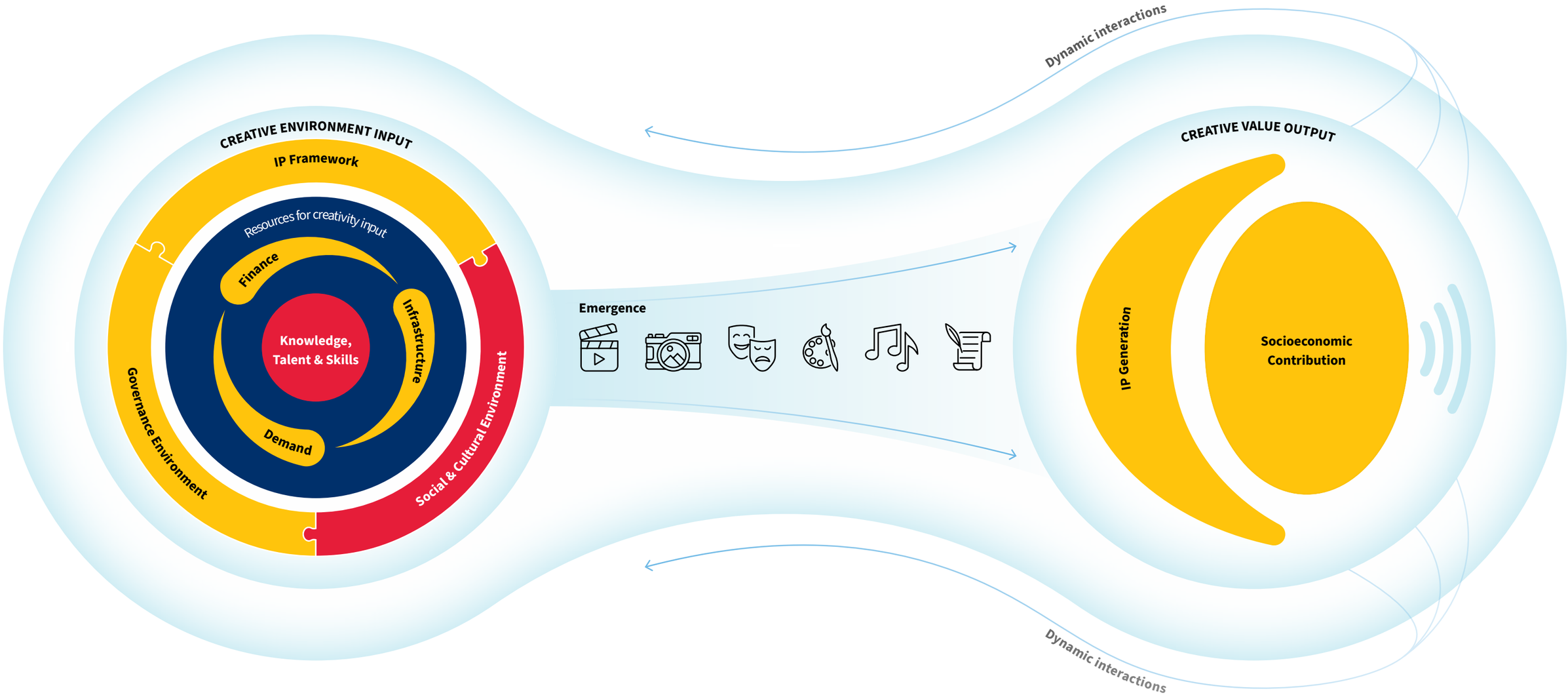

Figure 1.
Creative Ecosystem Diagnostics of the Philippines, Own elaboration.

Strength High Moderate Low

Overall maturity level

Environment for Creativity

IP Framework (Moderate)

Strengths

- Advanced digitization of IP registration and mediation systems.
- Innovative online enforcement mechanisms (site-blocking, e-commerce cooperation) with strong public–private cooperation.

Weaknesses

- Limited public awareness of digital IP issues.
- Persistent challenges in IP valuation and absence of a mature secondary market for intangible assets reduce lender confidence constraining IP-backed financing mechanisms.

Governance environment (Moderate)

Strengths

- Business readiness remains strong in firm entry and regulatory framework.
- Transparency, accountability, and citizen participation mechanisms have gradually improved through institutional reforms.

Weaknesses

- Rule of law has declined over recent decades compared to ASEAN peers.
- Declining academic freedom may constrain innovation capacity and long-term technological upgrading.

Social & cultural environment (Low)

Strengths

- Social cohesion is improving and gender inequality is gradually declining.
- High levels of digital engagement and cultural participation create strong consumption potential.

Weaknesses

- Creative capabilities are strong, but the appetite for risk-taking, business scaling, and IP ownership remain comparatively limited.
- Low IP awareness contributes to tolerance of piracy and weak incentives for domestic value capture.

Resources for Creativity

Knowledge, talent & skills (Low)

Strengths

- High education attainment and strong ICT/English capabilities.
- Multiple recent laws and national plans prioritize digital upskilling, creative workforce development, and lifelong learning.

Weaknesses

- Mismatch in skills and underutilization of talent remain significant.
- R&D investment remains below regional benchmarks. Creative patent applications are dominated by non-residents, reflecting dependence on foreign IP and limited Filipino-owned innovation.

Infrastructure (Moderate)

Strengths

- LTE/5G coverage and digital infrastructure continue expanding despite the country's archipelagic geography.
- Physical creative infrastructure such as museums, libraries, creative hubs, and galleries provides important cultural and market support.

Weaknesses

- Fixed broadband penetration and internet affordability remain below ASEAN averages.
- Strong regional inequalities persist in connectivity, logistics, and access to digital services.

Finance (Moderate)

Strengths

- Public support and institutional attention toward creative financing mechanisms are increasing.
- IPOPHL's leadership in IP valuation frameworks strengthens the foundations for IP-backed lending.

Weaknesses

- Foreign direct investment in arts and culture has sharply declined since 2020.
- Venture capital, IP monetization systems, and access to finance for creative MSMEs remain limited.

Demand (Moderate)

Strengths

- Strong digital engagement through streaming, gaming, and downloads.
- Strong exports in creative services.

Weaknesses

- High digital engagement does not translate into equivalent legal purchases or monetization.
- The country remains highly dependent on imported IP, foreign technologies, and imported creative goods.

Creative Value

IP generation (Moderate)

Strengths

- Copyright registrations and trademark filings are increasing.
- The institutional framework increasingly recognizes IP as a productive economic asset.

Weaknesses

- Commercialization and monetization mechanisms remain weak.
- Domestic ownership of IP remains comparatively low, with strong dependence on foreign technologies and content.

Socioeconomic contribution (Moderate)

Strengths

- Creative industries contribute significantly to GDP and employment.
- Robust performance in symbols & images, digital interactive and advertising sectors.

Weaknesses

- The sector remains highly labor-intensive, with relatively low productivity and widespread informality.
- Many creative workers remain concentrated in routine, lower-income, outsourced service activities rather than high-value Filipino-owned IP generation.

The Philippines is no longer merely participating in global creative value chains. The country is approaching a strategic threshold where it can increasingly generate, own, commercialize, and export Filipino intellectual property at scale. The long-term challenge is therefore no longer only expanding creative participation, but upgrading the ecosystem conditions that enable creative ownership, innovation, and value capture.

The Philippines has anchored its view of the creative industries as a national development priority through the Philippine Creative Industries Development Act (**Republic Act No. 11904 of 2022**). The Act strengthens inter-agency coordination through the Philippine Creative Industries Development Council (PCIDC), establishes a satellite account and industry database, and provides a comprehensive framework for developing and protecting the sector.

The Philippines pioneers the implementation of the Creative Economy Data Model (CEDM) developed by WIPO. This report presents the first national creative ecosystem diagnostic developed using the CEDM. Adapted to the Philippine context, the assessment examines the overall health of the country's creative ecosystem by analyzing its enabling environment, resource conditions, and measurable creative outputs.

The intellectual property (IP) Framework has improved considerably. Enforcement has become more effective and the Intellectual Property Office of the Philippines (IPOPHL) has undertaken a major digitization effort. Ongoing policy reforms further frame IP as a financial asset. They include initiatives to enable IP-backed financing and strengthen the broader innovation ecosystem.

Governance Environment is stable and conducive to business. However, **limited awareness of IP, entrepreneurship and creativity constrains the ecosystem**. Business registration frameworks perform comparatively well, but weakening rule-of-law indicators may denote increased long-term risk for investment, the quality of contract enforcement, and licensing-based business models, among others. Social and cultural foundations are underutilized. Improvements in gender equality signal stronger social cohesion, but indicators on creativity and entrepreneurial attitudes suggest that there is limited interest in experimenting or innovating. The lack of public awareness of IP may hinder value capture and weaken incentives for creative production.

Knowledge development and talent utilization remain key structural bottlenecks. The Philippines benefits from strong English proficiency and solid information and communication technology (ICT) capabilities among the population. That is conducive to integration into global creative service value chains, particularly in animation, game development, and information technology and business process outsourcing (IT-BPO) activities. However, labor market evidence indicates a mismatch between skills and job structures, leading to underutilization of talent and limited absorption of highly skilled labor. Although the level of research and development (R&D) is increasing gradually, it remains low by international standards.

Infrastructure is adequate, but financing mechanisms and domestic demand require adjustment. Hard infrastructure performs relatively well, despite the country's archipelagic geography. Digital infrastructure is improving, with comprehensive LTE and 5G coverage, but overall Internet access remains below global averages. Public financial support for creative activities has increased but remains modest. Financial institutions are reticent to accept IP assets as collateral. Foreign direct investment in the creative sector has declined, indicating reduced relative attractiveness. Demand dynamics are mixed: digital engagement is high and the Philippines is a net exporter of creative services, yet household spending on creative products is low and the country remains a net importer of IP services. This indicates a lack of domestic capacity to generate and commercialize Filipino-owned IP, that is, to transform IP assets into economic value through licensing, technology transfer, franchising, content distribution, merchandising, joint ventures and other market-based applications.

Creative economy outputs show resilience, with stable value added and a recovery in employment following the pandemic. However, productivity gains remain limited. The sector's relatively high share of employment, compared with its modest contribution to gross domestic product (GDP), suggests a labor-intensive and low-productivity structure. The number of trademark filings in the creative sector is rising but commercialization mechanisms are uneven.

The Philippines is well positioned to move from a global service provider to a higher-value partner in the creative economy. Overall, the sector is advancing institutionally and is economically significant. However, long-term improvement requires stronger domestic IP generation, improved digital enforcement and commercialization, a higher intensity of R&D and a shift from routine service provision to higher-value, innovation-driven production. Converting strong export participation into Filipino-owned IP and scalable business models will be critical to enhancing competitiveness and building sustainable creative industries. Future policy should therefore be focused on the transition from fee-for-service production to ownership-based, creative business models.

Forewords

The creative economy is a vital engine of growth, innovation and cultural vibrancy. In the Philippines, it generates jobs, supports creators and promotes national identity. But realizing its full potential requires more than measuring creative outputs – it calls for a deep understanding of the country's creative ecosystem.

This National Diagnostic Report helps Philippines take this crucial step. As the first application of WIPO's Creative Economy Data Model, it provides an integrated picture of the institutions, skills, infrastructure and markets that shape creative value. It also underscores the pivotal role of intellectual property in building confidence for investment, supporting commercialization and ensuring long-term sustainability.

The findings highlight both strengths and opportunities: developing talent, stimulating domestic demand, and strengthening data systems for evidence-based policy. These are essential conditions for unlocking the full potential of the creative economy.

We hope this report becomes more than a reference and sparks dialogue, drives bold strategies and deepens collaboration across government, industry, and creative communities. By investing in creativity, the Philippines can harness one of its greatest assets -the imagination of its people- to drive inclusive and sustainable growth, as well as shape a future where innovation, creativity and culture move hand in hand.

DAREN TANG
Director General
World Intellectual Property Organization (WIPO)

The Department of Trade and Industry (DTI), through the Philippine Creative Industries Development Council Secretariat, presents the *Philippine Creative Ecosystem National Diagnostic Report.* This diagnostic provides an objective outlook on where our creative economy stands so we can strategically map and navigate its future.

Driven by a shared commitment to holistically understand the national creative economy through a coherent data management system as well as our enduring partnership among the Intellectual Property Office of the Philippines (IPOPHL), the Philippine Statistics Authority (PSA) and the World Intellectual Property Organization (WIPO), this report delivers the critical insights necessary to formulate targeted policies, scale micro, small, and medium enterprises (MSMEs), and elevate Filipino talent on the global stage by adopting the Creative Economy Data Model (CEDM) developed by WIPO.

While newly recognized as a distinct sector, creative industries have historically been integral to our daily life, sustaining livelihoods, shaping culture, and expressing the country's identity. Today, it is a powerful engine capable of driving sustainable development, creating high-value jobs, and positioning the Philippines as Asia's premier creative hub. Fully unlocking its potential requires data-driven strategies and a deep understanding of our creative ecosystem.

MA. CRISTINA A. ROQUE
Secretary
DTI

More than a source of cultural pride, the Philippine creative economy is a powerful engine of innovation and inclusive growth that is shaping our nation. As creativity boosts the Philippines' position in the global economy, we must also strengthen our ability to measure and understand the sectors that fuel the creative economy to enable us to better support them.

The National Diagnostic Report of the Philippine Creative Ecosystem, which utilizes the Creative Economy Data Model (CEDM) developed by the World Intellectual Property Organization (WIPO), marks an important milestone in the country's efforts to build a more evidence-based approach in advancing the creative economy. This report, which views the Philippine Creative Economy through the lens of the CEDM, reflects our shared commitment to generating reliable data that can guide policy, empower stakeholders, and create opportunities for Filipino creators and enterprises.

This initiative is the result of years of collaboration among the Intellectual Property Office of the Philippines (IPOPHL), our mother agency the Department of Trade and Industry (DTI), the Philippine Statistics Authority (PSA), and WIPO. We are confident this report will drive policies and programs that will enable Filipino creativity not only to thrive but also to prosper locally and globally.

ATTY. TEODORO C. PASCUA
Director General
IPOPHL

The creative economy has emerged as an important driver of innovation, cultural identity, employment, and sustainable economic growth across the globe. In the Philippines, the creative ecosystem reflects the country's rich cultural heritage, diverse talents, and dynamic industries that contribute to economic development, social inclusion, and national identity.

This National Diagnostics Report on the Creative Ecosystem of the Philippines provides an initial assessment of the current landscape of the Philippine creative economy. It examines the structures, stakeholders, opportunities, and challenges that shape the sector, while identifying areas where policy support, institutional coordination, and strategic investments may further strengthen the development of creative industries in the country.

The report recognizes the importance of official statistics in providing a sound basis for understanding the creative economy. Data from the Philippine Statistics Authority support the measurement of the sector's economic contribution, employment, and related indicators, helping policymakers and stakeholders assess trends, identify gaps, and develop more informed programs and interventions. Prepared in collaboration with the Department of Trade and Industry and the World Intellectual Property Organization, this report serves as a foundational reference for evidencebased policymaking and future initiatives for the Philippine creative industries.

It is hoped that this report will contribute meaningfully to efforts toward building a vibrant, inclusive, and sustainable creative economy for the Philippines.

CLAIRE DENNIS S. MAPA, PhD
Undersecretary
National Statistician and Civil Registrar General
Philippine Statistics Authority

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A brief Guide on How to Read this Report

This report follows a three-step ecosystem approach to understanding the Philippine creative economy:

1. Environment for Creativity

The report first examines the structural conditions that shape creative activity, including the intellectual property framework, governance environment, and broader social and cultural context in which creators and creative enterprises operate.

2. Resources for Creativity

It then analyzes the key resources that enable creative production and innovation, including talent and skills, infrastructure, finance, and market demand.

3. Creative Value

Finally, the report assesses the outputs generated by the ecosystem, focusing on intellectual property generation and the broader socioeconomic contribution of the creative industries.

Together, these dimensions provide an integrated diagnostic of the Philippine creative ecosystem, identifying both the country's strengths and the key constraints affecting long-term creative growth, innovation, and value capture.

Enjoy!

Methodological Note

This report follows an ecosystem diagnostic approach that combines quantitative analysis with contextual interpretation informed through stakeholder consultations. Statistical findings were discussed with national stakeholders to contextualize the evidence, validate interpretations, and incorporate sector-specific insights into the assessment of the Philippine creative ecosystem. Accordingly, the findings presented in this report reflect both the underlying quantitative analysis and the institutional dialogue conducted with national counterparts, particularly the Department of Trade and Industry (DTI), the Intellectual Property Office of the Philippines (IPOPHL), and the Philippine Statistics Authority (PSA). In particular, the PSA played a key role in providing, validating, and contextualizing national accounts data and other macroeconomic indicators relevant to the assessment.

For each component and element of the CEDM, composite indicators were constructed by aggregating relevant variables and data sources into synthetic measures designed to facilitate ecosystem-level interpretation and comparison. These indicators were subsequently visualized through radar charts to illustrate the relative strengths, asymmetries, and potential bottlenecks across ecosystem elements.

Building on the quantitative assessment and the broader policy context, DTI and IPOPHL jointly reviewed the relative performance of each CEDM element using a traffic-light prioritization framework intended to support policy dialogue and identify areas requiring differentiated levels of policy attention. Within this framework, red indicates high policy urgency, yellow indicates moderate urgency, and green indicates comparatively lower urgency for policy intervention.

1.
The Creative Economy in the Philippines

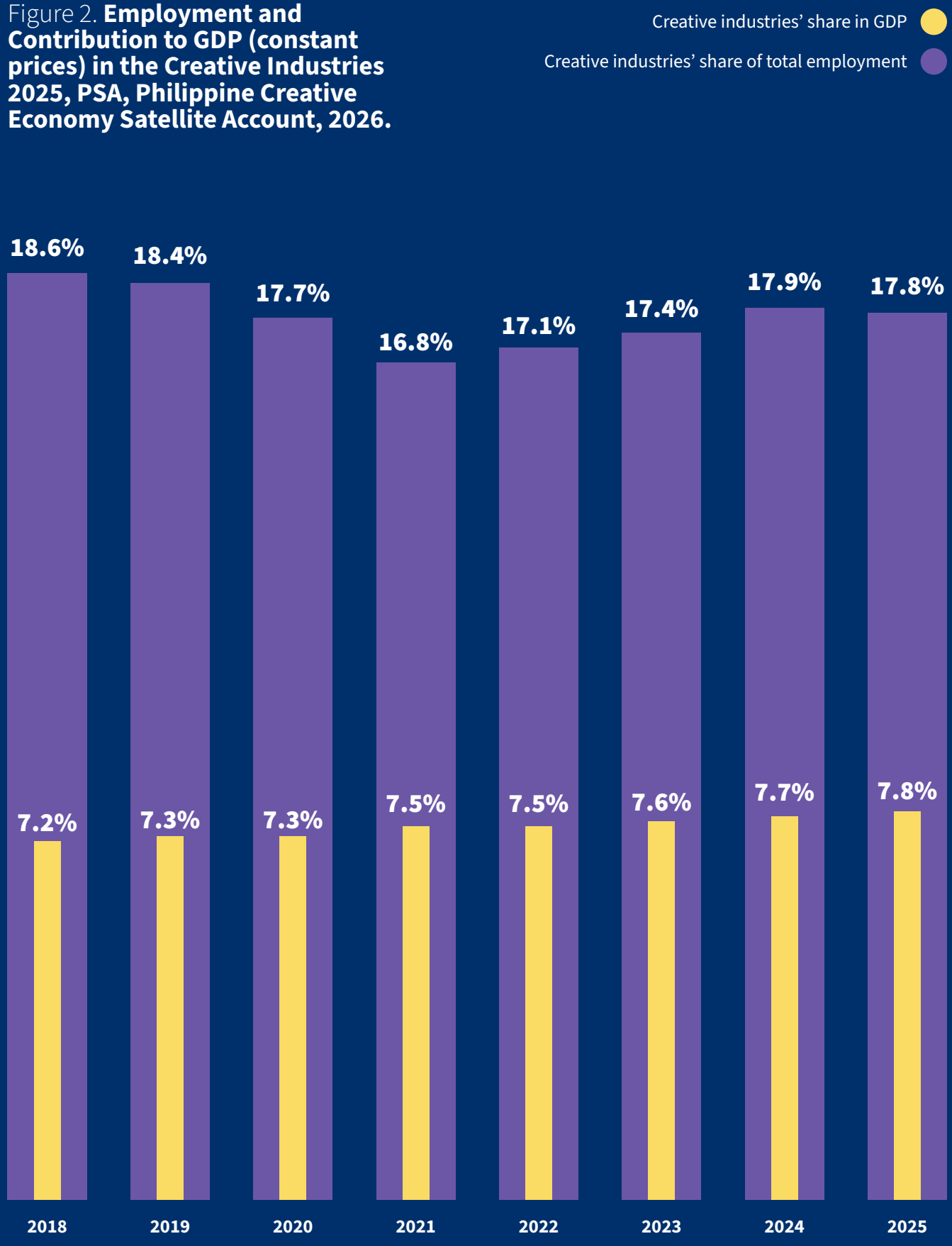
The Philippines has placed its creative industries high on the national agenda, aiming at becoming Asia's premier creative hub by 2030. The Philippine Creative Industries Development Act (PCIDA) recognizes creative industries as a key engine for sustainable economic growth for the country. Many organizations are now joining efforts under the Philippine Creative Industries Development Council (PCIDC), led by the Department of Trade and Industry (DTI) to improve conditions for creators and make the Philippines creative economy more innovative. The Act contributes to bringing together stakeholders and building a collaborative environment for local creatives and the government.

Among other priorities, the Act prescribes generating better and more regular data for the sector to construct a reliable information infrastructure that can shed light on the status quo of the creative industries and inform policymaking. One of the most important instruments in this context is the Philippine Creative Economy Satellite Account (PCESA), which is spearheaded by the Philippine Statistics Authority (PSA). Meanwhile, the approval of the Philippine Standard Creative Classification System establishes the official statistical classification for identifying, measuring, and analyzing the creative economy. It includes the classification of creative industries, creative goods and services, and creative occupations that serve as a guide for the compilation of the PCESA and the generation of other statistics related to creative industries (see Annex for Philippines' creative industry classifications).

Another key initiative underscoring the Philippines emerging leadership is the development of this report, the first of its kind under the new WIPO methodology: it moves beyond traditional output metrics to diagnose the creative ecosystem more holistically, providing strategic intelligence on the enabling conditions required for a thriving creative economy.

The PCIDA establishes the legal definition of creative industries, encompassing nine domains and reflecting a broad and inclusive understanding of the creative economy. Under this framework, the sector accounts for both substantial value creation and even higher employment levels, contributing 7.8% to GDP at constant prices and 17.8% to total employment in 2025 (fig. 2). The numbers underline the sector's weight for the country's economy (PSA, 2026b, 2026e).

Figure 2. **Employment and Contribution to GDP (constant prices) in the Creative Industries 2025, PSA, Philippine Creative Economy Satellite Account, 2026.**

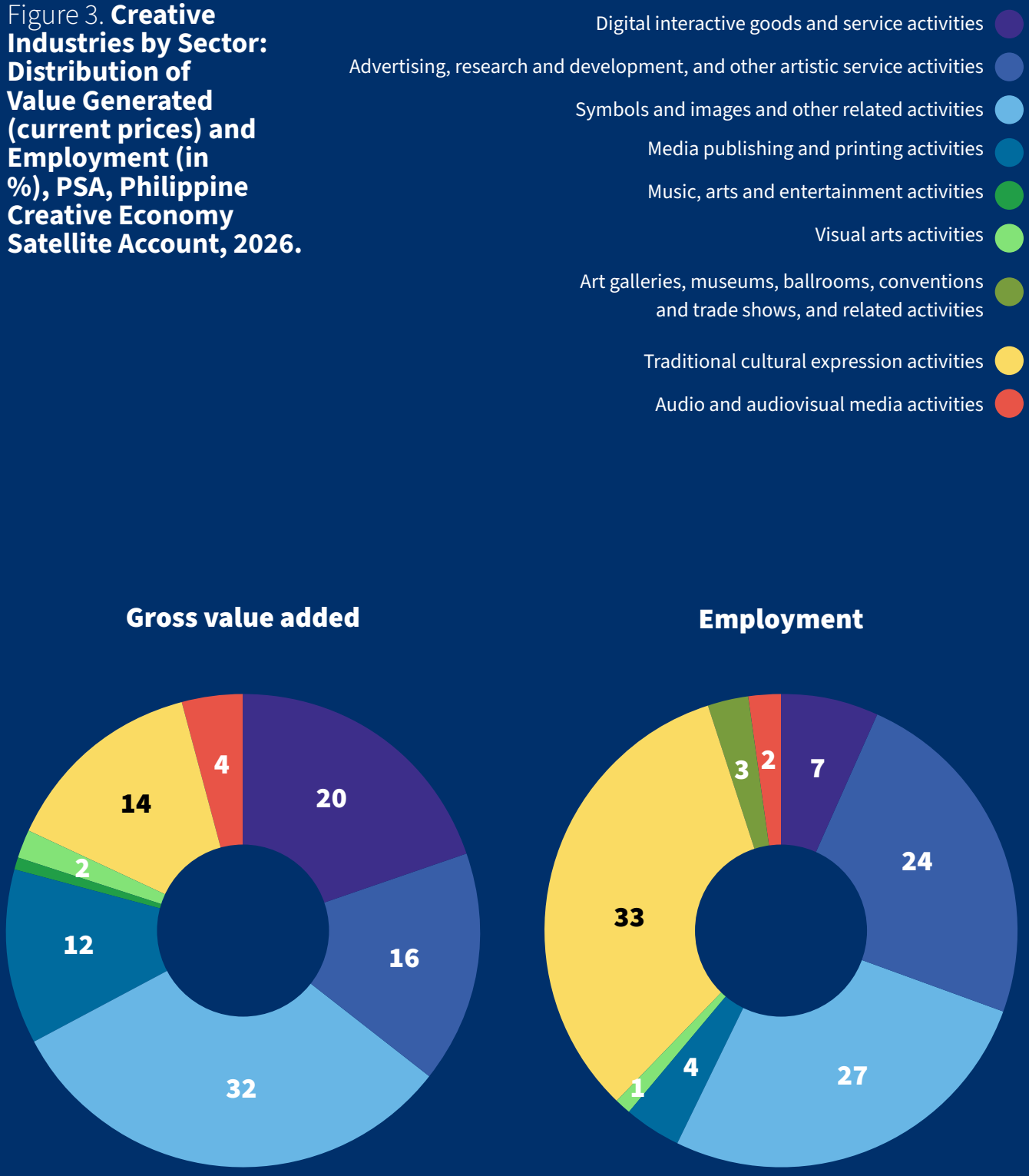


The creative economy is led by a few dominant industry groups in terms of value added. In 2025, "Symbols and images and related activities" accounted for the largest share, contributing 32% of total Gross Value Added (current prices). This was followed by "Digital interactive goods and services" with a 20% share, and "Advertising, research and development, and other artistic services," which contributed 16%, both at current prices (fig. 3) (PSA, 2026a).

The video game and animation industry stand out as among the most dynamic and promising segments of the Philippines' creative economy. However, they remain largely embedded within the broader IT-BPO sector. Despite their high productivity, up to 70% of activities consist of outsourced work for major foreign markets, particularly the United States. Low operational costs and a skilled, young, and English-proficient workforce, continues to attract foreign companies, especially for less creative and routine production functions (Game Developers Association of the Philippines 2022).

While the export-oriented creative service sector is well established, industry stakeholders increasingly emphasize the need to transition beyond service provisions. Key priorities include moving toward more innovative and creative activities, generating Filipino-owned IP, securing more sustainable revenue streams, and building a distinct national brand that can project soft power (ibid.).

Figure 3. **Creative Industries by Sector: Distribution of Value Generated (current prices) and Employment (in %), PSA, Philippine Creative Economy Satellite Account, 2026.**

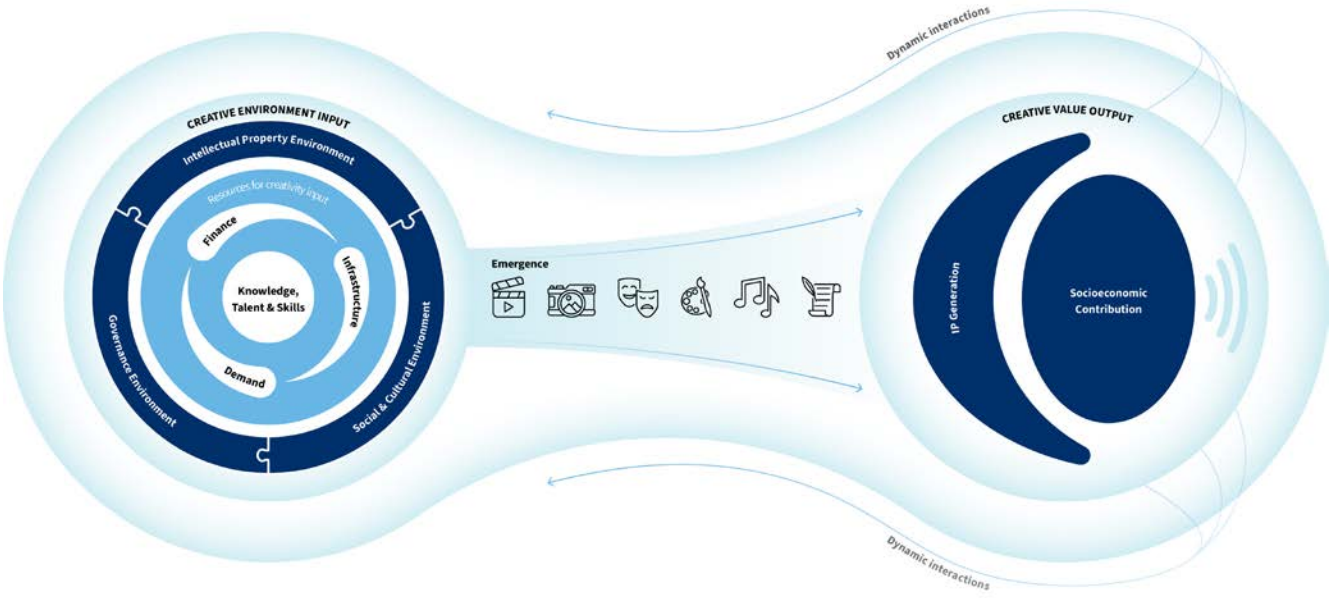


The Philippine Creative Ecosystem

This report adopts an ecosystem perspective to identify the key bottlenecks and constraints limiting the full potential of the Philippines' creative economy. It examines the interrelated conditions shaping the sector, focusing on both inputs and outputs. On the input side, it analyzes the structural environment in which creative actors operate, as well as the resources that enable creative production. On the output side, it distinguishes between productivity, innovation, and symbolic outputs to better capture the distinct types of value generated across the creative ecosystem.

WIPO's Creative Economy Data Model provides a structured framework to organize fragmented data on the creative industries and diagnose the Philippine creative ecosystem's strengths and weaknesses. By applying this lens (fig. 4), the report considers the full range of interrelated enablers shaping the sector. Simultaneously, it jointly examines legal and institutional structures and broader cultural and social dynamics, as well as talent and demand capacity, infrastructure, and financial resources to capture the complex system of the creative economy in a holistic way.

Figure 4. **WIPO Creative Economy Data Model CEDM, Own elaboration**



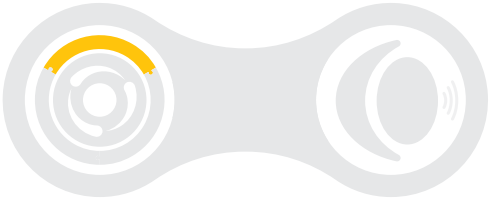
This report integrates data from a wide range of national and international sources to provide a comprehensive assessment of the Philippine creative ecosystem. Sector-specific information is drawn from key national institutions, including the DTI, the IPOPHL, and the PSA, along with other government agencies. It is complemented by internationally comparable data from international organizations such as the World Bank, the International Telecommunication Union (ITU), United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Labor Organization (ILO). By consolidating these fragmented data sources, the report constructs a cohesive analytical framework that reveals both the underlying conditions and performance of the Philippine creative ecosystem.

The report is structured in a stepwise manner to reflect the logic of the creative ecosystem. It begins with an analysis of the enabling environment, focusing on three elements: the Intellectual Property Environment, the Governance Environment, and the Social and Cultural Environment. It then examines the core resources of the ecosystem, beginning with human resources, followed by infrastructure, financial resources, and finally the demand capacity for creative industries. The creative ecosystem produces creative value, which is examined in Section 4 before concluding an overall evaluation of the system's health. The annex provides further detail on the methodology of the CEDM, as well as additional references, tables, and data for further analysis.

2. Environment for Creativity

The environment involves legal, formal, and soft institutional arrangements which provide the foundation for resources to be produced. These are structural to the system and can only be influenced in the long term. For the analysis of the Philippine creative ecosystem, the report focuses on three core environmental elements that underpin all creative activity: the IP framework, the governance structures of the country, and the social and cultural context in which creative entities operate.

2.1. Intellectual Property Framework



A robust IP framework acts as both the institutional anchor and growth engine of the creative economy. It governs the conversion process by codifying raw creativity into legal rights, transforming those rights into tradable intangible assets, and ultimately enables their scaling into sustainable business models and global cultural influence.

The IP institutional environment in the Philippines is strategically designed to transition the country from a mere consumer of creative content to a premier regional hub for original creative output. This transition is driven by a three-pronged strategy: legislative modernization that repositions IP as a financial asset, administrative digitization through IPOPHL's streamlined services, and enforcement network via the National Committee on Intellectual Property Rights (NCIPR).

Legislative Architecture: Towards Financial Assets

The Philippines' transition toward an IP-driven creative economy is anchored in a strengthened legal framework that promotes the commercialization of intellectual property. These shifts are underpinned by the PCIDA (RA 11904), moving towards positioning IP as an economic asset. Section 16 of RA 11904 explicitly mandates government-linked financial institutions to prioritize credit assistance and guarantee schemes for creative industries, subject to applicable regulations.

Complementing these national efforts, IPOPHL is leading a key regional initiative on IP valuation and commercialization. It is spearheading the development of the ASEAN IP Valuation Manual, which aims to establish a harmonized framework for assessing the monetary value of IP assets across ASEAN Member States. This initiative promotes the adoption of internationally recognized valuation methodologies, such as cost-based, market-based, and income-based approaches, tailored to the nature and maturity of the IP asset. Reliable IP valuation mechanisms are also essential to improve commercialization outcomes by enabling licensing negotiations, investment readiness, technology transfer, and the use of IP assets in blended financing arrangements.

Governance Consolidation: From Administrative Efficiency to Market Dynamism

IPOPHL has made noteworthy progress in digitalizing and streamlining its IP registration system, including end-to-end electronic processing, from online filing and payment to grant. Bureau of Copyright and Related Rights (BCRR) re-engineered the logistics of copyrights certification. By implementing a 100% online, full-cycle digital processing model and an e-certificate system, the Bureau has increased its capacity to process the increasing volume of copyright registration applications over the years.

Enforcement Evolution: From Physical Crackdowns to Digital Realms

IP enforcement in the Philippines has undergone a strategic shift toward addressing challenges in the digital environment. While traditional physical enforcement remains relevant, increasing emphasis is placed on combating online infringement, where risks are more complex and rapidly evolving. The country's sustained progress is reflected in its exclusion from the United States Trade Representative (USTR) Special 301 Watch List for twelve consecutive years and its absence from the European Union's IPR Watch List since 2019, both signaling profound international recognition of improvements in IP protection and enforcement.

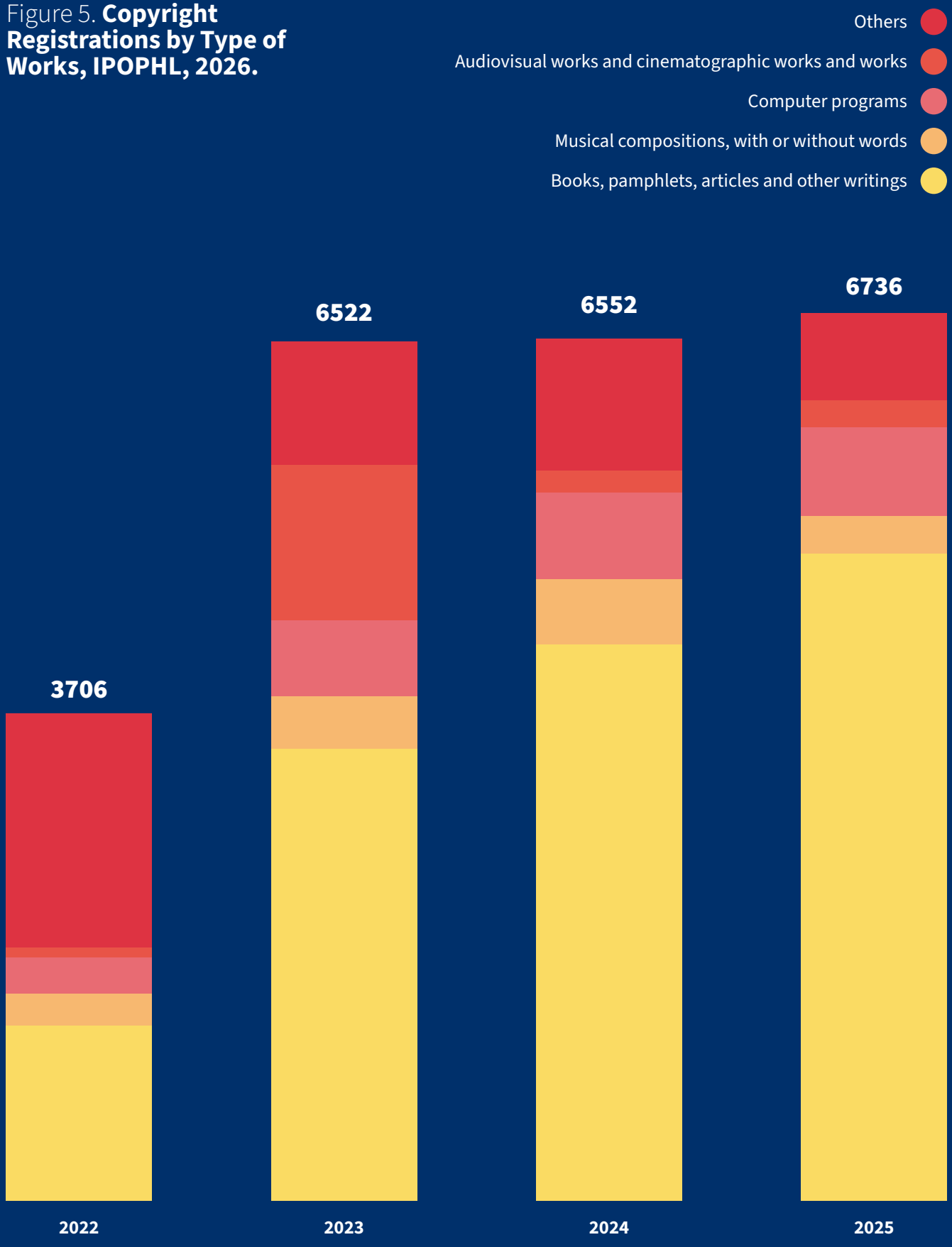
To further strengthen digital enforcement through public-private collaboration, IPOPHL Memorandum Circular No. 23-025 came into effect in late 2023. Developed in collaboration with the National Telecommunications Commission (NTC) and major Internet Service Providers (ISPs), the circular establishes a mechanism allowing IPOPHL to direct ISPs to disable access to infringing websites, domain names, or URLs upon verified complaints from rights holders. Implementation is supported by Memorandum of Understanding (MOUs) on eCommerce between Platforms and Brand Owners, Industry Associations and Chambers of Commerce (also known as the Code of Conduct in eCommerce) as a complement to the Republic Act No. 11967 or the Internet Transactions Act (ITA). ITA is expected to encourage the use of e-commerce by providing safeguards for both businesses and consumers. Section 2 of the law includes upholding intellectual property rights as part of governing online transactions and electronic commerce in the Philippines. In addition, Section 26, which refers to Subsidiary Liability of E-marketplace or Digital Platforms, states that e-marketplaces and digital platforms may be held liable if they fail to act expeditiously to remove or disable access to goods or services that infringe someone else's intellectual property rights upon proper notice.

IPOPHL complements the ITA by overseeing collaborative efforts to combat online infringement through the MOU on eCommerce. The MOU was introduced in 2021 as a temporary measure and now supports ITA`s implementation. It aims to establish a code of practice to address the proliferation of counterfeit and pirated goods on the internet, particularly in online marketplaces, and to enhance collaboration between and among the signatories. A key feature of the MOU is the establishment of an efficient and effective notice and takedown (NTD) mechanism, supported by commitments from both online platforms and brand owners.

The MOU includes a monitoring and evaluation framework led by IPOPHL to ensure its effectiveness and continued development. This system allows for regular assessment of the agreement's implementation, progress, and overall performance, as well as consideration of potential expansion. As of now, MOU has gained broad support, with a total of 112 signatories.

Rising engagement with the IP system and emerging shift toward monetization. Figure 5 shows an unprecedented surge in copyright registrations, reaching a record 6,736 in 2025, an increase of over 80% from 2022, which is inseparably linked to the digitization and streamlined registration, alongside IPOPHL's integrated awareness strategies, such as the Copyright Plus program and National IP Month celebrations. Copyright registration figures should be interpreted not as an absolute measure of creative output, but as a barometer of engagement with the formal IP system. However, the marginal increase of approximately 2.8% in 2025 indicates that the "procedural dividend" likely has reached a saturation point (IPOPHIL, 2026a).

Figure 5. **Copyright Registrations by Type of Works, IPOPHL, 2026.**



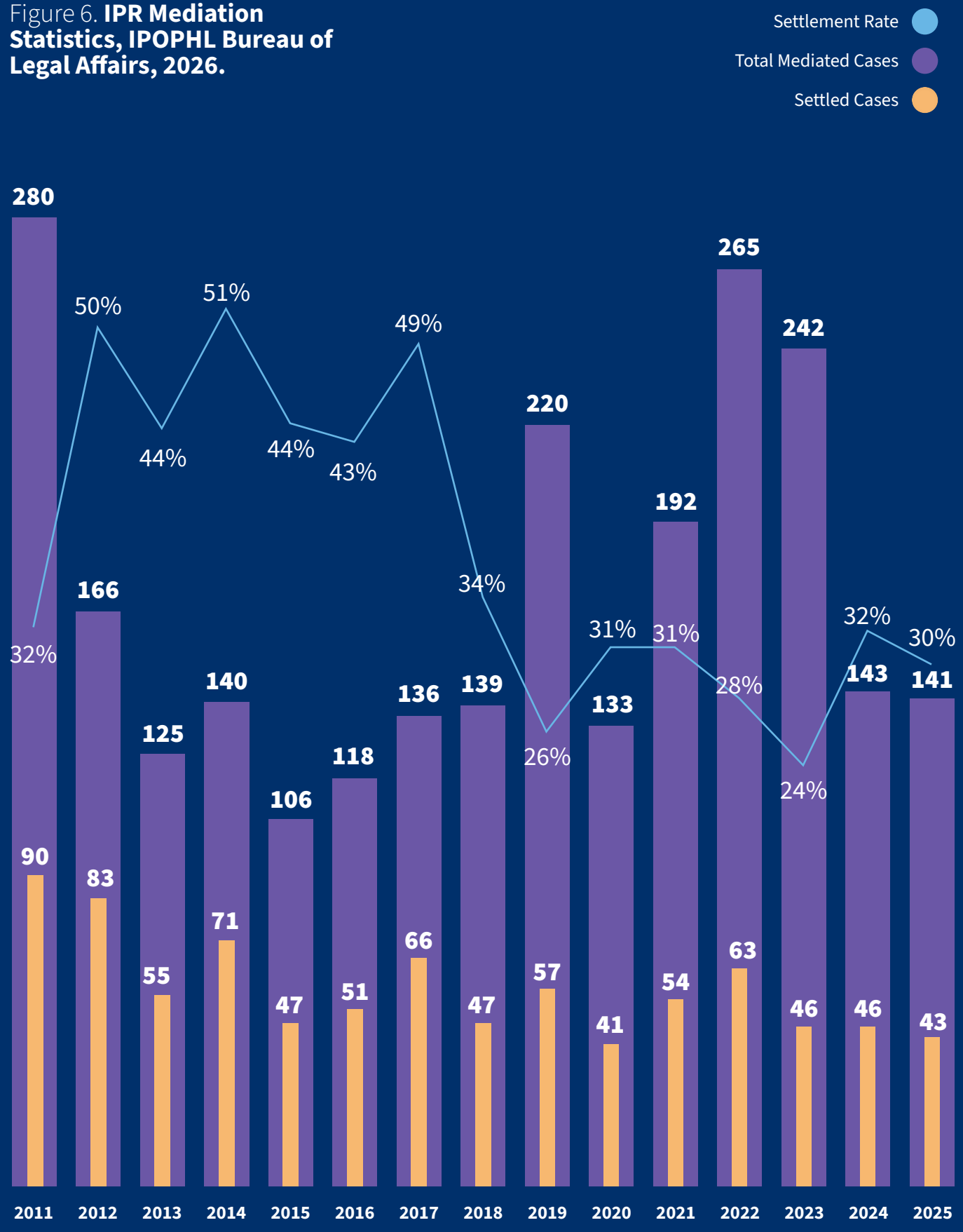
The effectiveness of revenue generation in collective management systems depends largely on the existence and proper functioning of collective management organizations (CMOs). First, a CMO must be established with a clear mandate to manage rights on behalf of right holders; second, it must operate efficiently, with sound governance, transparent rules, and the capacity to license uses, collect revenues, and distribute royalties. Where these conditions are met, licensing markets can develop and support revenue growth.

In the Philippines, the music sector illustrates this progression. According to the 2025 CISAC Global Collections Report, the Philippines ranks among leading smaller markets, with approximately 81% of collections originating from digital sources in 2024 (CISAC 2025). This growth is largely driven by the Filipino Society of Composers, Authors and Publishers (FILSCAP), a non-stock, non-profit association of composers, lyricists, and music publishers authorized to designate the public performance, adaptation, and mechanical reproduction rights granted by law to creators and owners of original musical works. The organization has implemented systems to support royalty processing and operates under updated distribution rules aimed at enhancing transparency and distributions to right holders. This development reflects the combined effects of market growth and an operational collective management framework supported by the legal environment.

Records (fig. 6) show that mediation achieved a 50% settlement rate in 2017 and consistently maintained settlement outcomes within the 24% to 35% range in the succeeding years, demonstrating Alternative Dispute Resolution (ADR) continuing effectiveness as a mechanism for the amicable resolution of IP disputes. The implementation of mandatory mediation for IP cases under IPOPHL Memorandum Circular No. 008, Series of 2018, also increased both the volume and variety of disputes referred to mediation, including cases that parties might not have voluntarily submitted to the process before, which likewise affected overall settlement outcomes. Notably, the increase in settlement rate from 24% in 2023 to 32% in 2024 suggests that recent procedural reforms and the transition to a fully digitized mediation framework have begun to strengthen the viability of the mechanism. Meanwhile, the settlement rates in 2024 and 2025 may likewise be viewed in light with IPOPHL Memorandum Circular No. 2024-007, which made mediation for appeals before the Office of the Director General optional, thereby affecting the number and composition of cases referred to mediation (IPOPHL, 2026b).

Overall, the Philippine IP framework has evolved into a more dynamic and economically oriented system, supported by legislative reforms, improved IP registration systems, and integrated inter-agency IP enforcement synergy. The Philippine Intellectual Property Strategy (PHIPS 2025-2030) has been launched to complement the National Intellectual Property Strategy (NIPS 2020-2025) by translating its priorities into actionable institutional, legislative, and sectoral measures and maximizing artificial intelligence (AI) and emerging technologies thereby aligning the country's IP policy with broader national development objectives.

Figure 6. **IPR Mediation Statistics, IPOPHL Bureau of Legal Affairs, 2026.**



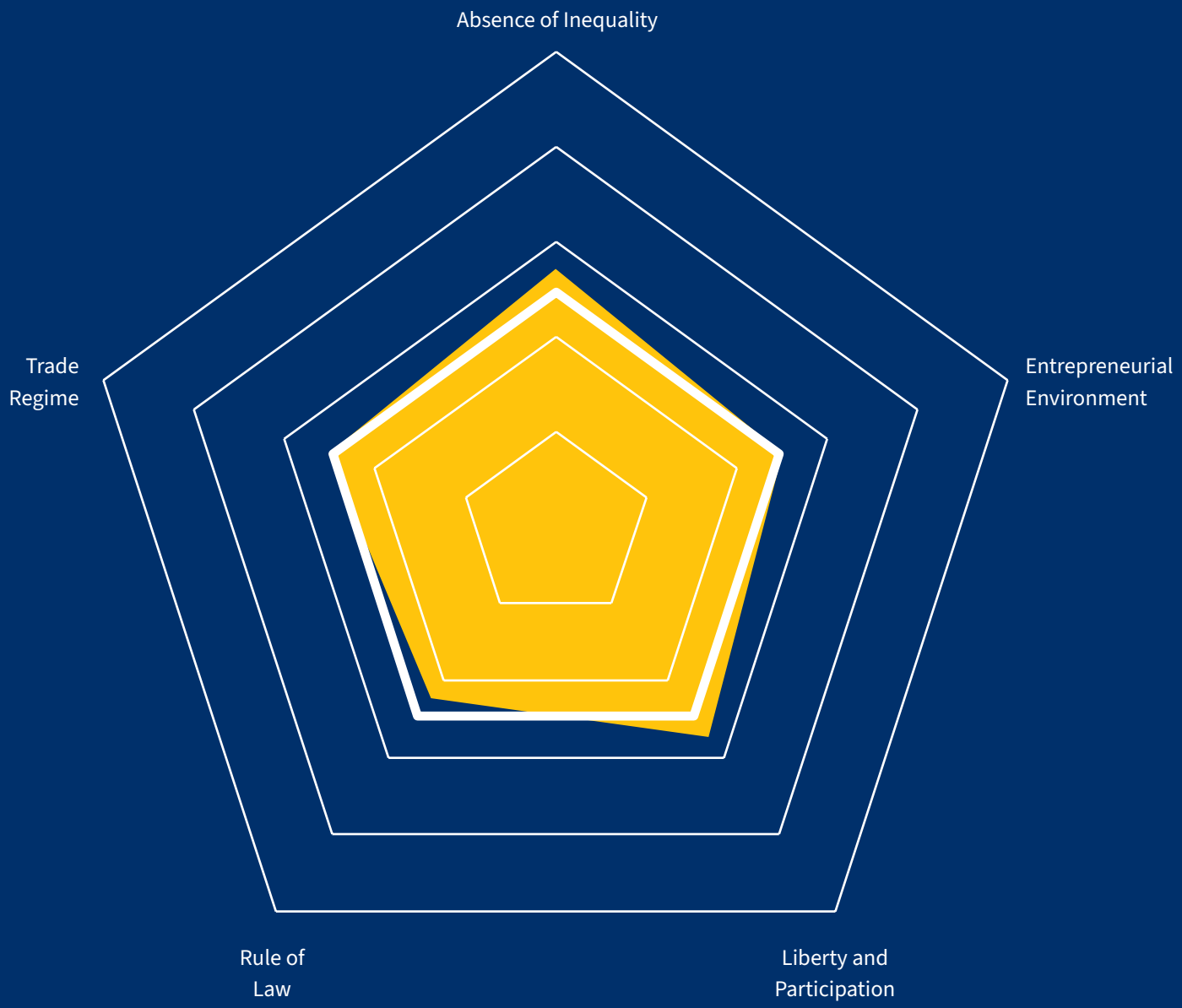
2.2.
Governance Environment

A well-functioning governance environment anchors the creative ecosystem by providing a rule-based legitimacy for cultural and creative activity. Clear and enforceable rights reduce transaction costs and institutional risks, thereby fostering investor confidence and supporting more dynamic market activity. The governance environment of the Philippines is quite balanced (fig. 7).

Institutional stability with emerging constraints on knowledge and innovation. Most indicators assessed show a stable institutional environment, while the components of Liberty and Participation, including press freedom and freedom of association, remain mostly constant at an average level, academic freedom has been declining in recent years. As the free production and circulation of knowledge are fundamental to research, innovation, and creativity, such developments could gradually constrain the Philippines' ability to generate or adopt innovative ideas, technologies, and creative outputs. Over time, this could limit progress in industrial upgrading and economic diversification, particularly in sectors that rely on knowledge-intensive and innovation-driven activities.

Economic structural transformation in the country has shifted from low-income sectors such as agriculture toward higher-income activities, including capital-intensive services and parts of the creative industries. This shift is also visible in the decline in income and consumption inequality among households (see Box 1). This becomes evident in the steady decline of the Gini-Coefficient over the past two decades measuring the wealth and income disparities in the country, which follows the global pattern of declining inequality (World Bank, 2025a).

Figure 7. **Radar Chart on the Governance Environment of the Creative Ecosystem, Own elaboration based on data from Composite Indicators Table, Governance.**

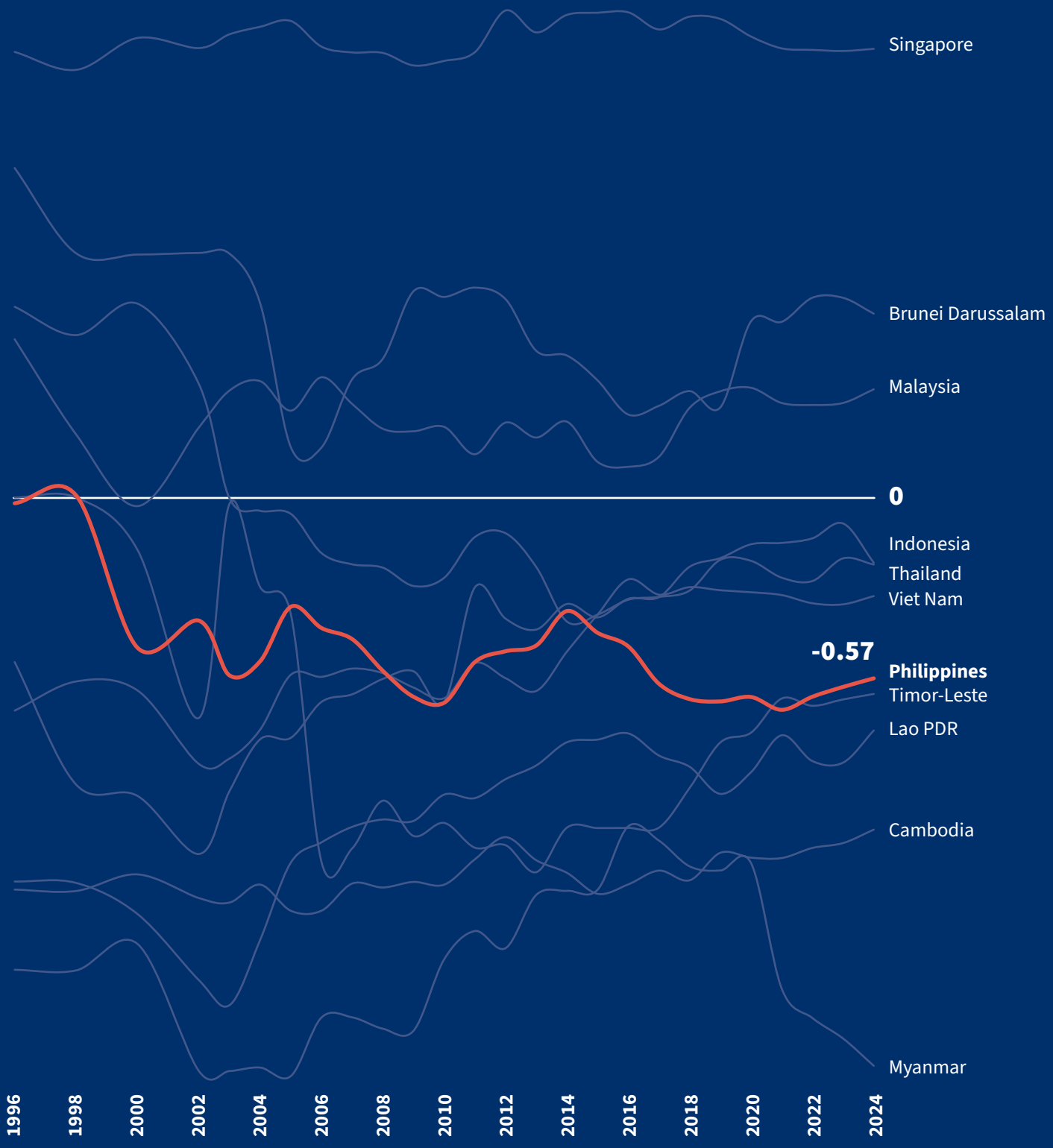


Informality as a structural feature of creative production and a persistent data gap. While informality is an important dimension of inequality, affecting both income distribution and productivity, it could not be fully captured in this analysis due to the lack of comparable and up-to-date national data. Nonetheless, informality remains a critical factor influencing labor market dynamics and social protection. Several conversations with national stakeholders revealed that informality is structural to production processes in the creative industries in the Philippines. At times, even technology-intensive and complex creative production, such as video game development, takes place under informal arrangements. However, better and more systematic data on informality is needed to fully understand production and innovation processes in the sector.

Rule of law as a foundational constraint for creative and industrial ecosystems. The performance of the Philippines on the rule of law over the past 30 years shows a continuous decline in the index. Global data suggest that most countries have experienced a decline in rule of law indicators, reflecting weaker perceptions of legal certainty, contract enforcement, and institutional reliability (World Justice Project, 2025). The Philippines follows this global pattern and, in comparison with other ASEAN countries, ranks in the lower third (fig. 8) (World Bank, 2025b).

Rule of law constraint increasing transaction costs and limiting industry collaboration. A low level of rule of law reduces regulatory predictability and increases risks for long-term domestic and foreign investment. In sectors such as the creative industries, where contracts, licensing, and access to judicial recourse are central, these weaknesses can increase transaction costs and risk premiums, thereby limiting international collaboration and industrial restructuring. Consultation with the Game Developers Association of the Philippines indicates a disincentive to engage with domestic firms, due to recurring delays in payments, lengthy licensing processes, and backend-heavy revenue models.

Figure 8. **Rule of Law Estimate ASEAN, World Bank, 2025. Estimate (-2.5 to 2.5)**



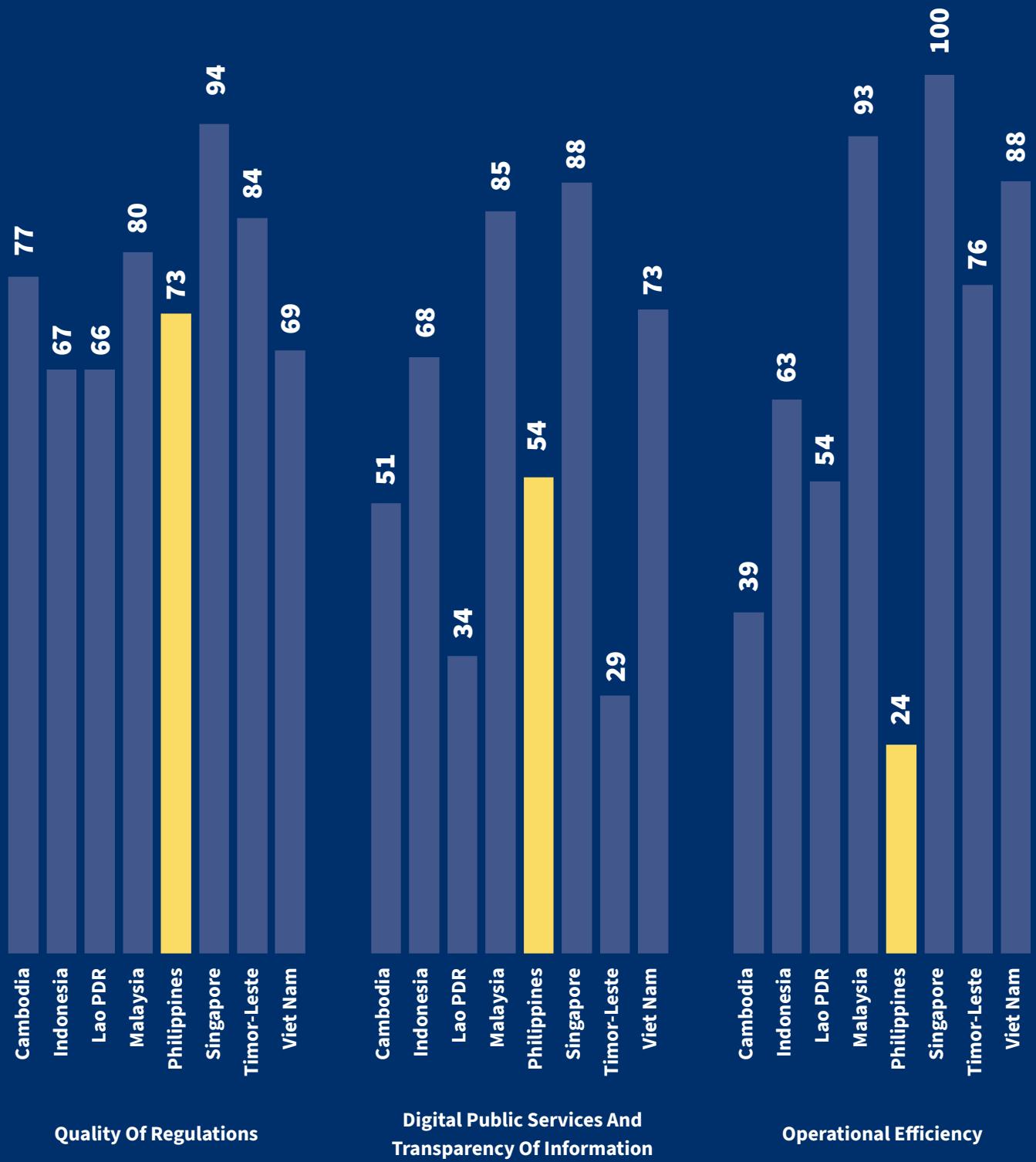
Business environment as an enabler for MSME-led creative growth. Another critical component of the governance framework is the business environment, particularly given the predominance of micro, small, and medium enterprises (MSMEs) in the creative industries, especially at early stages of workforce entry and firm development. For these enterprises, as well as for other innovation-driven ventures, a supportive and entrepreneurship-friendly ecosystem is essential. This requires an accessible, efficient, and predictable regulatory and operational framework that facilitates the full lifecycle of firms, from establishment and daily operations to scaling and eventual closure, thereby lowering barriers to entry, reducing compliance costs, and enabling sustainable business development within the creative economy.

Business readiness and regulatory strengths in enterprise formation. The World Bank's B-Ready 2024 indicator provides a snapshot of business readiness in the Philippines relative to other countries in Southeast Asia. The data (fig. 9) indicate that the Philippines performs relatively well in terms of its regulatory framework for enterprise registration, ranking above the regional average (World Bank, 2024). The Special Economic Zone Act of 1995 provides a relevant example, offering fiscal benefits and tax incentives to companies establishing BPO operations in the country.

Strengthening institutional support, regulatory compliance mechanisms, and the quality of public services and infrastructure will be essential to improve overall business conditions. However, the Philippines ranks at a mid-range level in public service quality and operational efficiency, indicating that while formal regulations for firm entry and exit are relatively well developed, implementation gaps and service delivery constraints persist. Addressing these gaps would enhance productivity, support firm growth, and unlock higher potential for entrepreneurship and innovation, including in the creative economy.

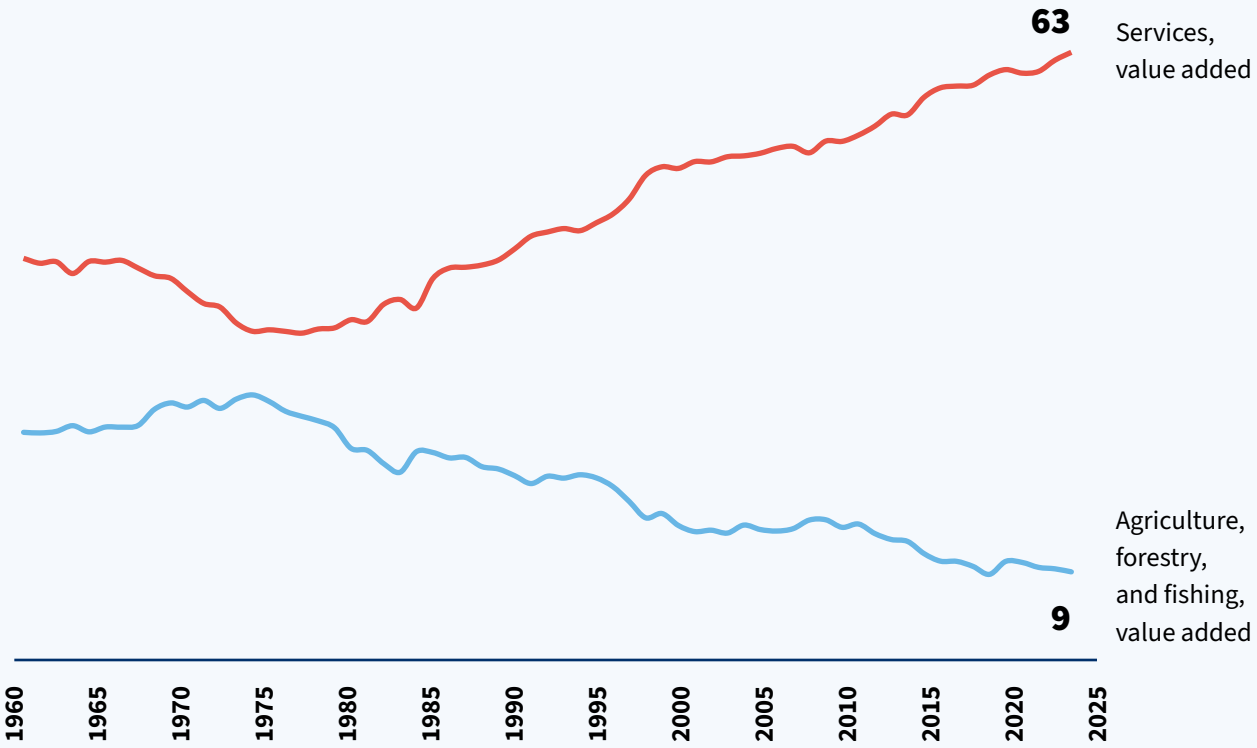
Balanced governance environment with structural constraints on innovation. Overall, the governance environment of the Philippines presents a mixed but generally stable picture for the creative ecosystem. While regulatory frameworks for business formation are comparatively strong and inequality has declined, structural challenges remain. A long-term weakening of the rule of law constrains innovation potential and investor confidence.

Figure 9. **Business Ready Index, World Bank, 2024. Score (%).**



Box 1: Creative Industries within the Philippines' Development Strategy

Figure 10. **Value added (% of GDP), World Bank, 2025.**



The Philippines' development strategy since the 1970s has centered on structural transformation through industrial upgrading, export diversification, and the reallocation of labor from low-productivity agriculture toward higher-productivity sectors. Over time, the share of services in value added has increased steadily, while agriculture has declined (fig. 10) (World Bank, 2025c). This pattern reflects a gradual reorientation of the economy toward knowledge-intensive and service-based activities. From a development economics perspective, this restructuring aligns with comparative advantages and convergence dynamics. In a context characterized by surplus labor and uneven human capital formation, sectors with higher marginal productivity of labor, such as capital services, offer stronger growth multipliers than agriculture. Moreover, the income elasticity of global demand for services, particularly knowledge-intensive services, exceeds that of many traditional goods sectors. As global incomes rise, demand for capital services including creative services expands disproportionately, reinforcing specialization in these activities.

The creative industries constitute a significant and dynamic subset of the capital services sector. Creative industries have grown at rates comparable to or exceeding GDP per capita growth in recent years, suggesting their role as a leading subsector in accelerating structural upgrading and learning effects within the economy.

2.3.
Social & Cultural Environment

Social and cultural foundations of creativity and innovation. This section assesses the components of the social and cultural environment that provide the creative ecosystem with cultural legitimacy, shared reference systems, and participatory expectations. These soft institutions shape inclusivity, influence sustainably the patterns of demand, and foster tolerance for experimentation. For creators and creative enterprises, it is important to operate in a society in which creativity and innovation are appreciated. Additionally, a strong foundation of social cohesion allows for an environment of plurality of perspectives, the basis of artistic expression.

While several indicators suggest untapped potential, ongoing improvements in inclusion and social development provide encouraging conditions for future growth. The social and cultural environment in the Philippines, measured through IP awareness, social cohesion, and cultural capital, reveals both important foundations and significant opportunities for further strengthening the country's creative ecosystem (fig. 11).

Opportunities to further strengthen creative thinking and imagination. Around 10% of respondents identify imagination as an important value to instill in children (Haerpfer et al., 2022), suggesting space to further promote creativity, experimentation, and innovative thinking within educational and social environments.

A cautious but evolving entrepreneurial culture. Findings from the Bangko Sentral ng Pilipinas (BSP, 2022) show that many business owners remain careful regarding borrowing and long-term financial commitments, particularly when managing larger loans. This highlights the importance of continued efforts in financial education, business support mechanisms, and access to entrepreneurial guidance.

Potential to enhance entrepreneurship monitoring. The absence of recent Global Entrepreneurship Monitor data over the past decade limits the ability to comprehensively assess entrepreneurial perceptions and ecosystem dynamics, pointing to an opportunity for stronger evidence-based monitoring.

Figure 11. **Radar Chart on Social and Cultural Environment of the Creative Ecosystem, Own elaboration based on data from Composite Indicators Table, Social & Cultural.**

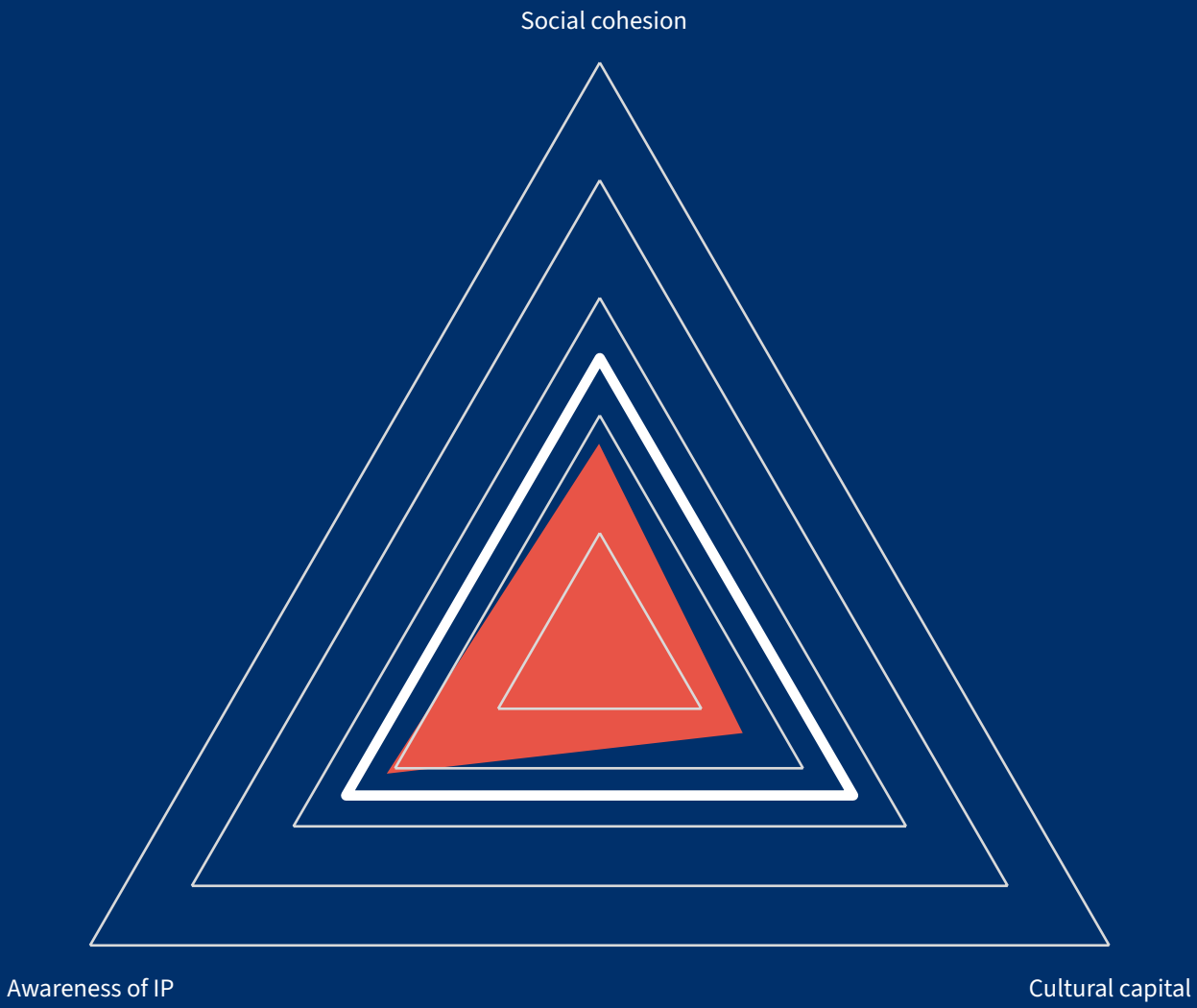
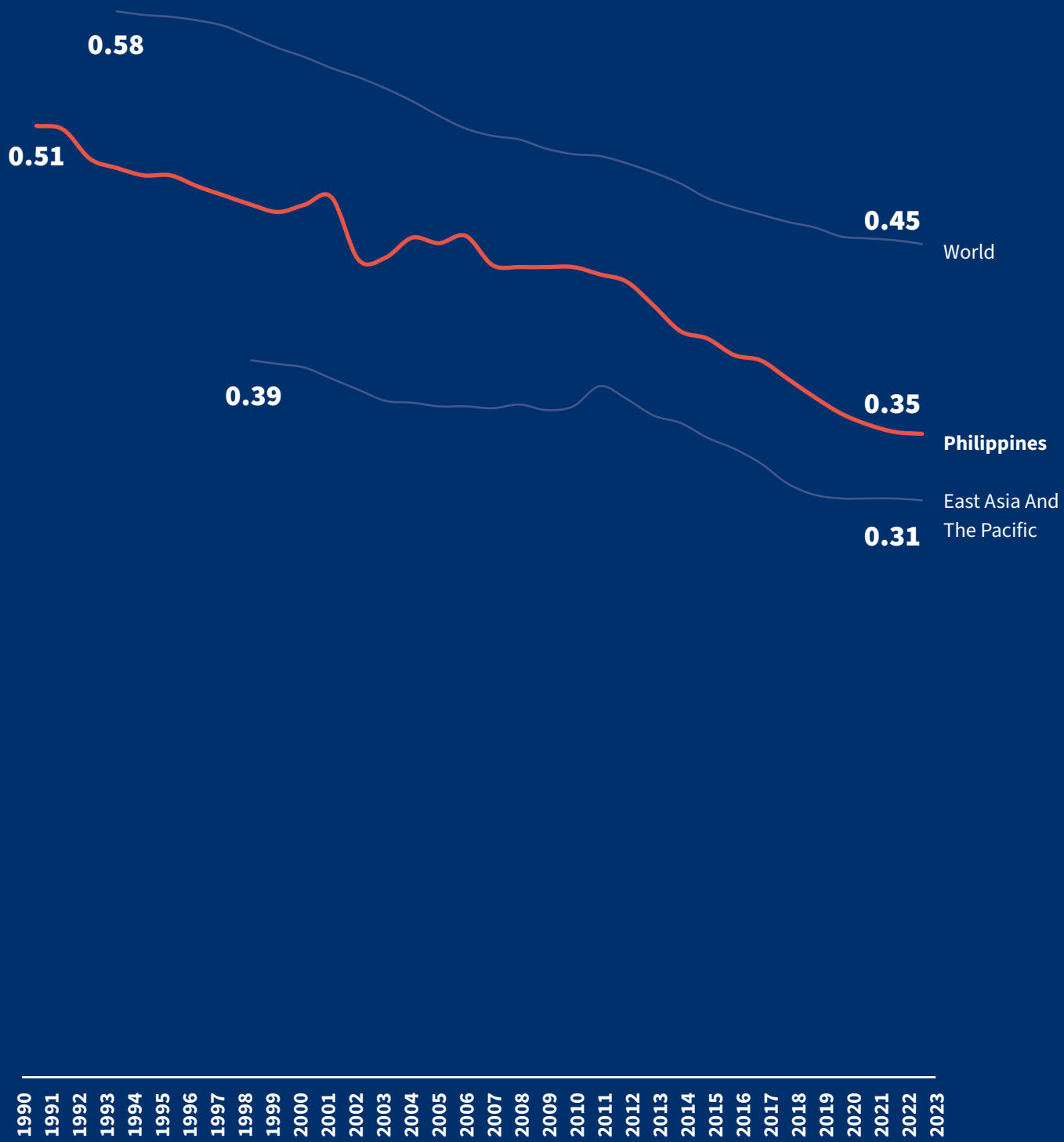


Figure 12. **Gender Inequality Index, UNDP Human Development Report Office, 2025. Index (0-1; 0= absolute equal)**



Encouraging progress in terms of social cohesion and inclusion. Gender inequality has steadily declined in recent years (fig. 12), reflecting positive advances not only from a social perspective, but also from an economic and developmental one (UNDP, 2025). More inclusive societies are generally better positioned to expand participation in education, employment, entrepreneurship, and cultural production, strengthening both social resilience and economic potential.

Low awareness of digital IP issues provides opportunities to strengthen public awareness of IP. In 2020, only 16% of the population reported awareness of intellectual property issues related to digital goods, highlighting opportunities for greater public education and outreach. Expanding awareness of intellectual property rights can support greater respect for creative work, improve monetization opportunities, and reinforce the long-term sustainability of the creative ecosystem (IPOPHL, 2021).

The social and cultural environment of the Philippines provides important foundations for the creative ecosystem but remains underutilized in key areas. While social cohesion is improving particularly with declining gender inequality, other indicators related to imagination, risk-taking, and entrepreneurial mindset suggest limited cultural support for experimentation and innovation. Addressing this is important in the long term, as appreciation and exposure to creativity can shape future demand for creative consumption. To better capture trends in entrepreneurial perception, it is also beneficial to resume participation in the Global Entrepreneurship Monitor. Furthermore, low awareness of intellectual property rights continues to constrain value capture through a tolerance towards piracy and weakening investment incentives within the creative sector.

3.
Resources for Creativity

Resources of the creative ecosystem comprise the key inputs that enable creative production and innovation in a systemic manner. After discussing the environment of the creative ecosystem focusing on the IP framework, the governance environment, and social and cultural values, the analysis now turns to the resource dimension. These include conditions for creators in a broad sense, infrastructure, access to finance, and the mechanisms that generate and sustain market demand. Together, they form the foundation for transforming ideas and talent into creative expression, innovation, and productivity. Together, they represent the key policy levers through which the creative ecosystem can be strengthened in the short and medium term to unlock its full potential and strengthen overall creative output.

3.1. Knowledge, Talent, and Skills

Knowledge, talent, and skills drive sustained creativity by equipping individuals and institutions with adaptive capacities. They enable learning, experimentation, and innovation through effective knowledge flows and the infrastructure required to generate complex creative outputs. Skilled, mobile, and well-supported talent transforms ideas into economic and cultural value, broadens participation, enhances productivity, and ultimately drives structural change, making the creative economy more competitive.

The radar chart (fig. 13) highlights the knowledge, talent, and skills dimension as a critical area for further strengthening within the Philippine creative ecosystem. While the country benefits from strong foundational capabilities, particularly in digital skills, several indicators suggest opportunities to further enhance higher-level creative capacities, innovation potential, and knowledge development.

Growing alignment between education and market demand. Graduates in Social Sciences, Journalism, and Information represented 4-5% of total graduates between 2015 and 2021, before increasing to more than 10% in 2023, reflecting the expansion of digital creative services and multimedia-related industries (UNESCO Institute for Statistics, 2025b). Institutional efforts in entertainment and multimedia computing have contributed to the development of skilled labor for sectors such as animation, digital content production, game development, and business process outsourcing.

Opportunities to strengthen advanced creative capabilities. Stakeholder consultations indicate remaining gaps in training in monetization strategies, business development, advanced storytelling, and original content creation.

Limited participation in Arts and Humanities education, but accessible creative labor market. Arts and Humanities graduates consistently accounted for less than 2% of total tertiary graduates throughout the assessed period between 2014 and 2023 (UNESCO Institute for Statistics, 2025a), suggesting scope to further strengthen advanced creative specialization. Programs such as the Expanded Tertiary Education Equivalency and Accreditation Program (ETEEAP) demonstrate ongoing efforts to broaden access to alternative educational pathways, including arts and music education. However, creative employment represents more than 17% of total employment in 2025, indicating that the sector remains relatively accessible to workers from diverse educational backgrounds (PSA, 2026e).

Figure 13. **Radar Chart on Knowledge, Talent and Skills of the Creative Ecosystem, Own elaboration based on data from Composite Indicators, Knowledge, Talent & Skills.**

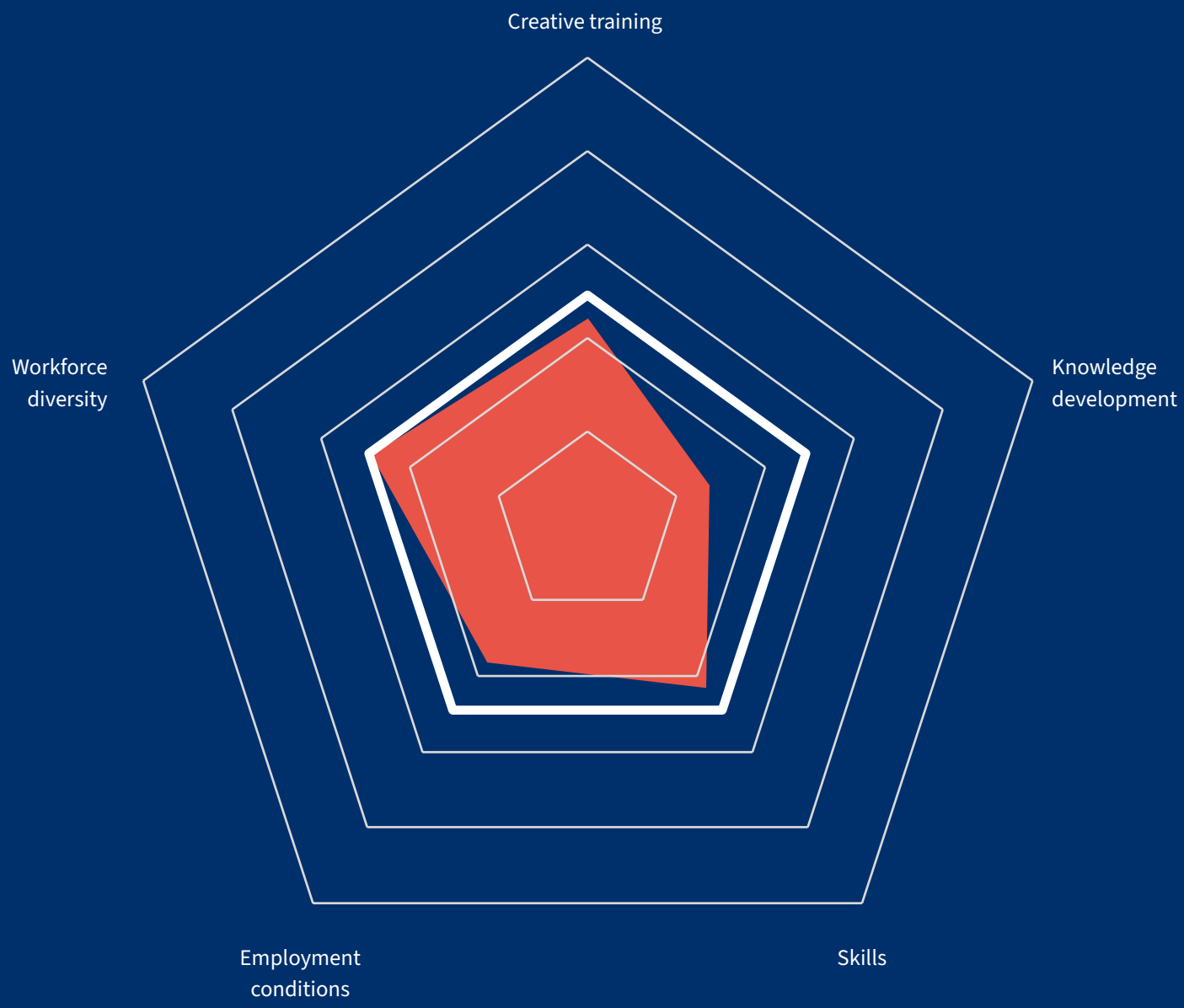


Figure 14. **Distribution of Creative Labor by Education Level 2023, ILO, Labour Force Survey (LFS), 2025.**

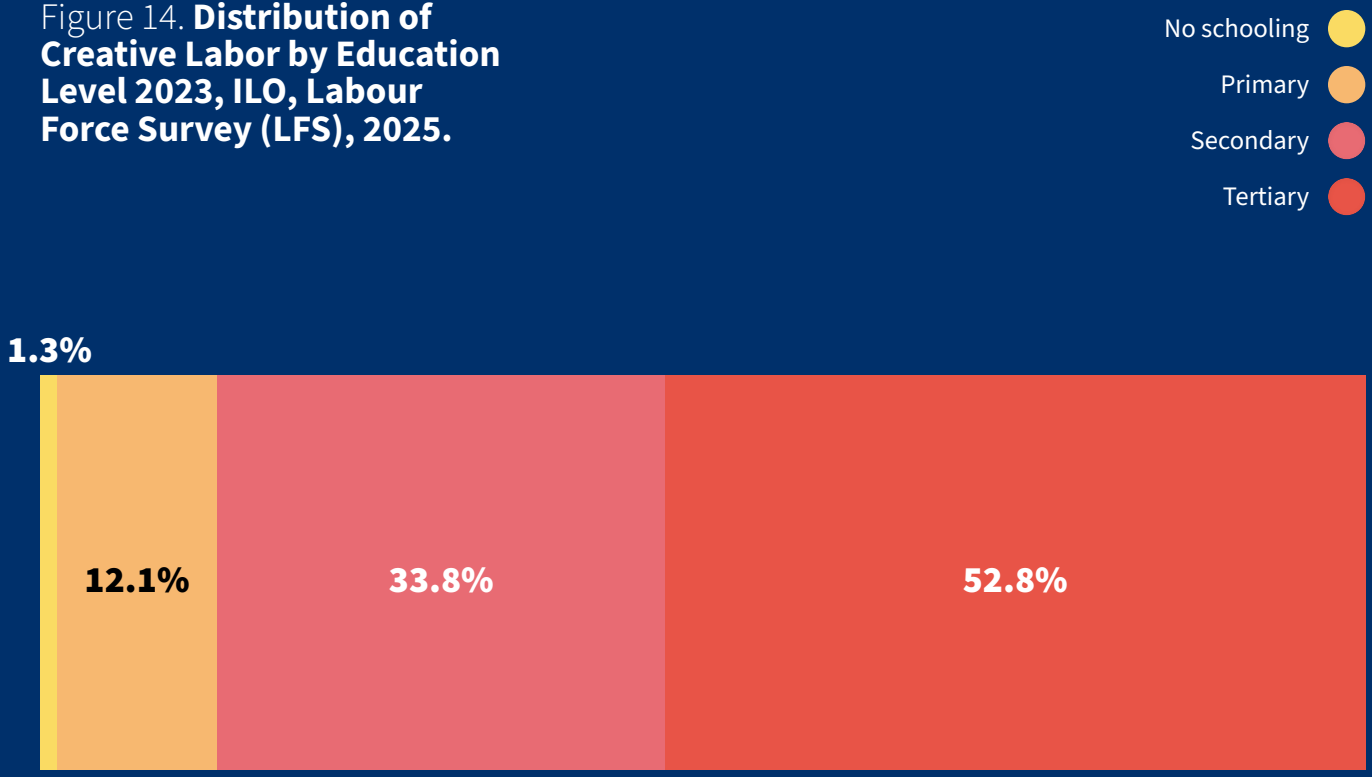
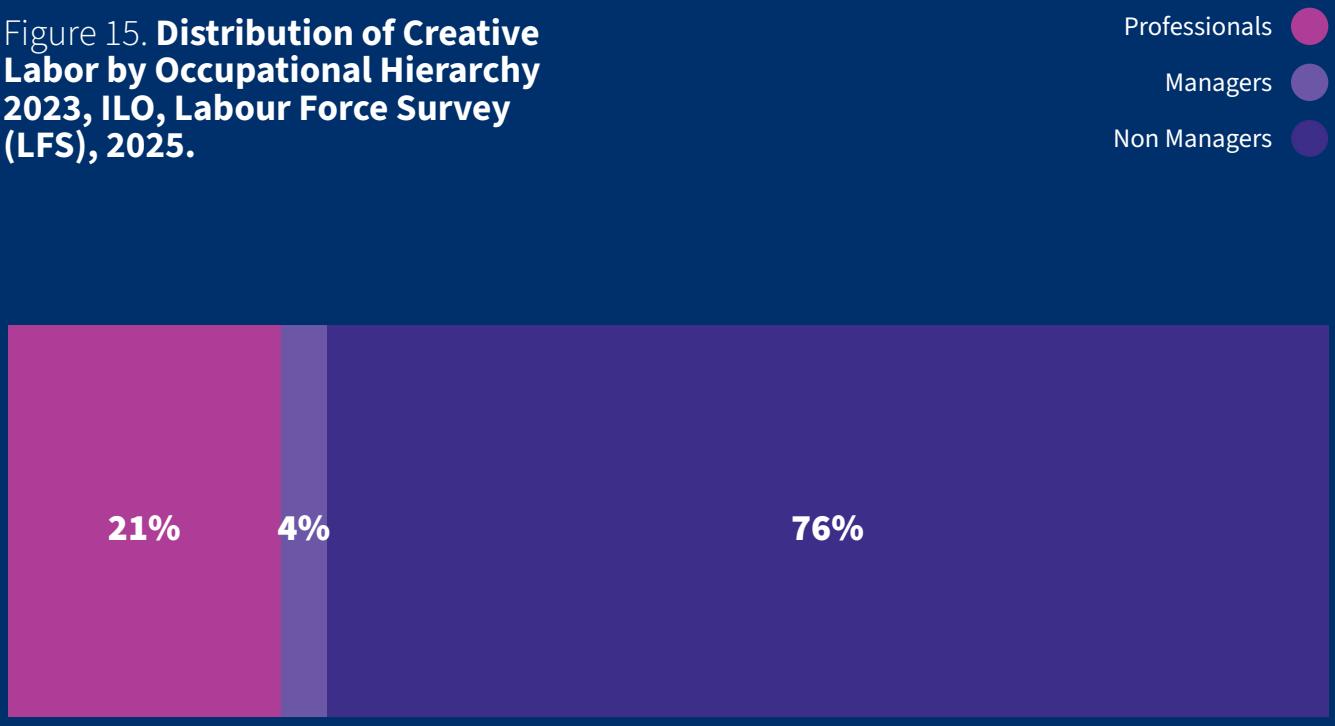


Figure 15. **Distribution of Creative Labor by Occupational Hierarchy 2023, ILO, Labour Force Survey (LFS), 2025.**

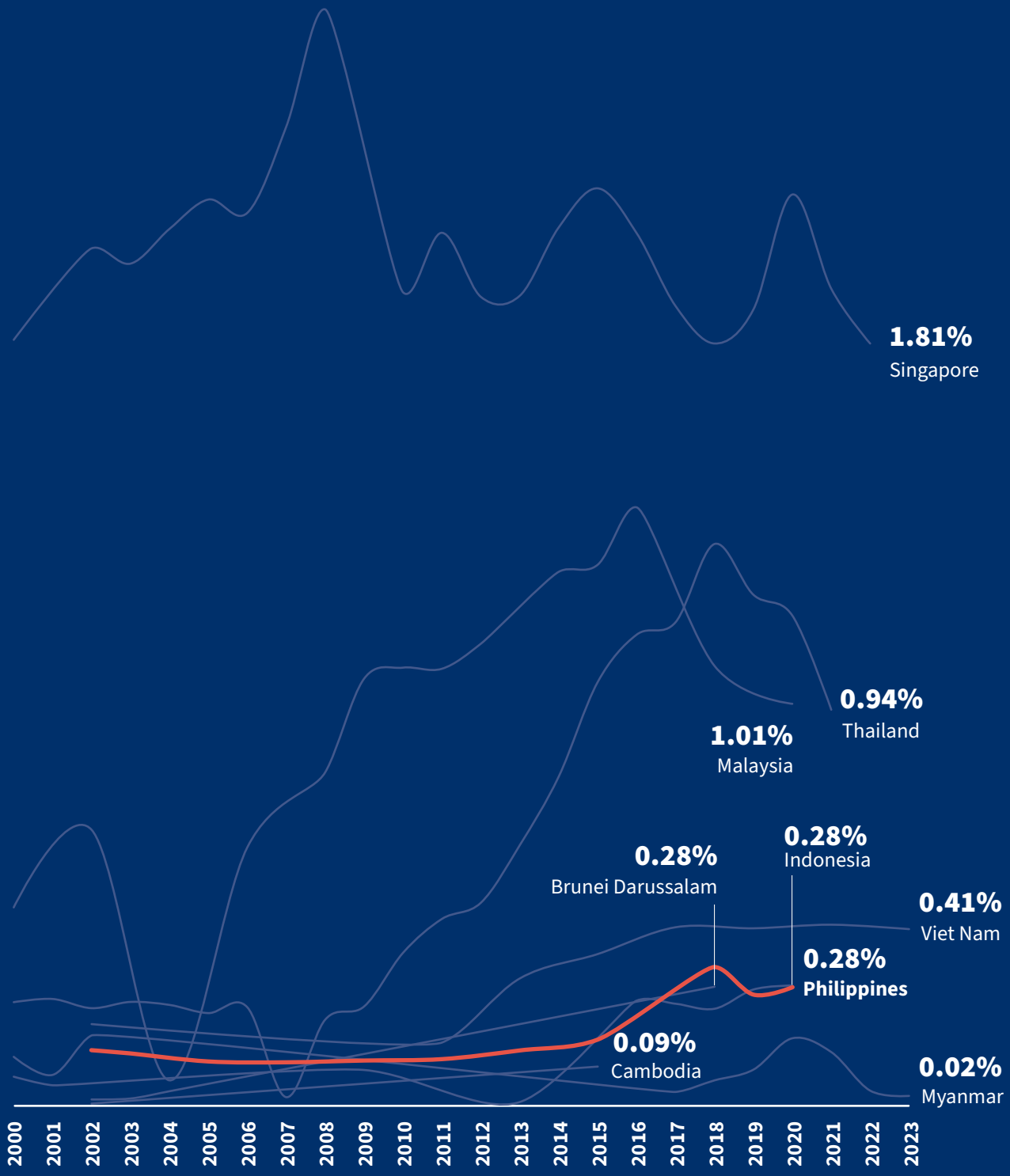


Potential mismatch between skills supply and demand, with underutilization of talent. Labor force data from 2023 indicate that, despite relatively strong educational attainment (fig. 14), a considerable share of creative workers remain concentrated in lower-complexity or routine occupations (fig. 15) (ILO, 2025). The TESDA Workplace Skills and Satisfaction Survey covered selected creative domains, such as audiovisual media, design, and digital interactive media, and subsectors such as animation, film and video, digital creative content, game development, and software development. The survey found that 55% of employees meet job requirements but do not exceed expectations, while 41% possess the capacity to assume more complex roles, suggesting significant unveiled human capital (TESDA, 2024). Finally, the Philippines performs comparatively well in English proficiency (EF Education First, 2025) and ICT capabilities (ITU, 2025c), providing an important foundation for participation in global creative and digital markets.

Gradual strengthening of the innovation system and scope to broaden R&D support frameworks. Gross domestic expenditure on R&D increased from approximately 0.1% of GDP in the early 2000s to almost 0.3% by 2020, reflecting a steady improvement in national investment in knowledge development. Although investment trends are positive, overall expenditure levels continue to lag behind regional comparators (fig. 16) (UNESCO Institute for Statistics, 2025c). Consultations suggest opportunities to expand support beyond patent-oriented innovation toward applied and practice-based research, including audience engagement, content development, and creative market analysis.

The Philippines possesses important human capital and digital strengths that provide a solid foundation for the creative economy. Continued efforts to strengthen advanced creative skills, innovation capacity, and knowledge development could further support the transition toward a more original-content-driven and self-sustaining creative ecosystem. Expanding higher-skilled creative occupations will be important to better absorb talent and support the transition toward more sophisticated creative production and intellectual property generation.

Figure 16. **Gross Domestic Expenditure on R&D as Percentage of GDP in selected ASEAN, UNESCO, Institute for Statistics (UIS), 2026.**



3.2.
Infrastructure

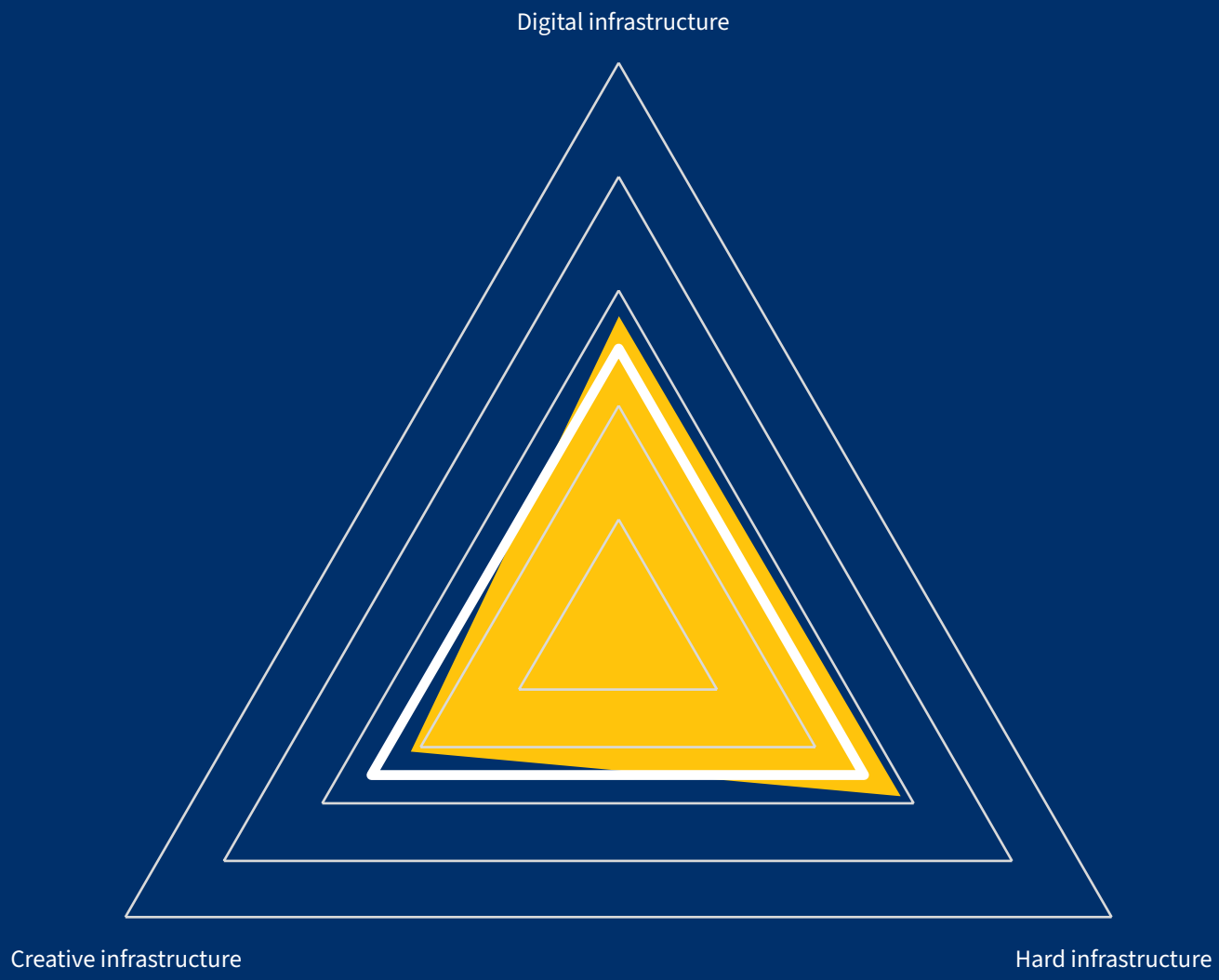
Infrastructure provides the operational backbone of the creative economy. Enabling production and distribution of creative goods and services as well as collaboration among actors within the ecosystem. It supports spatial clustering, facilitates network formation, and connects creators to audiences and markets. This element assesses hard infrastructure, digital infrastructure, and creative infrastructure, consisting of physical institutions that nurture talent, preserve culture, and stimulate participation in the creative ecosystem.

While broadband availability and creative infrastructure rank around the global average, hard infrastructure, which measures the performance of networks and services that support the physical mobility of goods within and across borders, performs relatively well. The assessment of infrastructure in the Philippines shows a balanced picture (fig. 17). Considering that the Philippines consists of numerous islands, a comparatively robust performance in this component represents a significant strength of the country.

Digital and creative infrastructure play a vital role in enabling participation, innovation, and market access across the ecosystem. Given the strong integration of the Philippine creative industries within the service economy and technology-intensive activities, the country points to a gradually strengthening infrastructure base, although important accessibility and affordability challenges remain.

Low Internet usage but expanding digital connectivity. In 2024, approximately 67% of the population uses the internet, compared to a global average of 74%, suggesting opportunities to further broaden digital inclusion. Population coverage with LTE and 5G networks is relatively high by international standards and continues to expand, reflecting ongoing investments in digital infrastructure (ITU, 2026). Fixed broadband download speeds have reached 94.40 Mbps, with upload speeds at comparable levels, reflecting steady improvements in network quality. Despite progress, broadband speeds remain below several regional peers, including Singapore (284.93 Mbps), Thailand (231.01 Mbps), Vietnam (135.00 Mbps), and Malaysia (132.72 Mbps) (Ookla, 2024).

Figure 17. **Radar Chart on Infrastructure of the Creative Ecosystem, Own elaboration based on data from Composite Indicators Table, Infrastructure.**



Affordability remains an important constraint. The annual cost of fixed broadband in 2024 represents approximately 11% of per capita GNI, around twice the ASEAN average, limiting accessibility for lower-income households (ibid).

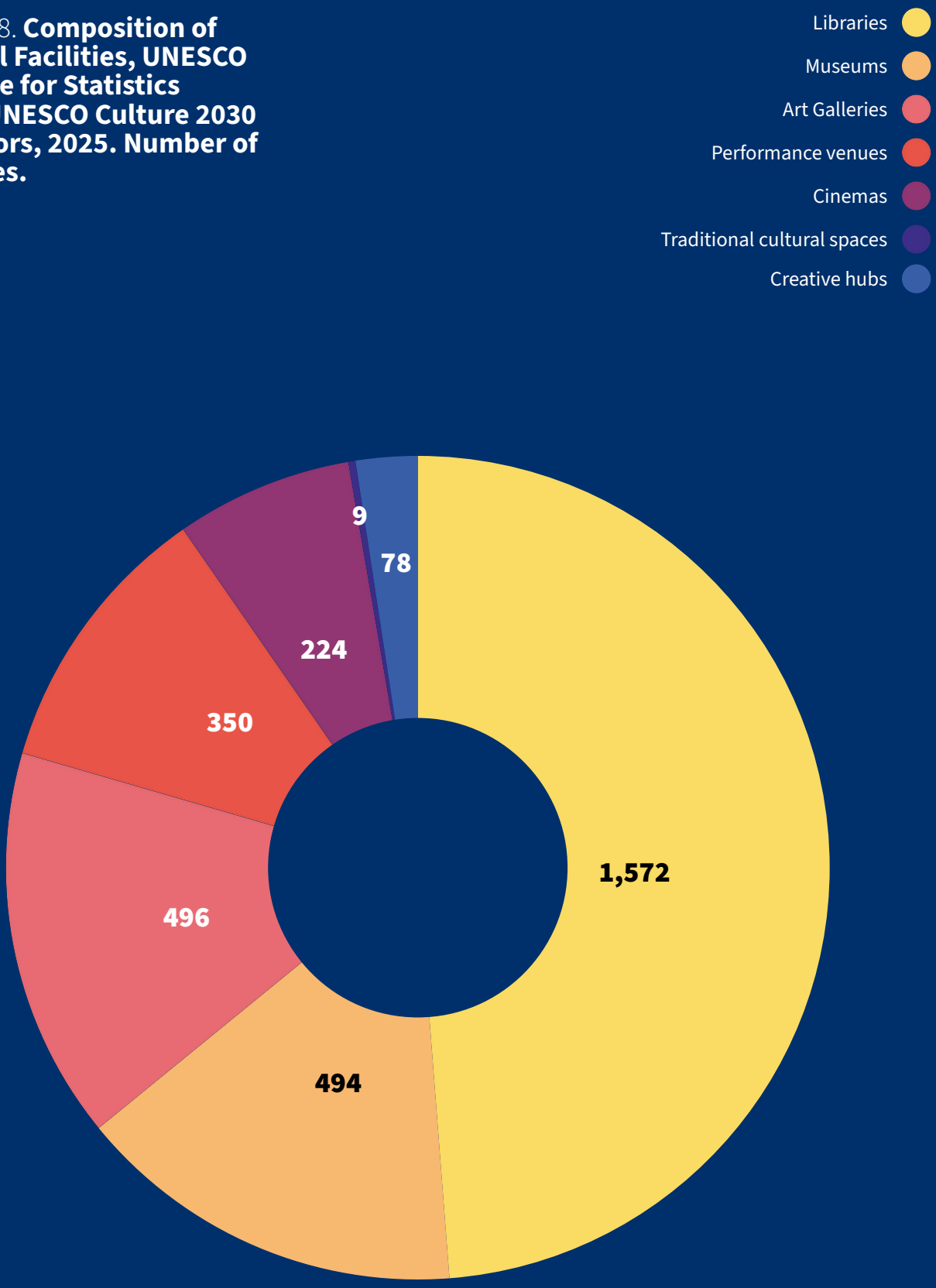
Positive regulatory reforms. The Konektadong Pinoy Act of 2025 aims to strengthen competition, lower barriers to investment, and reduce internet costs, supporting the transition toward more accessible fiber-based infrastructure services (Republic Act No. 12234, 2025; Business World Online). Improvements in connectivity and digital infrastructure are enhancing opportunities for Filipino creative workers and firms to engage in international creative and digital markets.

Creative infrastructure supports ecosystem development. Despite the expansion of digital platforms, physical venues continue to generate demand through collective cultural experiences and community engagement. Museums, libraries, performing arts venues, cultural centers, and creative hubs continue to play a critical role in connecting creators with audiences, preserving cultural heritage, and fostering cultural participation and innovation (fig. 18).

Need for stronger infrastructure mapping and monitoring. Current data limitations constrain a comprehensive assessment of the distribution, capacity, and outreach of creative facilities across regions. Future analysis would benefit from additional indicators such as visitor numbers, seating capacity, exhibition frequency, and regional accessibility to better understand the sector's absorptive capacity and territorial reach.

The Philippines has made important progress in strengthening both digital and creative infrastructure. Continued efforts to improve affordability, expand access, and strengthen cultural infrastructure systems could further support participation, innovation, and the long-term resilience of the creative ecosystem.

Figure 18. **Composition of Cultural Facilities, UNESCO Institute for Statistics (UIS), UNESCO Culture 2030 Indicators, 2025. Number of Facilities.**



3.3.
Finance

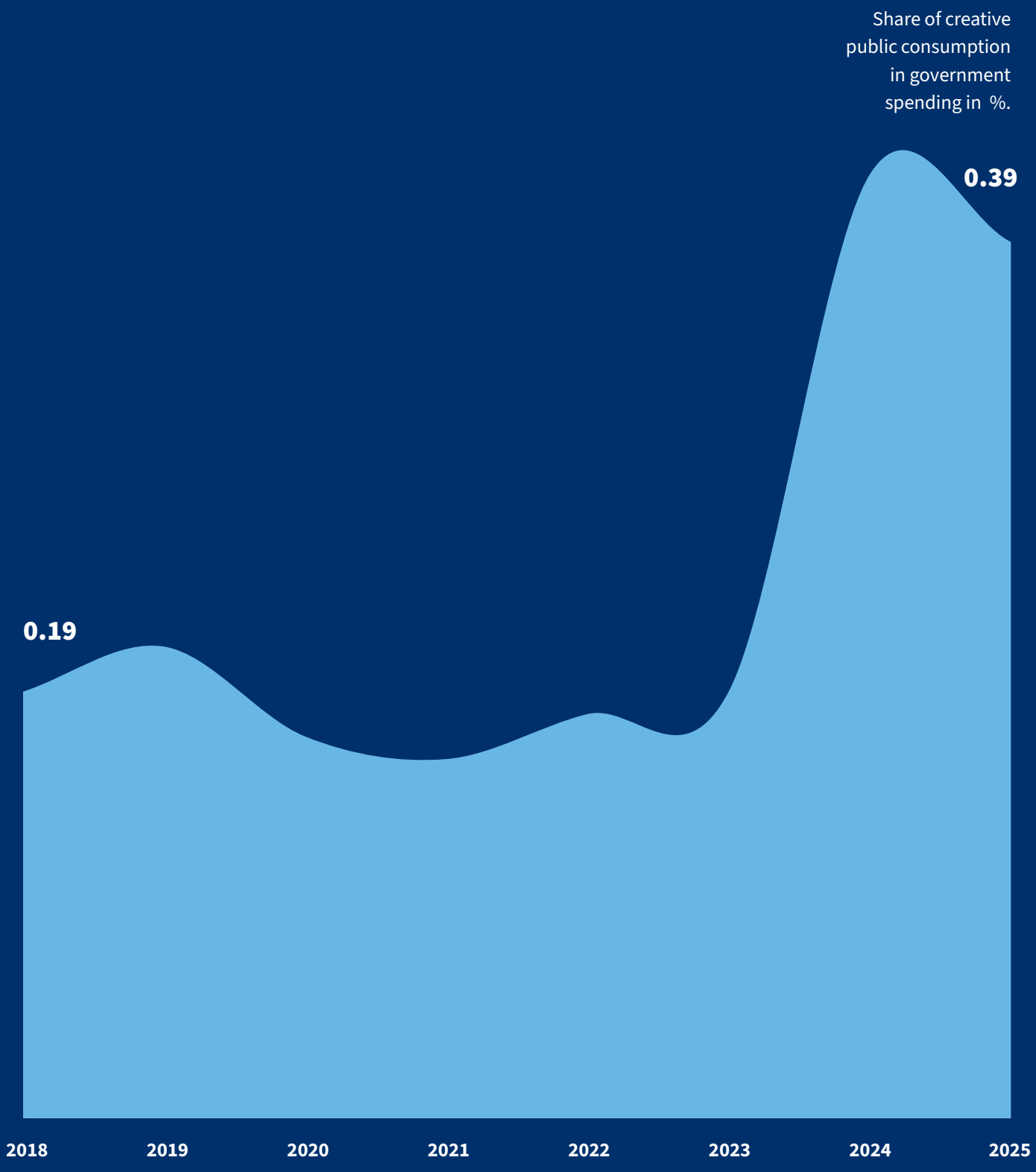
In the Philippines, recent trends point to growing institutional recognition of the sector, while also highlighting opportunities to further strengthen financing mechanisms for creative production and intellectual property generation. Finance plays a leading role in enabling experimentation, scaling creative ventures, and supporting long-term investment across the creative ecosystem.

Public investment in creativity is increasing, but overall levels of public spending remain moderate. Government expenditure on creative activities has shown a steady upward trend over time (fig. 19), reflecting growing recognition of the importance of culture and creativity within national development. In 2025, creative collective consumption represented approximately 0.4% of total government final consumption (PSA, 2026f), indicating scope for further expansion of public support mechanisms.

Limited data on private creative financing. The availability of structured information on venture capital, philanthropy, crowdfunding, and IP commercialization remains limited, constraining a more comprehensive assessment of private financial support for the sector.

Upfront financing, monetization, and commercialization remain as major challenges. Stakeholder consultations indicate that the high costs and risks associated with early-stage financing and ongoing difficulties in scaling and monetizing creative outputs continue to limit the development of domestically owned creative content and intellectual property. For that reason, the Philippines has remain a strong provider of creative and digital services for foreign-owned companies, particularly in outsourcing-related activities.

Figure 19. **Creative Collective Consumption, PSA, Philippine Creative Economy Satellite Account, 2026.**

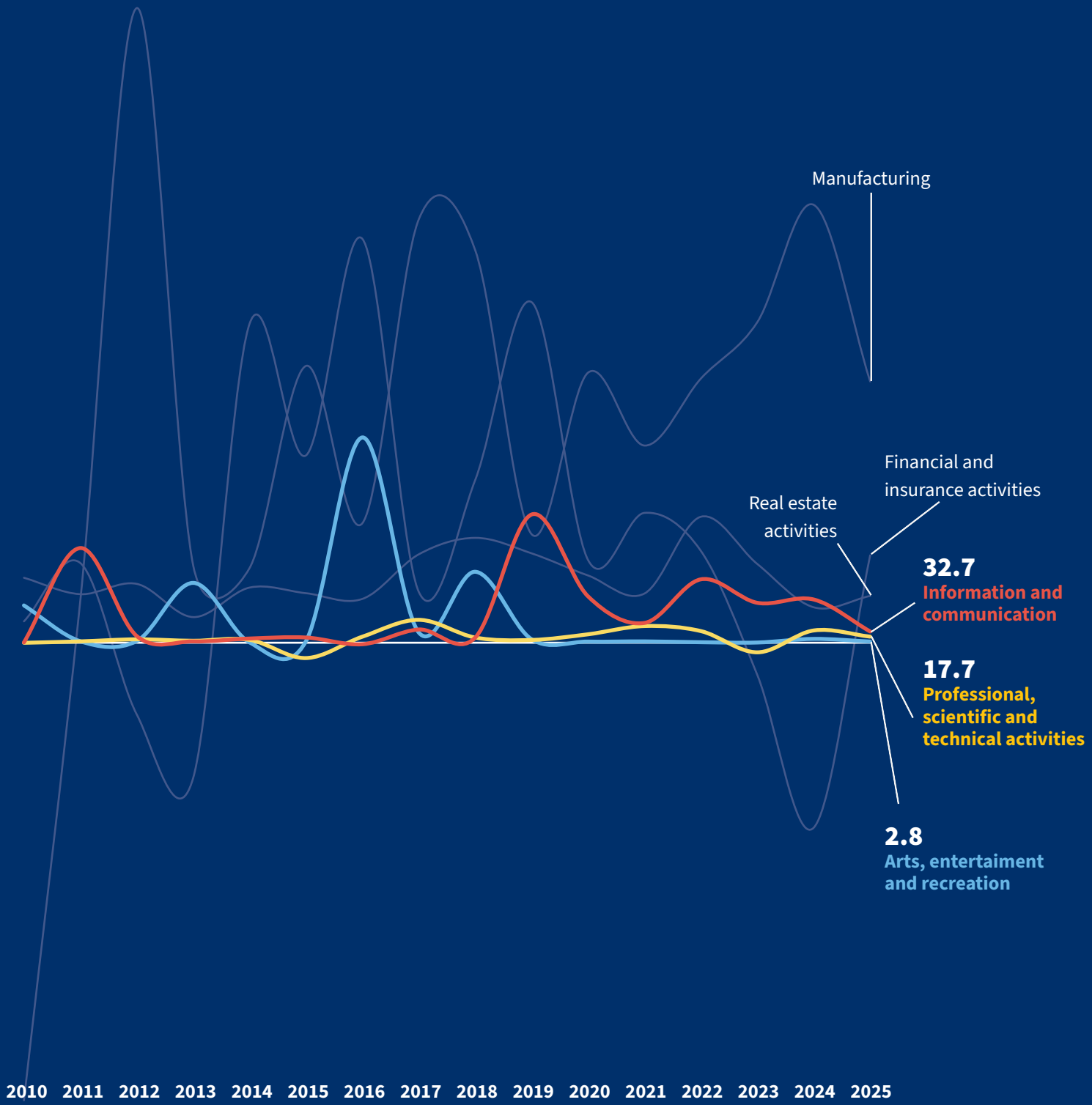


Limited recognition of IP as collateral, but positive progress in IP financing frameworks. Intellectual property assets are rarely accepted by traditional financial institutions as collateral, restricting access to finance for creative firms and creators. The Personal Property Security Act (PPSA) (Republic Act No. 11057) institutionalizes the use of intellectual property as security for financing and loans. IPOPHL's initiatives on IP valuation and commercialization represent important steps toward strengthening the recognition of intangible assets within financial systems (IPOPHL, 2024). The Philippine Intellectual Property Strategy (PHIPS 2025–2030) aims to institutionalize IP-backed financing by enabling IP assets to serve as loan collateral. Despite this legal framework, IP assets are still rarely accepted by financial institutions, and one of the major challenges affecting the full implementation of such mechanisms is the difficulty of IP valuation. Another significant constraint is the lack of a secondary market for IP assets, which limits liquidity and reduces lender confidence in IP-backed transactions. Expanding the valuation and financial recognition of intangible assets could improve access to finance and support a transition toward more innovation-driven and IP-oriented creative industries.

Growing international attractiveness, but opportunities to strengthen creative-sector investment. Foreign direct investment (FDI) trends further illustrate the evolving position of the Philippine creative economy within international markets. Overall net FDI inflows have increased steadily since 1970, reflecting the country's growing attractiveness as an investment destination (BSP, 2026). However, FDI directed specifically toward creative industries has fluctuated and has shown a more consistent decline since around 2020 (fig. 20). While creative-sector FDI can be influenced by large one-off investments, sustained declines may suggest opportunities to further strengthen the international positioning and visibility of the country's creative economy. In this context, recent policy reforms and financing initiatives provide a positive foundation for attracting future investment and supporting the long-term sustainability of the sector. The Creative Industry Development Fund, introduced by the PCIDA, is expected to support R&D, trade promotion, human resource development, and the strengthening of creative workers' associations.

The Philippines has made important progress in strengthening institutional support for creative financing. Continued efforts to expand access to finance, improve IP commercialization mechanisms, and strengthen investor confidence could further support original content creation, innovation, and the development of a more self-sustaining creative ecosystem.

Figure 20. **FDI in Creative Industries and Related Industries vs. Non-Creative Industries, Bangko Sentral ng Pilipinas provided through DTI, 2026. Million USD.**



3.4.
Demand

The demand structure in the Philippines shows clear strengths but also areas that need attention. While household spending on creative goods and services is relatively low, digital consumption of creative services is comparatively high in global comparison (fig. 21). Demand generates incentives for innovation and shapes the structure of production. It sustains creative activity through responsive, diverse, and evolving forms of engagement.

High digital engagement with creative content, but low levels of online creative purchases. Internet use for creative purposes, including streaming music and audiovisual content, gaming, and downloading digital media, remains relatively high among the population (fig. 22) (ITU, 2025). Despite strong digital consumption, the share of individuals purchasing creative goods and services online remains comparatively low (fig. 23) (ITU, 2025a), suggesting untapped market potential for creative industries. The gap between high digital consumption and low online purchasing may indicate the widespread use of informal or non-commercial channels for accessing creative content.

Need to strengthen audience research and market intelligence. Consultations with sector stakeholders indicate that domestic demand for Filipino creative content remains relatively low. This issue could be understood from two complementary perspectives: on the one hand, there may be limited audience adaptation to new and diverse forms of local content; on the other, there may be an insufficient understanding of consumer preferences within the domestic market.

Importance of cultural exposure and early engagement. Expanding exposure to local creative content, particularly through education and cultural participation, may help strengthen long-term audience formation and appreciation for Filipino creative works.

Figure 21. **Radar Chart on Demand of the Creative Ecosystem, Own elaboration based on data from Composite Indicators Table, Demand.**

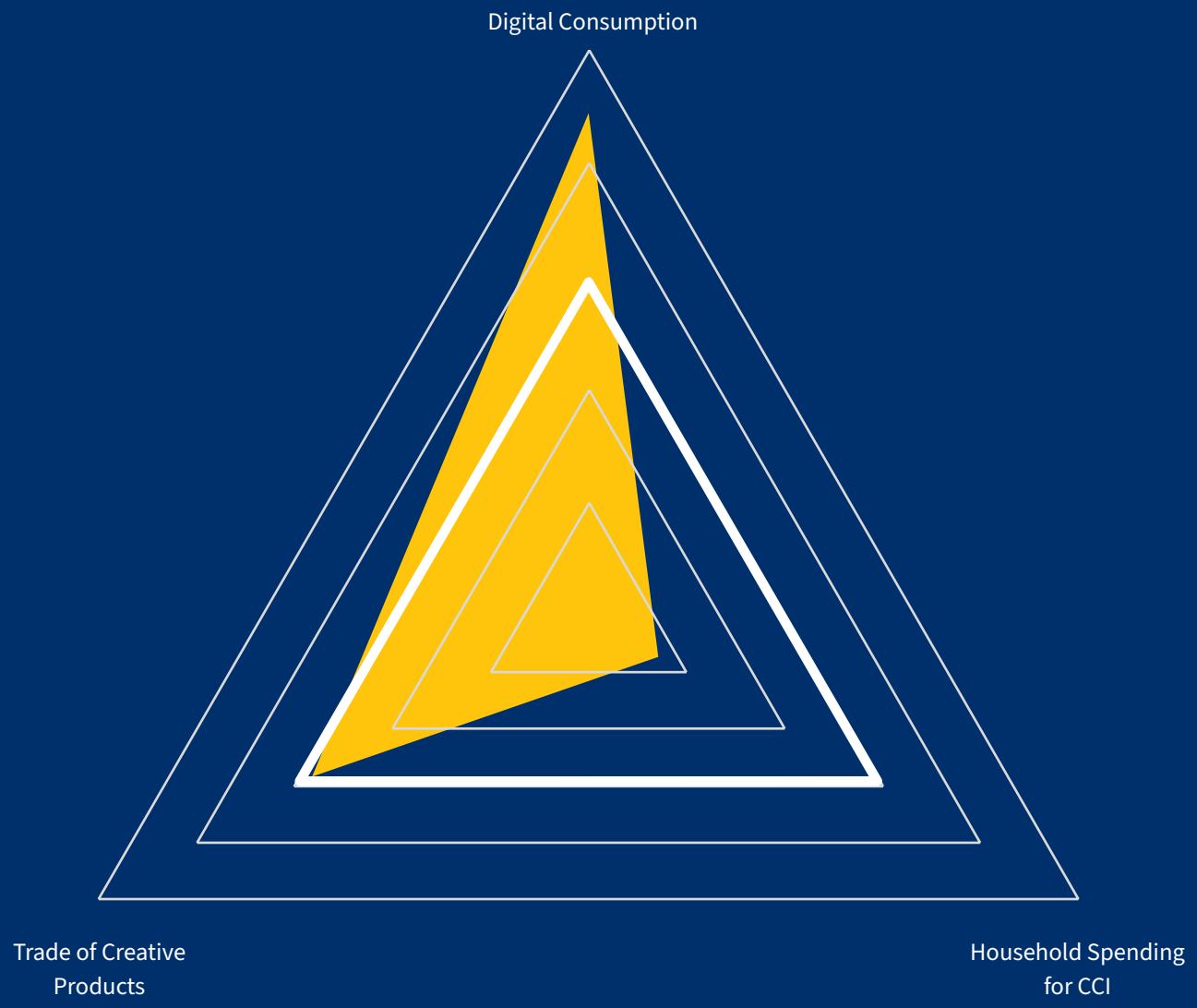


Figure 22. **Internet Activities in percentages, ITU, 2025.**

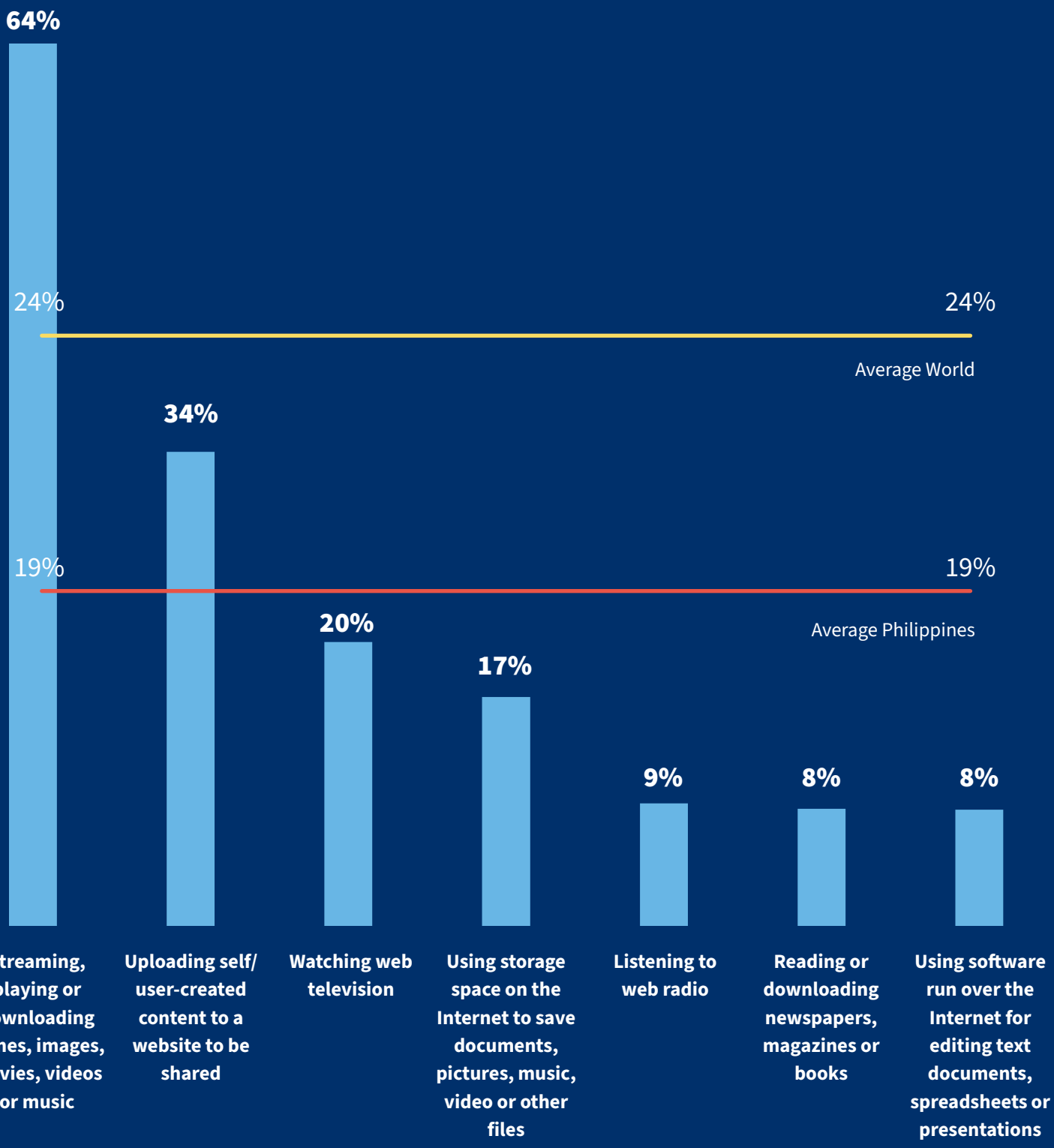
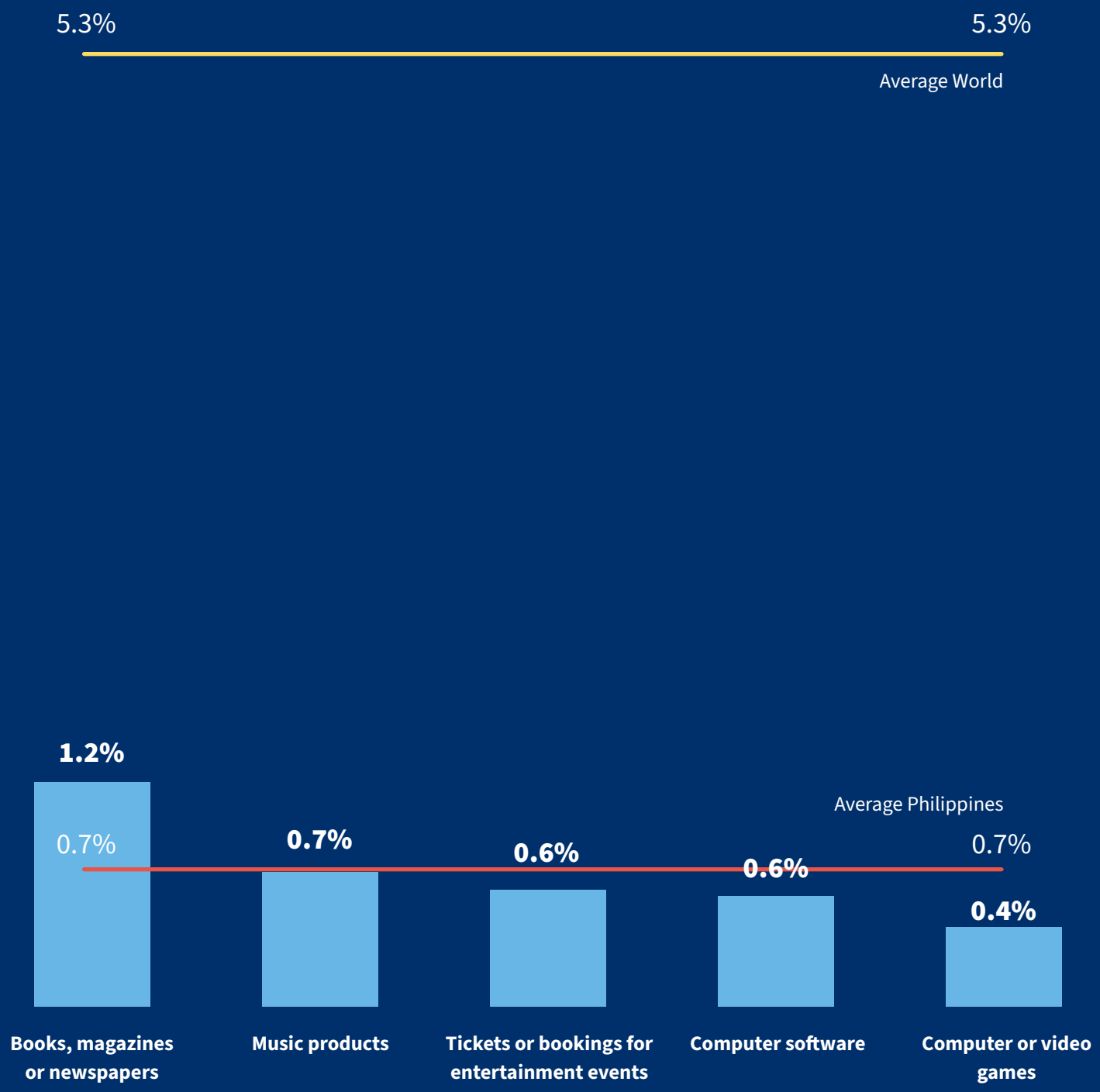


Figure 23. **Internet Purchases in percentages, ITU, 2025.**



Robust performance in creative services exports and trade deficit in creative goods persists. Creative services account for approximately 12% of total service exports, highlighting the growing importance of the sector within the country's external economy (fig. 24) (PSA, 2026g, 2026i), particularly in technology and computer-related services (see trade composition in the Annex), making creative services a core and relatively stable source of external demand. Cultural satellite account data indicate that the Philippines remains a net exporter of creative services (fig. 25), reflecting strong international demand in these areas. In contrast, the country continues to register a deficit in creative goods trade (fig. 26), suggesting more limited competitiveness in physical creative products (PSA, 2026h, 2026j).

Continued reliance on imported intellectual property with a gradual improvement in IP dependency trends. Payments for the use of IP exceed receipts from IP use, indicating that the Philippines remains a net importer of IP-related products (fig. 27) (World Bank, 2026a, 2026b). This mismatch suggests limited domestic capacity to generate, license, and commercialize IP assets, and points to a continued reliance on foreign content and technologies. At the same time, this dependency has shown signs of gradual reduction since 2019, as payments for the use of IP have declined.

Demand for creative goods and services in the Philippines presents a mixed but evolving picture. Domestic demand, as reflected in household spending, remains relatively modest, while digital consumption is high, indicating strong engagement but limited monetization. Internationally, the country performs well, with a sustained surplus in creative services. However, continued net imports of intellectual property highlight structural constraints in domestic IP creation and commercialization, which may limit the long-term development of the creative economy.

Figure 24. **Share of Creative Goods and Services in total trade, PSA, Philippine Creative Economy Satellite Account., 2026.**

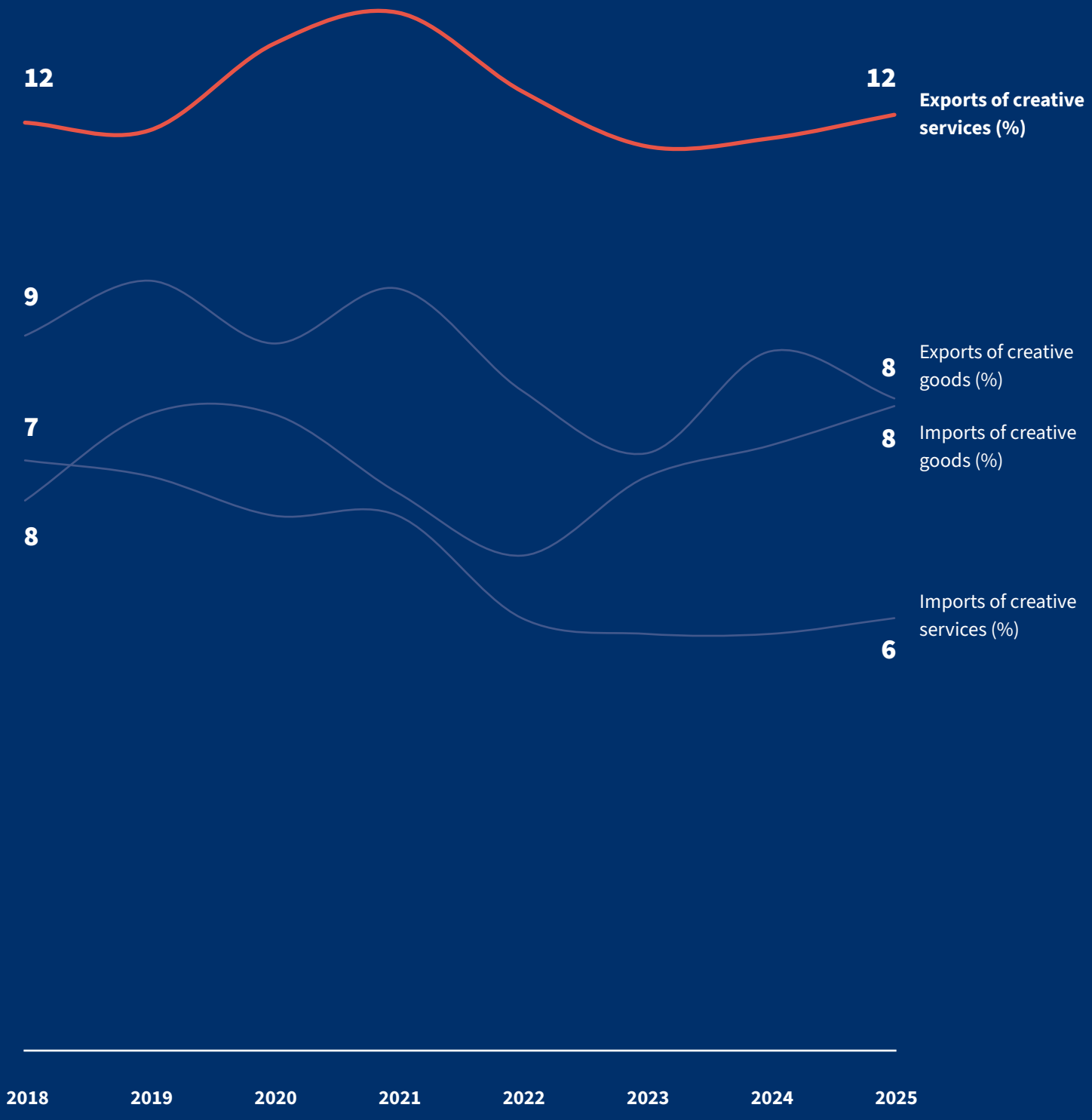


Figure 25. **Trade in creative services, PSA, Philippine Creative Economy Satellite Account, 2026.**

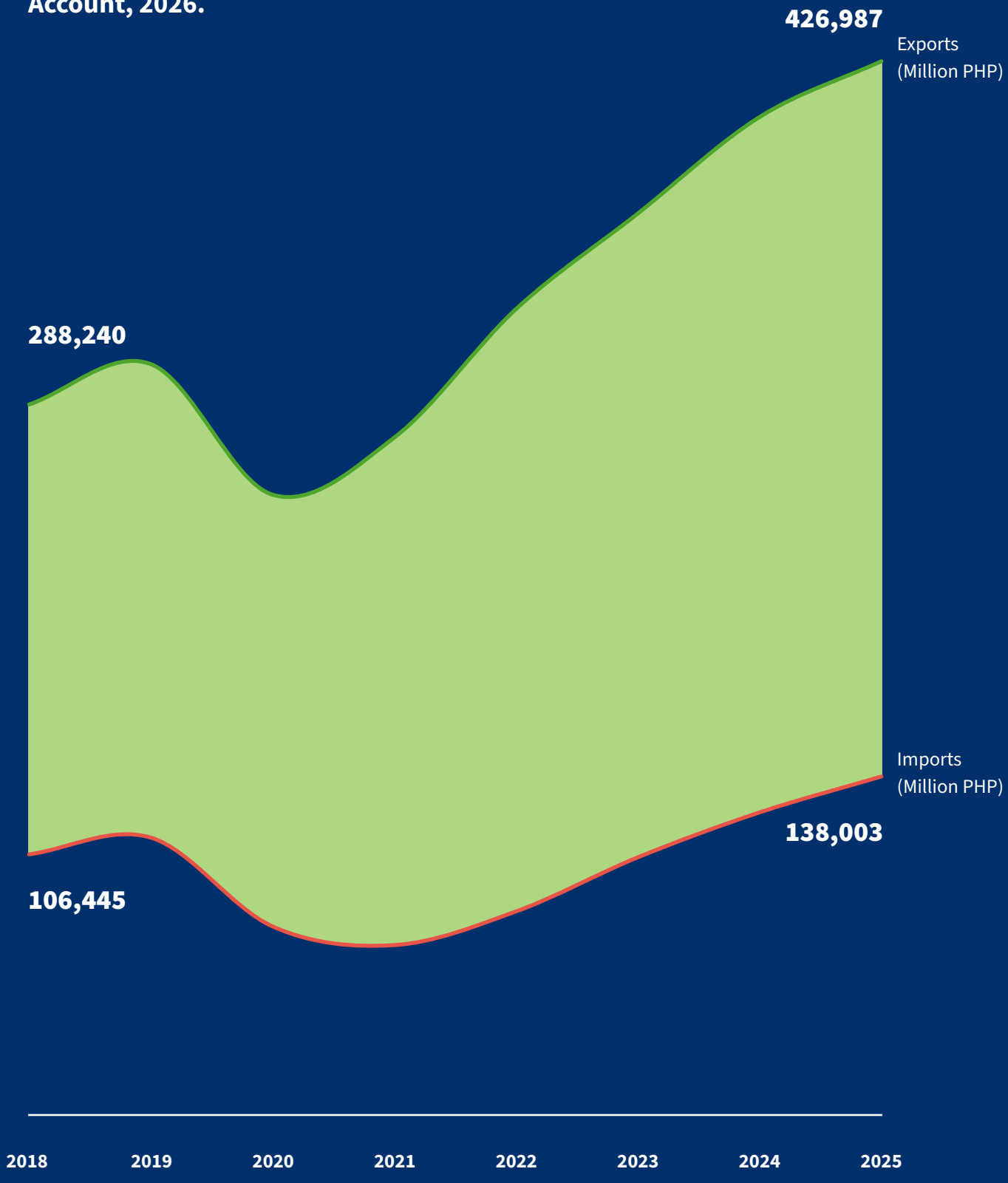


Figure 26. **Trade in creative goods, PSA, Philippine Creative Economy Satellite Account, 2026.**

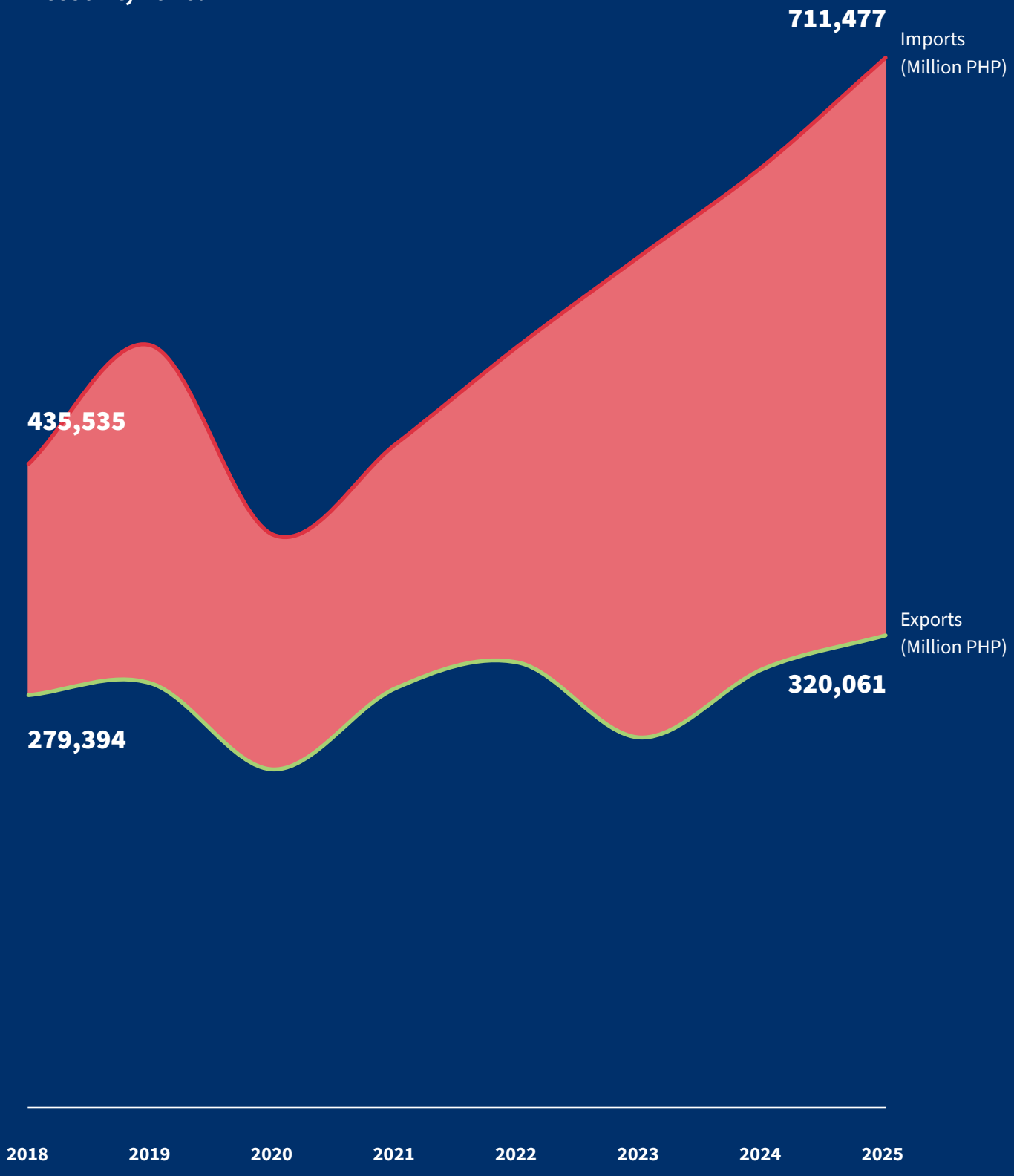
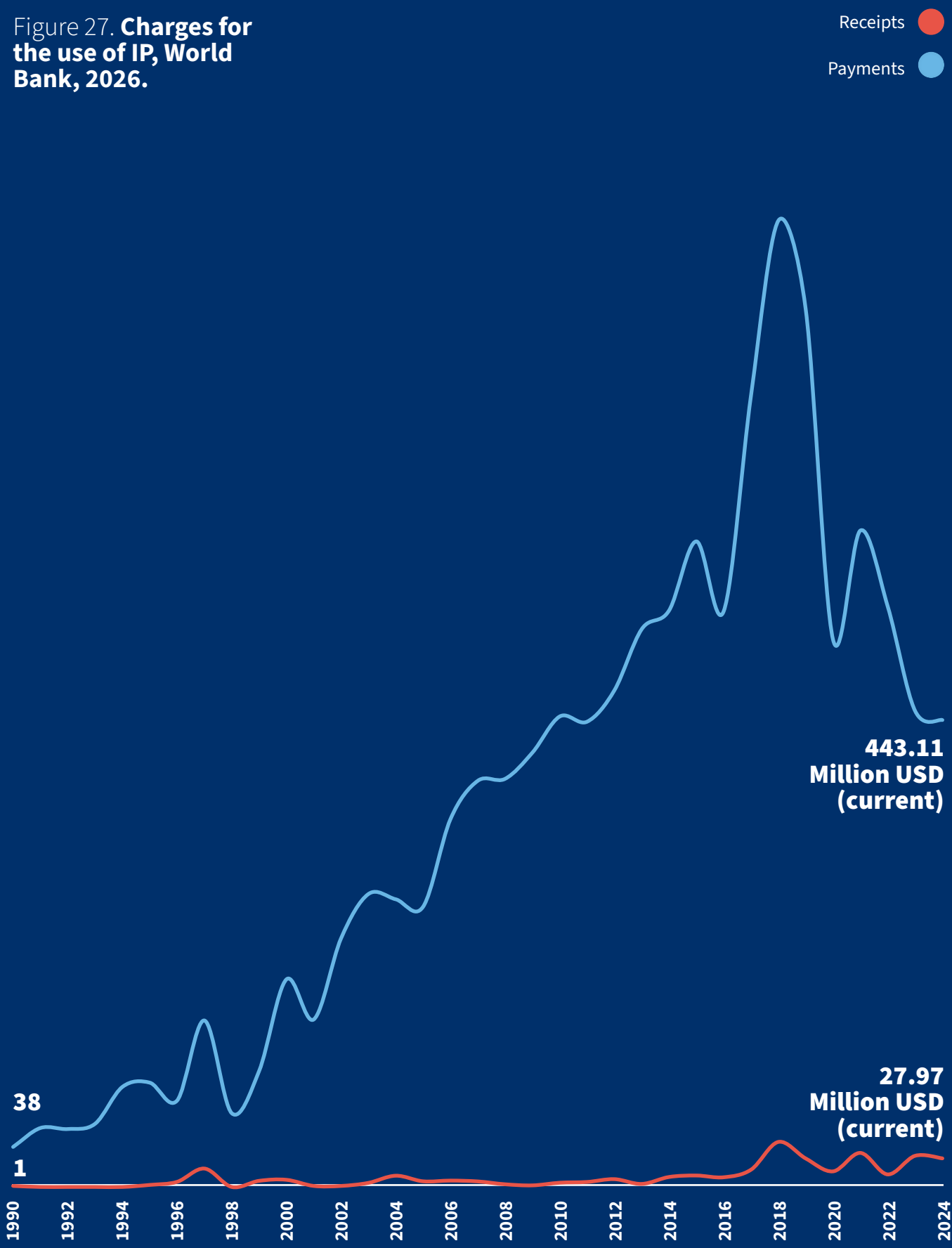


Figure 27. **Charges for the use of IP, World Bank, 2026.**

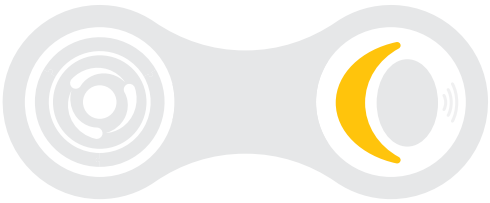


4.
Creative Value

Outputs in the creative ecosystem represent measurable results that emerge from the interaction between environmental conditions and resource inputs. They serve as key performance indicators for evaluating policy effectiveness and benchmarking ecosystem performance at the national level. The output of the creative ecosystem needs to be assessed from different perspectives to fully understand its performance, as the creative ecosystem generates not only economic value but also non-market impacts that are important to measure and acknowledge.

Creative value is assessed through two complementary components: innovation and economic contribution. A productive sector, one that uses capital efficiently to generate output, does not necessarily imply that it is also innovative or capable of producing novel products and processes. Accordingly, the innovative performance of the ecosystem is evaluated by examining its intellectual property outputs, while its economic contribution is assessed through traditional productivity indicators such as labor and value added.

4.1.
IP Generation



Intellectual property creation reflects both the innovation capacity and the formalization of creative activity. Due to the lack of comprehensive data on all types of commercialized creative works, this section relies on illustrative information from selected creative markets. Across these different IP categories, the Philippines shows signs of a growing creative market, yet partially ineffective commercialization infrastructure.

Growing creative production across publishing markets and strong recovery following the pandemic. Legal deposit data (fig. 28) indicate that publishing and literary output in the Philippines has expanded in both scale and diversity of formats. After a temporary contraction in 2020, legal deposits increased significantly again by 2022, supported in part by the growing presence of e-books and digital publishing formats (WIPO, 2023).

Rising copyright awareness and formalization. The increase in legal deposits and copyright registrations suggests both expanding creative production and improving awareness of copyright protection mechanisms.

Growing use of broader IP instruments and increasing diversification of IP assets. Trademark filings in the Philippines have increased steadily over time (fig. 29), suggesting use of IP in addition to copyright (IPOPHL, 2026c). The simultaneous growth in copyright registrations and trademark filings reflects the diversity of intangible assets generated within the creative industries. Despite positive trends in IP creation, stakeholder evidence suggests that mechanisms for monetization, licensing, and commercialization of creative outputs could be further reinforced.

The evidence points to a creative ecosystem that is gradually strengthening its capacity to generate and formalize intellectual property. Continued efforts to improve commercialization infrastructure, digital publishing systems, and IP monetization mechanisms could further support innovation, value capture, and the long-term sustainability of creative production in the Philippines.

Figure 28. **Legal Deposits by Formats, WIPO, 2023. Number of Registrations.**

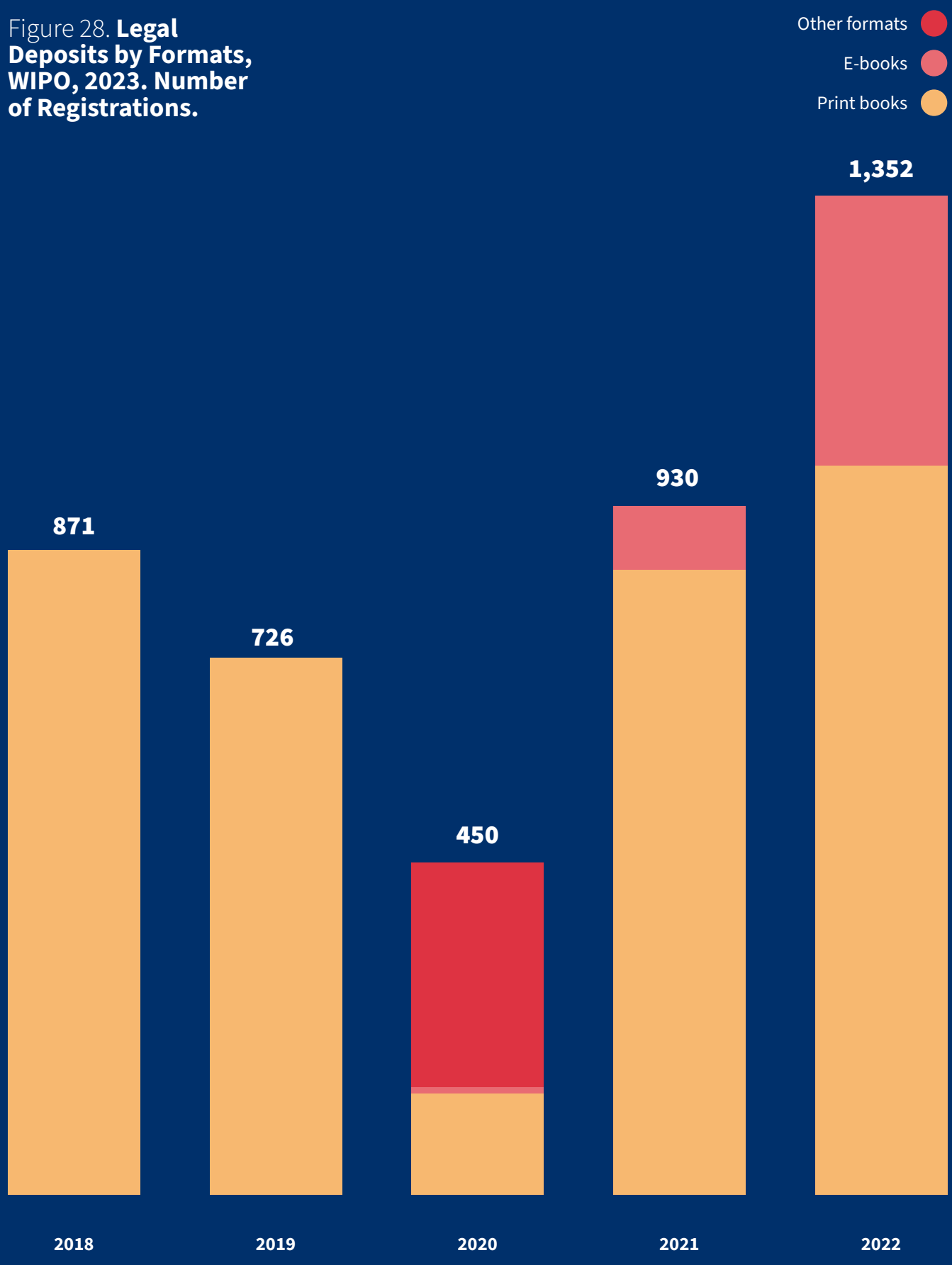
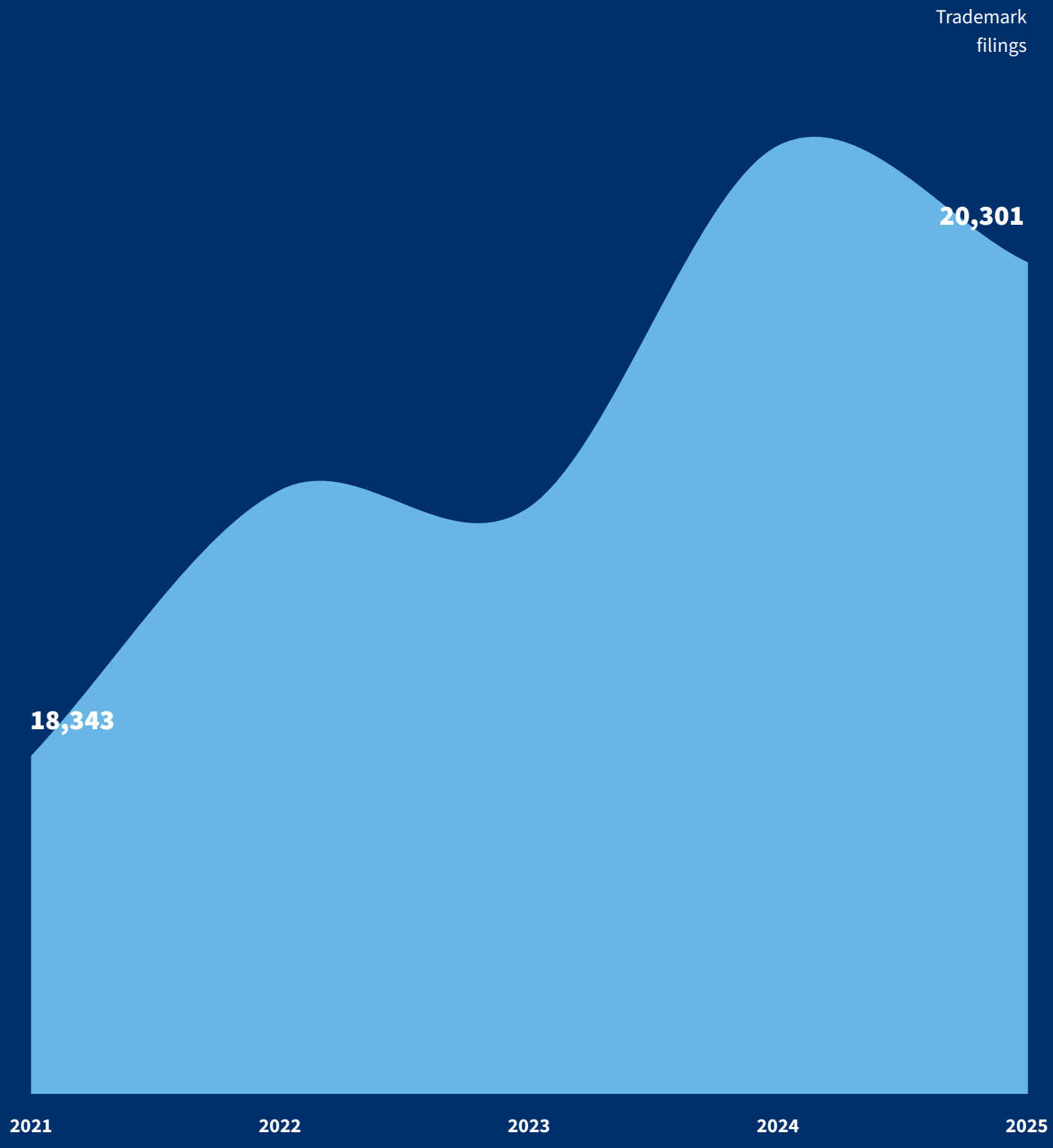


Figure 29.
Trademark Filings in Creative Sectors, IPOPHL, 2026.



4.2.
Socioeconomic Contribution

In the Philippines, recent trends point to a creative sector that is expanding steadily, demonstrating both resilience and growing economic relevance. Value added remains one of the most widely used indicators for assessing the performance of the creative ecosystem, as it captures the extent to which creative activities are transformed into economic output and employment.

Sustained growth in creative GDP contribution, especially from digital and symbolic activities. Since 2020, the share of the creative industries in GDP has grown consistently, with annual increases of 6%-8% (PSA, 2026a, 2026b). The largest shares of creative value added originate from symbols, images, and related activities, followed by digital interactive goods and services (fig. 30).

Growing importance of creative employment accounting 18% of the labor market, as traditional cultural expressions remain labor-intensive. Employment in the creative industries surpassed eight million workers in 2025, reinforcing the sector's role as a major source of jobs and economic activity. The largest employment shares are concentrated on traditional cultural expressions, followed by symbols, images and related activities, and advertising and R&D activities (fig. 31) (PSA, 2026d).

Figure 30. **Value Added by Creative Sector, PSA, Philippine Creative Economy Satellite Account, 2026.**

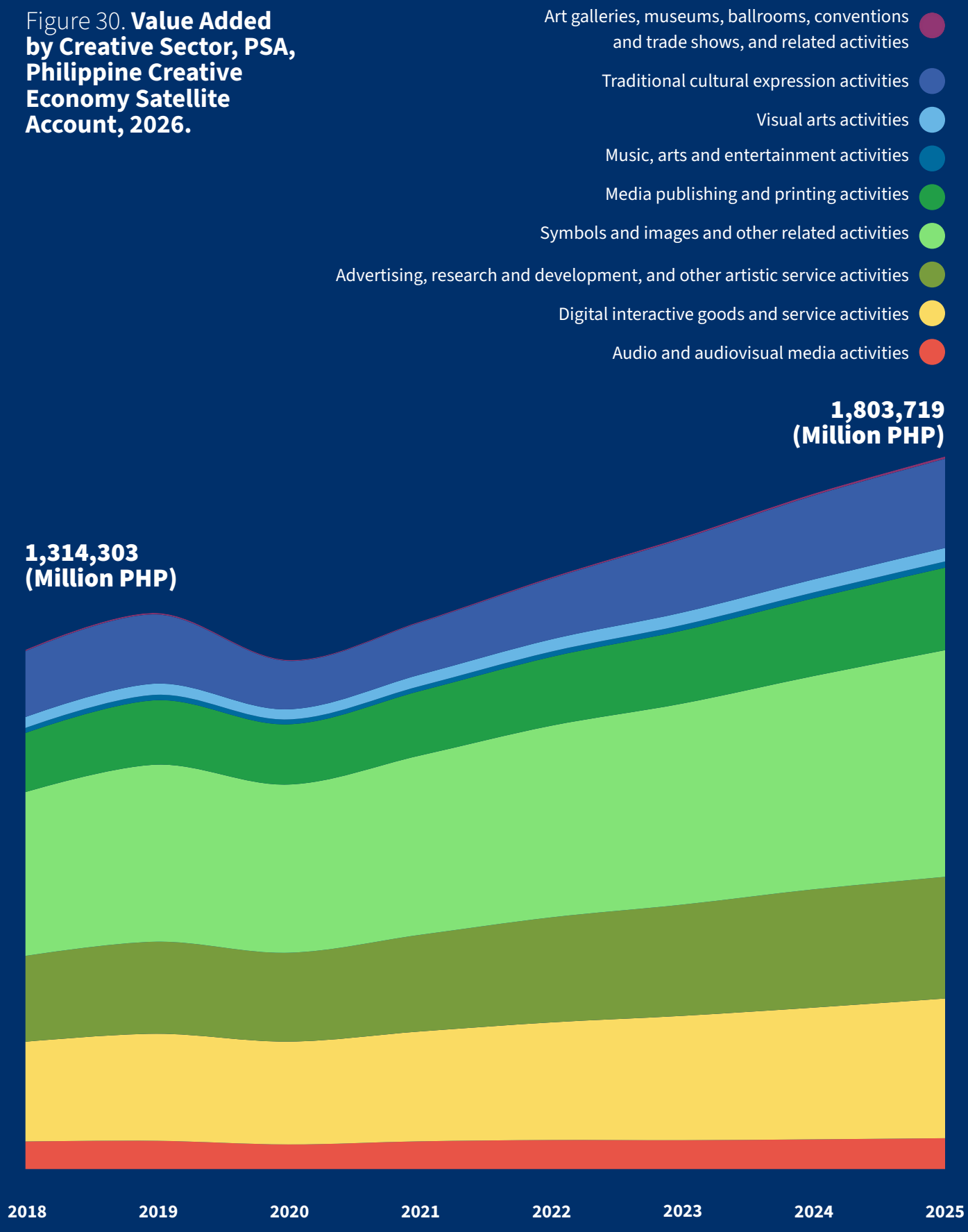
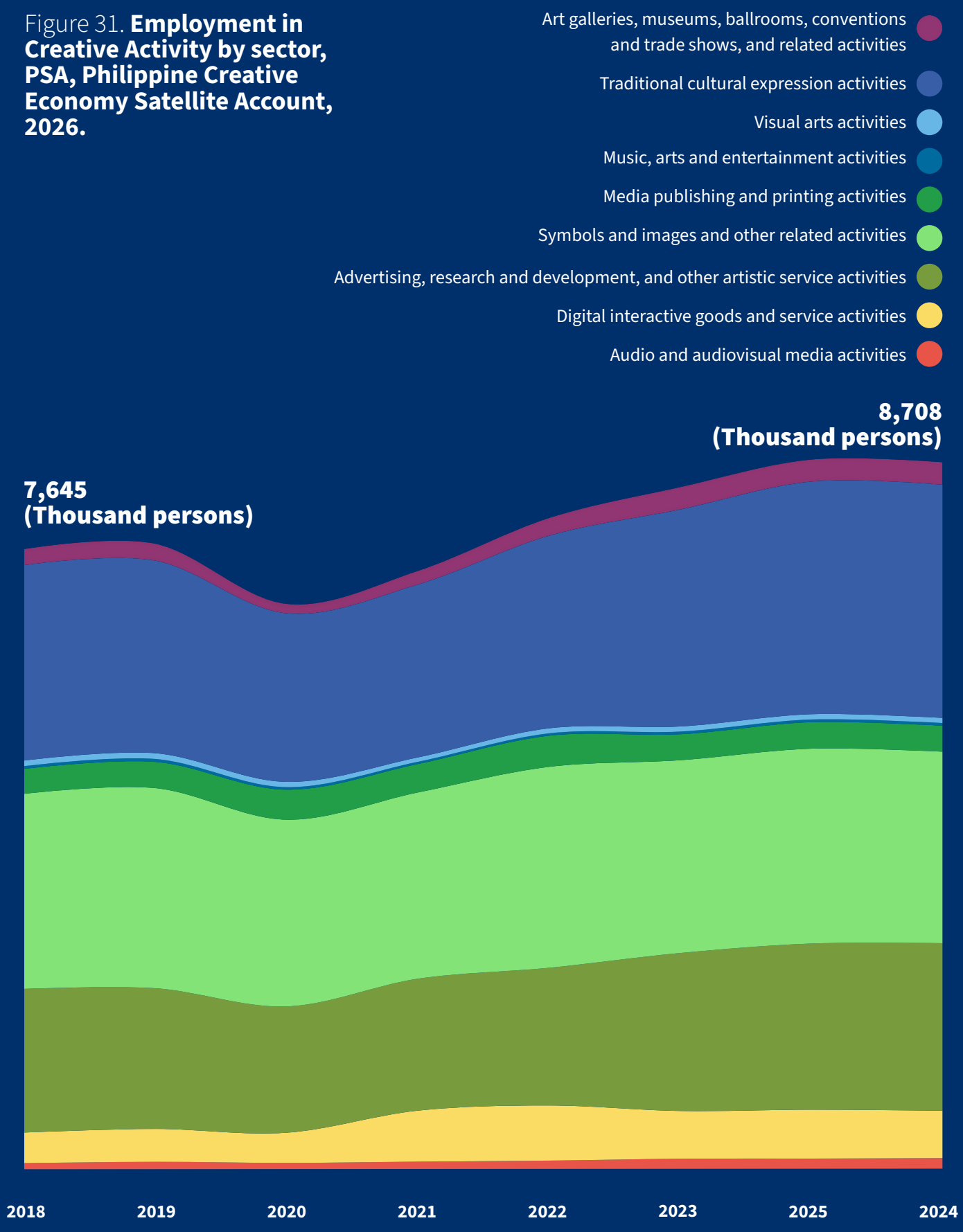


Figure 31. **Employment in Creative Activity by sector, PSA, Philippine Creative Economy Satellite Account, 2026.**



Aggregate productivity levels appear comparatively moderate, as significant differences exist across subsectors. While creative industries contribute approximately 8% of GDP (PSA, 2026c), they account for a larger share of employment, suggesting lower average labor productivity at the aggregate level. Labor productivity varies depending on the production structure of each industry (fig. 32). Sectors such as media publishing and printing exhibit comparatively higher levels of value added per worker. While activities such as traditional cultural expressions, symbols, and advertising tend to be more labor-intensive and generate lower output per worker. These patterns partly reflect the nature of cultural production itself, where many creative activities depend heavily on human input and offer limited opportunities for automation, consistent with Baumol's cost disease dynamics (Baumol, 2012).

The Philippines creative ecosystem demonstrates strong economic relevance, resilience, and employment generation capacity. The sector continues to expand its contribution to GDP, employment, and intellectual property generation, while digital and symbolic activities increasingly drive value creation. At the same time, differences in productivity and uneven levels of value capture across subsectors suggest opportunities to further strengthen innovation, commercialization, and higher-value creative production.

Figure 32. **Most Value-Intensive Industries in the Creative Economy in the Philippines, Own elaboration based on data from PSA, Philippine Creative Economy Satellite Account, 2026.**

5. Conclusion

Strong economic significance and notable institutional progress, although opportunities remain to strengthen value capture and innovation across the ecosystem. Recent policy developments, including the Creative Industries Development Act and the implementation of the Creative Economy Satellite Account, represent important milestones. They have strengthened institutional coordination and laid the foundation for more evidence-based policymaking. Output indicators confirm the sector's relevance, contributing around 8% to GDP and almost 18% to total employment.

Meaningful progress on the IP framework, particularly through modernization and a stronger recognition of IP as a financial asset. Targeted improvements are still needed in key areas of the IP framework, including CMO governance, online enforcement, dispute resolution, and IP awareness. Current gaps contribute to a disconnect between high digital consumption and low monetization.

Strengthening CMO performance, improving enforcement, particularly for online infringement, and advancing institutional accountability are essential to enhance value capture. Integrating these efforts into the broader creative economy framework will be critical to closing the gap between digital engagement and economic returns.

Structural constraints in skills, talent utilization, and innovation. Despite strong education levels and ICT capabilities, a mismatch persists between workforce skills and labor market outcomes, leading to underutilization of human capital. This reflects a broader reliance on service-oriented and outsourced activities, with limited progression into higher-value IP creation. Trade patterns reinforce this dynamic, with strong exports in creative services but continued dependence on imported IP-related products.

Aligning skills, R&D, and finance for higher-value creative outputs. Advancing towards the Philippines' 2030 ambitions therefore requires more than expanding the supply of skills. It requires strengthening the conditions under which these skills can be effectively utilized. This includes upgrading firm capabilities, fostering intermediate demand, and supporting the development of firms capable of producing and commercializing higher-value creative outputs. Greater alignment of R&D investment with the needs of the creative industries, together with stronger linkages between research, production, and markets, will be critical. In this context, improved access to finance, particularly mechanisms that recognize IP as a viable asset, can support risk-taking and enable firms to move from service provision towards original content creation and monetization.

Supporting both cultural preservation and scalable innovation. Recognizing the structural diversity of the creative economy is essential for effective policy design. While heritage-based and traditional sectors are often labor-intensive with limited productivity gains, digital segments, such as software, gaming, and digital content, offer significantly greater potential for scalability and innovation. More effective laws and public policies play a vital role in supporting this transition through targeted incentives, stronger IP protection, risk-sharing instruments, and financing mechanisms that encourage investment in higher-value and innovation-driven activities.

Beyond outsourcing, advancing up the value chain. From a macroeconomic perspective, the Philippines has successfully integrated into global value chains through service-oriented and outsourced activities. While this represents a significant strength, sustained economic upgrading will depend on moving into higher-value, innovation-driven segments. The country's comparative advantage in business process of outsourcing and creative services is therefore both an asset and a constraint. Recent declines in foreign direct investment in creative sectors may signal emerging limits to the current model, highlighting the need for strategic repositioning. Strengthening domestic innovation capacity, expanding IP ownership, and enhancing firm-level capabilities will be central to maintaining competitiveness and supporting long-term economic convergence.

Strengthening data systems to support IP commercialization, innovation, and long-term creative competitiveness. Data gaps remain a critical cross-cutting constraint, limiting the effectiveness of policy design and evaluation across the creative economy. More systematic, granular, and comparable data is needed on informality, piracy and enforcement outcomes, IP awareness, entrepreneurial attitudes, creative education, private financing mechanisms, household consumption of creative goods, and broader cultural participation. Strengthening this data infrastructure is essential to improve diagnostics and enable more targeted, evidence-based interventions addressing the report's central challenge: translating strong creative participation and export capacity into higher levels of domestic innovation, more effective IP commercialization, and more resilient revenue streams.

Filipino-owned IP assets and establishing a distinctive national creative brand are not only strategic priorities for economic upgrading, but also key drivers of long-term competitiveness and creative soft power. Therefore, it has the potential to generate positive feedback loops that reinforce innovation, value creation, and cultural influence across the ecosystem.

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7.
Annex

Acronyms

ADR	Alternative Dispute Resolution
ASEAN	Association of Southeast Asian Nations
BPO	Business Process Outsourcing
BCRR	Bureau of Copyright and Related Rights
CEDM	Creative Economy Data Model
CISAC	International Confederation of Societies of Authors and Composers
CMO	Collective Management Organization
DTI	Department of Trade and Industry
ILO	International Labor Organization
IPOPHL	Intellectual Property Office of the Philippines
ITU	International Telecommunication Union
IP	Intellectual Property
MOU	Memorandum of Understanding
NCIPR	National Committee on Intellectual Property Rights
PCESA	Philippine Creative Economy Satellite Account
PCIDA	Philippine Creative Industries Development Act
PCIDC	Philippine Creative Industries Development Council
PSA	Philippine Statistics Authority
TESDA	Technical Education and Skills Development Authority
UNESCO	United Nations Educational, Scientific and Cultural Organization
WIPO	World Intellectual Property Organization

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Supporting Empirical Evidence

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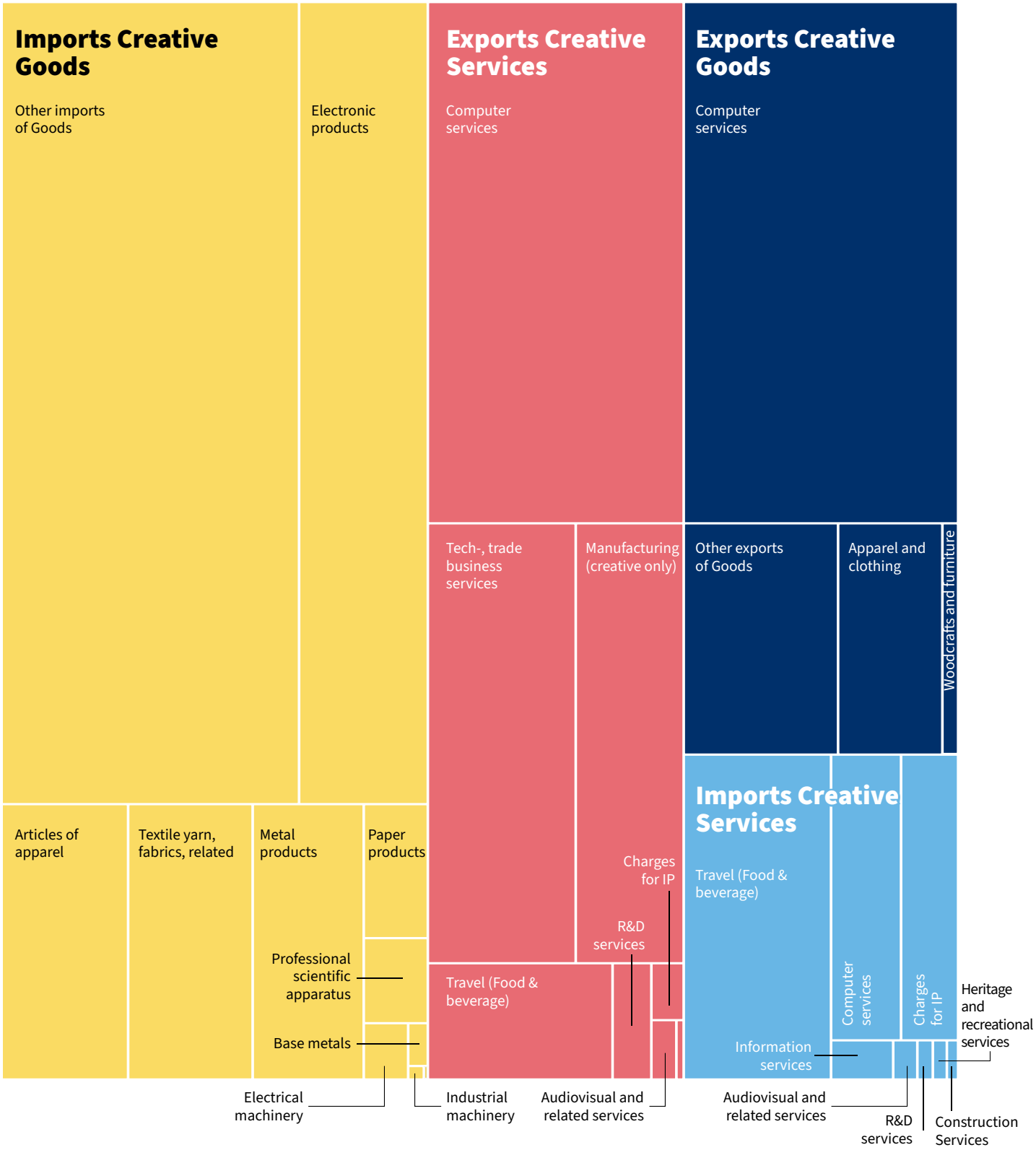

CEDM Methodology

Methodology: Composite indicator construction (CEDM)

Composite indicators summarize several underlying indicators into:

- Component scores within each CEDM element,
- Element scores (one per element), and

Radar charts visualize standardized scores, so a country's strengths/weaknesses are interpretable at a glance.

The composite indicator construction relies on a cleaned and validated country–year dataset covering a sufficiently considerable number of countries. Broad country coverage is required because normalization is based on cross-country variation. For ensuring comparability of results, missing values are not imputed. The composite indicator construction relies on a subset of countries with sufficient available data rather than aiming for full country coverage. Missing observations are therefore included as "Not Available" and are excluded from the aggregation process.

Definitions and notation

Let:

- c = country
- i = indicator
- d = dimension (component)[1]
- e = element
- $x_{i,c,t}$ = raw value of indicator for country in year

Selection of Variables

Indicators are not always available for the same reference year across countries. To address this, a latest-available-year rule is applied at the country–indicator level (OECD/European Union/EC-JRC, 2008). For each indicator and for the specific country for which the composite indicator is constructed, the most recent year with available data is selected (). As a result, reference years may differ across indicators and across countries, but each indicator's value reflects the latest information available for the country concerned.

Pre-normalization Transformation

When indicators are expressed as absolute counts (e.g., number of libraries, cinemas, or similar counts), values are converted into per-capita terms by scaling them per one million inhabitants, using total population figures. This ensures comparability across countries of different sizes. [2] Indicators reported as scores, percentages, or indices do not require further unit transformation. In addition, the direction of interpretation is harmonized across all indicators. Indicators for which higher values reflect poorer outcomes are inverted so that, for all indicators, higher values consistently indicate better performance (OECD/European Union/EC-JRC, 2008).

Normalization

To ensure comparability across indicators expressed in different units and scales, indicators are normalized using z-score standardization, computed across countries for the selected reference year. For each indicator and country , the standardized value is defined as:

1 For notational convenience, the term *component* is replaced by *dimension* and is denoted by *d*. This terminology is adopted for notational clarity and to avoid confusion with the country index *c*.

2 *European Commission, Joint Research Centre (2020). Knowledge4Policy – Competence Centre on Composite Indicators and Scoreboards: Step 5 – Normalisation.* **https://knowledge4policy.ec.europa.eu/composite-indicators/step-5-normalisation_en**

$$z_{i,c} = \frac{x_{i,c} - \mu_i}{\sigma_i}$$

where denotes the cross-country mean of indicator , and denotes the corresponding cross-country standard deviation. Under this transformation, standardized indicator values are expressed in units of standard deviations from the cross-country average. Values greater than zero indicate above-average performance relative to the reference group of countries, while values below zero indicate below-average performance. Z-score standardization is a widely used normalization method in composite indicator construction, as it places indicators on a common scale with a mean of zero and accounts for differences in cross-country dispersion, thereby facilitating meaningful aggregation (OECD/European Union/EC-JRC, 2008; European Commission JRC, 2020).

In specific cases, certain indicators are already reported in standardized statistical units and are therefore not subject to further normalization. For such indicators, the standardized value is defined as . An example is provided by the World Bank's Worldwide Governance Indicators, which report governance estimates in a standardized unit with an approximately zero mean (World Bank, 2023). Skipping z-score normalization is permitted only when the indicator is explicitly documented as already standardized on a comparable scale, and this exception is applied consistently across all countries.

Weighting and Aggregation

Each element is defined by a set of components (also referred to as dimensions). Each indicator is assigned to exactly one component. Component scores are constructed using the arithmetic mean, which implies equal weighting of all indicators within each component. Let be the set of indicators in dimension . The scripts compute the dimension score as a mean:

Equal weighting combined with arithmetic aggregation is widely used in composite indicator construction due to its transparency, simplicity, and ease of interpretation (OECD/European Union/EC-JRC, 2008). It ensures that no single indicator disproportionately influences the dimension score and facilitates clear communication of results.

Furthermore, each element score is computed as the mean of the element's dimension scores:

This gives one standardized element score for the referenced country.

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Composite Indicators Table

The table presents the indicators and data sources used to construct the composite indicators for each element of the CEDM. These composite indicators were subsequently aggregated to assess the overall performance of the Philippine creative ecosystem.

Element Governance

Component	Indicator	Description	Source
Rule of Law	Rule of Law	Rule of Law by the World Bank reflects how strongly individuals trust and comply with societal rules, including the effectiveness of contract enforcement, the protection of property rights, the functioning of law enforcement and judicial institutions, and the prevalence of crime and violence.	World Bank World Justice Project **Worldwide Governance Indicators | DataBank**
		Rule of Law by the World Justice Project combines constraints on government powers, absence of corruption, open government, fundamental rights, order and security, regulatory enforcement, civil justice, and criminal justice.	
	Government Effectiveness Index	Government Effectiveness captures perceptions and views of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies.	World Bank **Worldwide Governance Indicators | DataBank**

Component	Indicator	Description	Source
Liberty & participation	Academic freedom	To what extent is academic freedom respected.	V-Dem **Academic Freedom Index, 2025**
	World Press Freedom Index	Index is evaluated using five contextual indicators that reflect the press freedom situation: political context, legal framework, economic context, sociocultural context, and safety.	RSF Reporters without Borders **https://rsf.org/en/index**
	Freedom of association	To what extent are parties, including opposition parties, allowed to form and to participate in elections, and to what extent are civil society organizations able to form and to operate freely.	V-Dem **Freedom of Association Index, 1789 to 2025**
Absence of inequality	Gini coefficient	Gini index measures the extent to which the distribution of income among individuals or households within an economy deviates from a perfectly equal distribution.	World Bank **World Development Indicators | DataBank**
Trade regime	Freedom to Trade Internationally	The components in Freedom to Trade Internationally measure four trade restrictions: tariffs, quotas, hidden administrative restraints, and controls on exchange rates and the movement of capital.	Fraser Institute **dataset | Fraser Institute**
Entrepreneurship environment	Business Ready (former Ease of Doing Business Index)	The ease of doing business score helps assess the absolute level of regulatory performance over time.	B-Ready **Data | Business Ready** World Bank **Doing Business | DataBank**

Element Social & Cultural Environment

Component	Indicator	Description	Source
Social Cohesion	Inclusive Society Indicator	It incorporates young people not in education, employment, or training; equal access index; count on help; discrimination and violence against minorities; acceptance of gays and lesbians.	Social Progress Imperative **AlTi Global Social Progress Index**
	Interpersonal trust	Would you say that most people can be trusted or that you need to be very careful in dealing with people.	World Values Survey **WVS Database**
	Gender Inequality Index	The Index reflects gender-based disadvantages in three dimensions—reproductive health, empowerment, and the labor market.	UNDP **Documentation and downloads | Human Development Reports**
Cultural Capital	Importance of creative imagination	Imagination indicates the importance respondents place on encouraging creativity in children at home.	World Values Survey **WVS Database**
	Creative thinking abilities	Average score on the creative thinking performance reported by students.	OECD PISA **PISA 2022 Results (Volume III) | OECD**
	Number of sites in the World Heritage List	Number of Sites recognized for their cultural, natural, or mixed significance.	UNESCO **States Parties - UNESCO World Heritage Convention**
	Number of entries in Intangible Cultural Heritage List	Number of entries in Intangible Cultural Heritage List.	UNESCO **Browse the Lists of Intangible Cultural Heritage and the Register of good safeguarding practices - UNESCO Intangible Cultural Heritage**
Awareness of IP	Awareness of IP Rights	This indicator measures the proportion of individuals who report awareness or understanding of intellectual property rights, including copyrights, trademarks, patents, and related protections, as captured by perception-based survey data.	WIPO Pulse Survey **WIPO Pulse Global intellectual property perception survey 2023**

Element Knowledge, Talent & Skills

Component	Indicator	Description	Source
Creative training	Graduates from creative training	Percentage of graduates from Arts and Humanities, Social Sciences, Journalism, and information Programs.	UNESCO **UIS Data Browser**
Knowledge development	R&D investments	Gross Domestic Expenditure on R&D as percentage of GDP.	UNESCO **UIS Data Browser**
	Number of Researchers	Researchers per million inhabitants (FTE)	UNESCO **UIS Data Browser**
	Citable documents in Arts & Humanities	Number of citable publications in Arts & Humanities.	SCImago **Scimago Journal & Country Rank**
	Cited documents in Arts & Humanities	Number of cited publications in Arts & Humanities.	SCImago **Scimago Journal & Country Rank**
Skills	Highly skilled employment in CCI	Share of highly skilled workforce (managers, professionals, and technicians) in creative sectors.	ILO **Statistics on employment - ILOSTAT**
	Individuals with ICT skills: Digital content creation	Percentage of individuals with basic ICT skills in digital content creation.	ITU **Individuals with ICT skills: Digital content creation: Uploading self/ user-created content to a website to be shared - ITU DataHub**
	Foreign language education	Average adult English language proficiency assessing reading, listening, speaking, and writing.	EF **EF EPI | EF English Proficiency Index | EF Global Site (English)**
Employment conditions	Share of employees in CCI	Share of employment in creative activities and occupations (Percentage of people working in the creative sector).	ILO **ILOSTAT Data Explorer**
	Share of self-employed in CCI	Share of self-employment in creative activities and occupations.	ILO **Statistics on employment - ILOSTAT**

Component	Indicator	Description	Source
Workforce diversity	Gender diversity in employment	Share of women working in creative industries.	ILO **Statistics on employment - ILOSTAT**
	Gender diversity in senior management positions	Share of women in high skill positions in CCI.	ILO **Statistics on employment - ILOSTAT**

Element Infrastructure

Component	Indicator	Description	Source
Digital Infrastructure	Individuals using the internet	Proportion of individuals who have used the Internet from any location during the previous three months, regardless of the type of device or network used.	ITU **Data query - ITU DataHub**
	Pop coverage by mobile internet connection (LTE)	Percentage of inhabitants that are within range of at least a 4G/ LTE mobile-cellular signal, irrespective of whether they are subscribers.	ITU **Population coverage, by mobile network technology: At least LTE/ WiMAX - ITU DataHub**
Hard Infrastructure	LPI Logistics performance index	LPI ranks countries on six dimensions of trade, including customs performance, infrastructure quality, and timeliness of shipments.	World Bank **Indicator | Logistics Performance Index (LPI) Overall Score | World Bank Group**
Creative Infrastructure	Number of cinemas	Number of indoor cinemas	UNESCO **UIS Data Browser**
	Number of Museums	Number of Museums	UNESCO **Number of museums. Data by Countries from 2015 to 2023**

Element Demand

Component	Indicator	Description	Source
Digital Consumption	Individuals using the Internet, by type of activity: Streaming, playing, or downloading games, images, movies videos or music	Individuals using the internet by type of activity (reading and downloading newspapers, listening to web radio, watching web television, streaming, playing or downloading games, downloading software or applications, uploading self or user generated content, using storage space on the internet to save documents, using software run over the internet for editing.	ITU **Data explorer - ITU DataHub**
	Social Media users	Percentage of YouTube and Pinterest users.	Stat Counter **Social Media Stats Worldwide | Statcounter Global Stats**
Household spending for CCI	Number of individuals who purchased goods or services online, by type of goods and services purchased online sum of books, magazines, and newspapers; computer or video games; computer software; movies short films or images;	Number of individuals who purchase goods or services online (books, magazines or newspapers, computer or video games, computer software, movies, short films or images, music products, photographic telecommunications or optical equipment, tickets, or bookings for entertainment events). Number of individuals who purchase goods or services online (books, magazines or newspapers, computer or video games, computer software, movies, short films or images, music products, photographic telecommunications or optical equipment, tickets, or bookings for entertainment events).	ITU **Data explorer - ITU DataHub**
Trade of creative products	Imports of creative goods (Percentage of Merchandise)	Imports of creative goods as a percentage of total merchandise trade.	UNCTAD **CreativeGoodsValue**
	Exports of creative goods (Percentage of Merchandise)	Exports of creative goods as a percentage of total merchandise trade.	UNCTAD **CreativeGoodsValue**
	Trade in digitally deliverable services	Exports and Imports of total digitally delivered services in million US dollars.	WTO **WTO | Digitally Delivered Services Trade Dataset**

Classification of Creative Activity PSIC – Core Creative Industries Only

ISIC Rev 4	PSIC Code	Description	Segment
7310	M73101	Advertising Agency, Except Billboard and Outdoor Advertising	Creative services
7310	M73102	Billboard and Outdoor Advertising Services	Creative services
7310	M73103	Media Representation	Creative services
7310	M73104	Commercial Art Services	Creative services
7310	M73109	Advertising Services, N.E.C.	Creative services
7320	M73200	Market Research and Public Opinion Polling	Creative services
7740	N77400	Leasing of Intellectual Property and Similar Products, Except Copyrighted Works	Creative services
3290	C32994	Manufacture of Signs and Advertising Displays	Design
8220	N82293	Publishing outsourcing activities	Creative services
8220	N82295	Intellectual property research and documentation activities	Creative services
9412	S94120	Activities of Professional Membership Organizations	Creative services
4649	G46426	Wholesale of books, magazines, and newspapers	Publishing and printed media
4741	G47413	Retail Sale of Computer Software	New and Interactive Media
4774	G47742	Retail Sale of Books and Other Goods	Publishing and printed media
4789	G47894	Retail Sale of Music and Video Recordings	Audiovisuals
1820	C18203	Film and Video Reproduction	Audiovisuals
5912	J59120	Motion Picture, Video and Television Program Post-production Activities	Audiovisuals
5913	J59130	Motion Picture, Video and Television Program Distribution Activities	Audiovisuals
5914	J59140	Motion Picture Projection Activities	Audiovisuals
7729	N77293	Renting of Books, Journals and Magazines	Publishing and printed media
4762	G47620	Retail Sale of Music and Video Recordings in Specialized Stores	Audiovisuals
5920	J59201	Sound Recording Activities	Audiovisuals
5920	J59202	Publishing of Music	Performing arts
7810	N78104	Casting agencies activities	Performing arts
7810	N78105	Theatrical booking agency activities	Performing arts
8542	P85520	Cultural Education	Creative services
9000	R90001	Concerts and Opera or Dance Production	Performing arts
9000	R90002	Live Theatrical Presentations and Other Stage Productions	Performing arts

ISIC Rev 4	PSIC Code	Description	Segment
9000	R90003	Individual Artists Activities	Performing arts
9000	R90004	Ancillary Theatrical Activities	Performing arts
4789	G47896	Retail Sale of Books	Publishing and printed media
9000	R90006	Operation of Concert and Theatre Halls and Other Arts Facilities	Performing arts
9000	R90009	Other Creative, Arts and Entertainment Activities, N.E.C.	Performing arts
9329	R93291	Operation of Ballrooms, Discotheques (Disco's)	Cultural sites
1811	C18110	Printing	Publishing and printed media
1812	C18121	Electrotyping, Stereotyping and Photoengraving	Publishing and printed media
1812	C18122	Bookbinding and Related Work	Publishing and printed media
1812	C18129	Service Activities Related to Printing, N.E.C.	Publishing and printed media
4761	G47610	Retail Sale of Books, Newspapers and Stationery in Specialized Stores	Publishing and printed media
5811	J58110	Book Publishing	Publishing and printed media
5812	J58120	Publishing of Directories and Mailing Lists	Publishing and printed media
5813	J58130	Publishing of Newspapers, Journals and Periodicals	Publishing and printed media
5819	J58190	Other Publishing Activities	Publishing and printed media
6321	J63910	News Agency Activities	Audiovisuals
7490	M74903	Translation and Interpretation Services	Creative services
9101	R91010	Library and Archives Activities	Cultural sites
5911	J59110	Motion Picture, Video and Television Program Activities	Audiovisuals
6010	J60101	Radio Broadcasting and Relay Station and Studios	Audiovisuals
6010	J60102	Radio Program Production	Audiovisuals
6010	J60103	Radio Broadcasting Activities Over the Internet (Internet Radio Stations)	Audiovisuals
6021	J60201	Television Broadcasting and Relay Stations and Studios Including Closed Circuit Television Services	Audiovisuals
6021	J60202	Television Program Production	Audiovisuals
6021	J60203	Television Broadcasting Activities Over the Internet (Internet Television Stations)	Audiovisuals
5820	J58200	Software Publishing	New and Interactive Media
6201	J62010	Computer Programming Activities	Creative services

ISIC Rev 4	PSIC Code	Description	Segment
8541	P85510	Sports and Recreation Education	Sports and recreation
6202	J62020	Computer Consultancy and Computer Facilities Management Activities	Creative services
6209	J62090	Other Information Technology and Computer Service Activities	Creative services
6311	J63111	Data Processing	Creative services
6311	J63113	Application Hosting Services	Creative services
6311	J63112	Website Hosting Services	Creative services
6312	J63120	Web Portals	Creative services
6329	J63990	Other Information Service Activities, N.E.C.	Audiovisuals
7420	M74201	Digital Photograph Processing	Visual arts
7420	M74203	Photograph and Motion Pictures Processing (Not Related to Motion Pictures and Tv Industries)	Visual arts
7420	M74209	Photographic Activities, N.E.C.	Visual arts
7420	M74202	Commercial and Consumer Photograph Production (Except Aerial Photography)	Visual arts
7420	M74204	Film Developing and Printing and Photograph Enlarging	Visual arts
7420	M74205	Aerial Photography	Visual arts
7420	M74206	Microfilming Activities	Visual arts
7420	M74207	Underwater Photography	Visual arts

Classification of Creative Occupation PISCO

Creative Occupations (2022 Updates to the 2012 PSOC)	Description
1113	Traditional chiefs and heads of villages
1221	Sales and marketing managers
1222	Advertising and public relations managers
1223	Research and development managers
1330	Information and communications technology service managers
1349	Professional services managers not elsewhere classified
1431	Sports, recreation, and cultural center managers
2111	Physicists and astronomers
2131	Biologists, botanists, zoologists, and related scientists
2141	Industrial and production engineers
2142	Civil engineers
2144	Mechanical engineers

Creative Occupations (2022 Updates to the 2012 PSOC)	Description
2145	Chemical engineers
2149	Engineering professionals not elsewhere classified
2151	Electrical engineers
2152	Electronics engineers
2153	Telecommunications engineers
2161	Building architects
2162	Landscape architects
2163	Product and garment designers
2164	Town and traffic planners
2165	Cartographer and surveyors
2166	Graphic and multimedia designers
2230	Traditional and complementary medicine professionals
2269	Health professionals not elsewhere classified
2310	University and higher education teachers
2320	Vocational education teachers
2330	Secondary education teachers
2341	Primary school teachers
2351	Education methods specialists
2353	Other language teachers
2354	Other music teachers
2355	Other arts teachers
2356	Information technology trainers
2431	Advertising and marketing professionals
2432	Public relations professionals
2511	Systems analysts
2512	Software developers
2513	Web and multimedia developers
2514	Applications programmers
2519	Software and applications developers and analysts not elsewhere classified
2521	Database designers and administrators
2522	Systems administrators
2523	Computer network professionals
2529	Database and network professionals not elsewhere classified
2621	Archivists and curators

Creative Occupations (2022 Updates to the 2012 PSOC)	Description
2622	Librarians and related information professionals
2632	Sociologists, anthropologists, and related professionals
2633	Philosophers, historians, and political scientists
2636	Religious professionals
2641	Authors and related writers
2642	Journalists
2643	Translators, interpreters, and other linguists
2651	Visual artists
2652	Musicians, singers, and composers
2653	Dancers and choreographers
2654	Film, stage and related directors and producers
2655	Actors
2656	Announcers on radio, television, and other media
2659	Creative and performing artists not elsewhere classified
3118	Draftsmen
3230	Traditional and complementary medicine associate professionals
3322	Commercial sales representatives
3332	Conference and event planners
3339	Business services agents not elsewhere classified
3413	Religious associate professionals
3421	Athletes and sports players
3422	Sports coaches, instructors, and officials
3423	Fitness and recreation instructors and program leaders
3424	Esports players and coaches
3431	Photographers
3432	Interior designers and decorators
3433	Gallery, museum, and library technicians
3434	Chefs
3435	Artistic and cultural associate professional not elsewhere classified
3521	Broadcasting and audio-visual technicians
4411	Library clerks
5113	Travel guides
5141	Hairdressers
5142	Beauticians and related workers

Creative Occupations (2022 Updates to the 2012 PSOC)	Description
5164	Pet groomers and animal care workers
5169	Personal services workers not elsewhere classified
5241	Fashion and other models
7113	Stonemasons, stone cutters, splitters, and carvers
7115	Carpenters and joiners
7125	Glaziers
7131	Painters and related workers
7132	Spray painters and varnishers
7213	Sheet metal workers
7221	Blacksmiths, hammersmiths and forging press workers
7222	Toolmakers and related workers
7311	Precision-instrument makers and repairers
7312	Musical instrument makers and tuners
7313	Jewelry and precious metal workers
7314	Potters and related workers
7315	Glass makers, cutters, grinders, and finishers
7316	Sign writers, decorative painters, engravers, and etchers
7317	Handicraft workers in wood, basketry, and related materials
7318	Handicraft workers in textile, leather, and related materials
7319	Handicraft workers not elsewhere classified
7321	Pre-press technicians
7322	Printers
7512	Bakers, pastry-cooks, and confectionery makers
7513	Dairy products makers
7522	Cabinet-makers and related workers
7531	Tailors, dressmakers, furriers, and hatters
7532	Garment and related pattern makers and cutters
7533	Sewing, embroidery and related workers
7534	Upholsterers and related workers
7535	Pelt dressers, tanners, and fellmongers
7536	Shoemakers and related workers
7549	Craft and related workers not elsewhere classified
8132	Photographic products machine operators
8156	Shoemaking and related machine operators