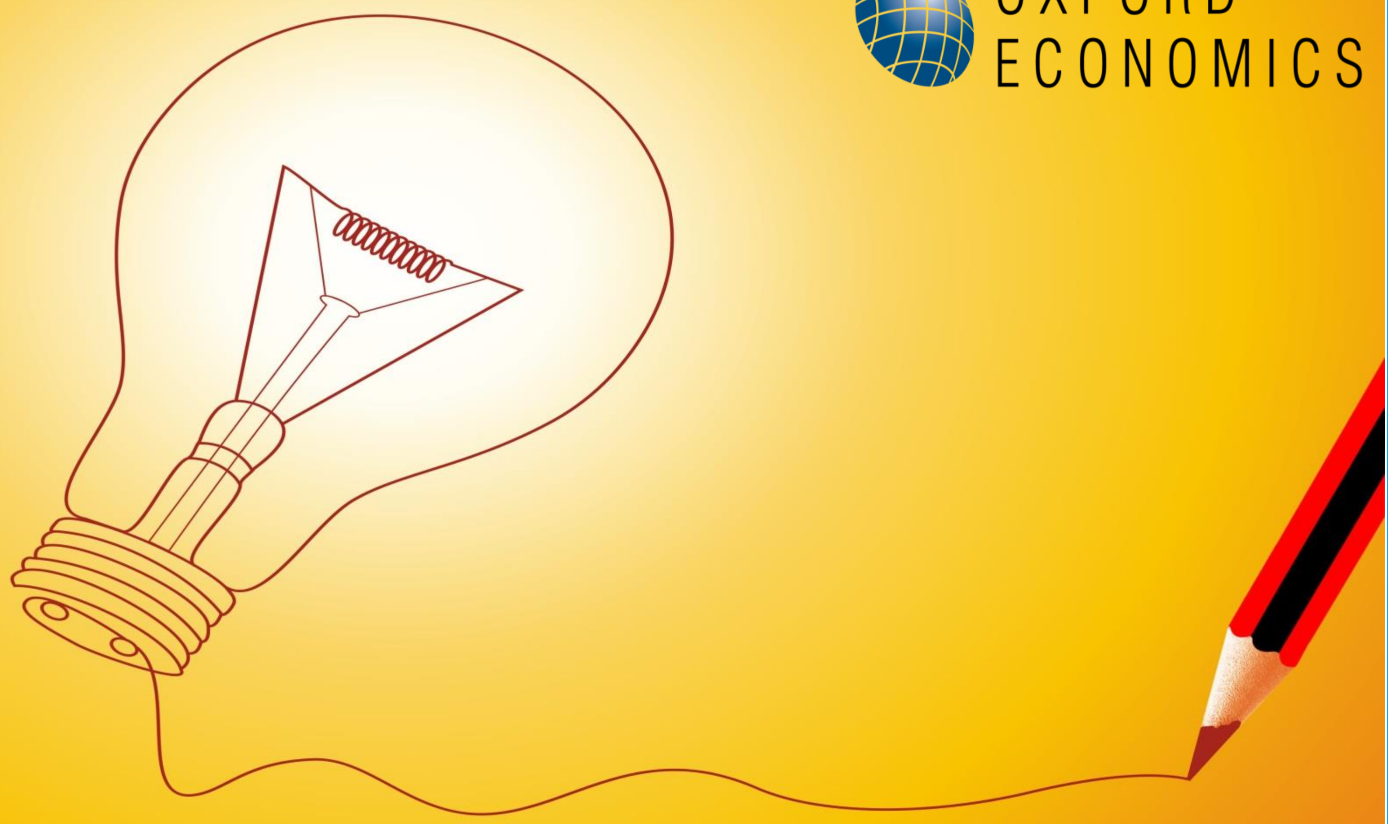

OXFORD ECONOMICS

THE ECONOMIC IMPACT OF THE CREATIVE INDUSTRIES IN THE AMERICAS

The aim of this research is to assess and demonstrate the economic contribution and potential of the creative and cultural industries in the countries of the Americas and 10 benchmark countries. This report provides an overview of the availability of data and makes recommendations on how to improve the measurement of this important sector.

On behalf of:

Organization of American States

BRITISH COUNCIL

IDB Inter-American Development Bank

Executive summary

- **The creative and cultural industries[1] constitute one of the fastest-growing sectors globally**. The sector is forecast to play a bigger role in coming years. If the countries of the Americas[2] are to achieve a balanced, high-growth economy, it is vital that the key strengths of businesses in the creative sector are nurtured. Accordingly, the Organization of American States, the Inter-American Development Bank and the British Council have commissioned Oxford Economics to undertake this research to better showcase the economic impact and potential of creative industries across the Americas and in comparison with selected benchmark countries around the globe. The report highlights the need to further develop common statistical frameworks to support evidence-based policy-making that enables the sector to continue to flourish and contribute to growth, employment, and development.
- **The creative industries represent untapped economic potential, and make a positive contribution to the innovation economy and other sectors of the economy through supply chain effects.** If the Americas are to continue to increase competitiveness in this changing global environment, they need to put in place the right conditions for creativity and innovation to prosper in a new entrepreneurial culture. There is a lot of untapped potential in the cultural and creative industries to create growth and jobs. Many recent studies have shown that the creative industries represent highly innovative companies with a great economic potential and are one of the most dynamic sectors in the Americas.
- **The creative industries are set to become an increasingly important contributor to GDP growth across the region.** In the two largest economies of the hemisphere, Brazil and the United States, the creative industries are estimated to account for over 10% of GDP. To place this in context, 11% of GDP in the US is roughly equivalent to the size of the entire US manufacturing sector or about one-fifth of the world's manufactures. In other countries in the region the GDP contribution of the sector is estimated to be smaller between 2% to 7% in Argentina, Mexico, and Peru, highlighting the scope for catch up and illustrating the high growth potential of the sector. With regard to growth the sector is showing significant promise, with data highlighting that the sector is accounting for a growing share of national GDP in countries such as Argentina, Brazil, Colombia, Paraguay, and the United States.
- **The sector can provide new employment opportunities.** The creative sector is a major source of dynamism for the economies of the Americas, growing rapidly with the potential to generate creativity, innovation and enterprise across a wide range of activities. The sector is already an important provider of employment in some economies, accounting for between 5 to 11% of employment in Canada, Colombia, Mexico and Trinidad and Tobago, with employment forecast to continue to grow in the sector.

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[1] Reference to the "creative industries" in this report is meant to encompass both creative and cultural industries. The term "creative industries" has different meanings and uses throughout the world; for purposes of this report, the term covers the following sectors: Advertising; Art Crafts; Audio-Visual / Film; Cultural Heritage; Design; Entertainment Software, including Video Games; Fashion; Music; Publishing; Performing Arts; and Visual Arts.

[2] Reference to the "countries in the Americas" in this report refers to the OAS member states (or the non-benchmark countries) listed on p. 8.

- **A global market for creative goods and services is growing rapidly and outperforming other exportable sectors.** The sector is also becoming increasingly international, with both creative goods and creative services traded in international markets, highlighted by growth in global creative exports at over 10% per annum for much of the past decade. The Americas account for approximately $87 billion of world creative exports, approximately 14% of the world total. It is worth highlighting that the region accounts for almost two-fifths of global 'personal, cultural and recreational services' (which includes audio-visual services) exports and over one quarter of global 'visual arts' exports illustrating its position as a world leader.
- **Creative industries have continued to perform well during the recent global recession.** Resilience to the crisis is also evident in the exports of creative services; they have grown at 4.3% per annum since the global recession began in 2008. As a rapidly growing international market, this presents an opportunity for countries that are engaged in international trade of creative goods and services. The sector's resilience and the evidence that it is an important provider of employment opportunities is all the more interesting because creative sectors have a higher percentage of youth employment than the rest of the economy, at a time of record high youth unemployment in both developed and developing countries.
- **Trends in cultural consumption and infrastructure provide the context for future development.** As shown in changing advertising distribution patterns, the soaring consumption of videogames, the continual disappearance of newspapers, and wider access to the Internet, successful business models are in constant evolution. If the Americas are to continue to increase their global competitiveness and harness the dividends of nurturing their creative economies, policy interventions need to take into account the fluid dynamics of modern creative businesses.
- **Market intelligence for growing sectors is important to enable 'evidence-based' policymaking.** There is an evident lack of knowledge base on the economic impact of the creative industries both nationally and internationally. This research has signposted the available evidence to demonstrate economic contribution and potential; further research is required to better understand the economic impact of the sector. An enhanced evidence base could be used to argue in favour of measures, policies or initiatives that would help to encourage growth in the creative industries.
- **Estimating the contribution of culture to the economy across the Americas poses challenges.** The lack of an agreed framework for researchers to follow leads to widely varying estimates on the scale of the sector. Due to the dynamic and diverse nature of the sector, it often does not align well with official statistical measurement frameworks, which tend to use Standard Industrial Classification (SIC) codes or Standard Occupational Classification (SOC) codes.
- **Common definitions and methodologies are necessary.** Efforts in this direction will lead to a more fluid and effective exchange of ideas across the Americas, helping overcome the challenge of producing statistics for a sector where there is rapid technological and market change. The search for a minimum common ground is underway, albeit far from consolidated. This could be achieved by adopting an internationally recognised statistical framework such as UNESCO's published framework for cultural statistics using detailed International Standard Industrial Classification (ISIC) and International Standard Classification of Occupations (ISCO) codes, or developing a new agreed definition for the region using ISIC and ISCO codes common to all countries as a base.

- **Governments are currently reliant upon non-economic data to provide intelligence in many countries.** Very few countries in the world publish reliable, continuous, comparable data of the creative industries. Infrastructure and creative consumption variables are used as proxies. Information on the cultural infrastructure within a country can be valuable information for policymakers in the absence of the availability of GDP and employment in numbers. Cultural atlases, like those of Argentina, Costa Rica, Ecuador, Jamaica, Mexico and Peru are good examples of this.
- **Addressing data gaps and leveraging existing sources.** There are a number of useful data providers publishing information relating to the creative industries, but with limited country coverage of the smaller states in the Americas. There is an opportunity to open dialogue with existing data providers to scope the potential for additional countries to be added to improve their data coverage, and help national statistics institutes to measure better the creative sector.
- **Cultural satellite accounts are providing invaluable information for policy makers and represent a comprehensive model for the measurement of the economic contribution of national cultural statistics.** The cultural satellite account is an economic information system for cultural products and the activities that create them. The development of cultural accounts is an extremely positive recent development in the statistical measurement of the sector, and can be an informative tool for governments to draw upon to enable evidence based policy making for the creative and cultural industries. Argentina, Canada, Chile, and Colombia already produce cultural satellite accounts. Brazil, Costa Rica, the United States and Uruguay have made advanced progress towards the development of their satellite accounts, while Bolivia, Ecuador and Peru are currently in the initial stages of developing their own, respectively. The expansion in the number of countries producing satellite accounts is hugely important and will provide enhanced market intelligence on the evolution of the sector, identifying growth markets within the sector. It should be noted that governments should not undertake the development of their satellite accounts in isolation, and the development of satellite accounts should be undertaken in partnership with other countries and international organizations working in this field, to ensure that the accounts are produced using the same methodology and definition of the sector to enable accurate comparisons among countries.
- **Ensuring best practices in statistical methods should also apply to the creative industries.** Experiences such as cultural atlases and satellite accounts of culture must be shared and developed across the Americas cooperatively. This will encourage and help smaller countries to catch up and coordinate better in the common development of a hemispheric creative economy.
- **Ensuring stakeholder buy-in:** Developing the creative economy should not and cannot be undertaken merely by public initiative. Implementing new processes to improve measurement will require investment and expertise from partners in industry and civil society. With the sector becoming an increasingly important driver of growth, a commitment across the board will be essential to effectively develop the required evidence-based policy.

The economic impact of the creative industries

Introduction

- The creative economy has become a topical issue of the international economic and development agenda during this decade, calling for informed policy responses in both developed and developing countries. The sector has outperformed many other traditional growth sectors during the recession, increasing its economic performance and providing employment opportunities during a period of slow global economic growth.
- In recent years countless academic publications and reports have discussed the role of innovation, culture or creativity in development processes. The EU highlights that cultural and creative industries breathe new life into declining local economies and spawn new economic activities, thereby creating new sustainable jobs and making the regions and cities of Europe more attractive.[3] The OECD also stresses the role of the cultural and creative industries as a lever for social and personal development. Such industries generate economic growth and constitute the core of the definition of "global competitiveness."[4] The sector also has notable supply chain linkages, purchasing materials from other sectors and thus contributing to their growth. Notably the creative sector has strong supply chain linkages with other creative sectors which has high 'within sector' multiplier effects which contribute to rapid growth.[5]
- An increasing number of governments across the globe are identifying the creative industries as a priority sector in their national development strategies, and expressing the need to build capacity to better measure the economic impact of these activities to inform their policy responses.
- With its growing importance in the global economy there is a need for better understanding of the dynamics and needs of the creative economy. In this context, improved and up-to-date regional and national mappings of economic indicators related to creative activity are critically important to help shape policy to help increase economic growth through culture.
- The creative industries are particularly important in the countries of the Americas. The Organization of American States (OAS) with the Inter-American Development Bank (IDB) and the British Council (BC) have collaboratively commissioned Oxford Economics to conduct a study on the economic impact of the creative industries in the Americas.
- Each organisation has a specific rationale and interest in the creative industries sector in the region:
- **OAS:** The Organization of American States is the main political, juridical, and social governmental forum in the Hemisphere. It carries out the essential purposes for which it was established on the basis of four mutually reinforcing pillars: democracy, human rights, multidimensional security and integral development. The principal goal of the OAS with respect to development is

[3] European Commission (2010): Green paper. Unlocking the potential of cultural and creative industries.
[4] OECD (2005): Culture and Local Development.
[5] NESTA (2008) Creating innovation: Do the creative industries support innovation in the wider economy?

to support member states in their efforts to reduce poverty and inequity. The issue of creative and cultural industries is a cross-cutting issue that covers several areas of focus for the OAS, including culture, competitiveness, innovation, trade, tourism and facilitating the participation of small and medium-sized enterprises in domestic and international markets. One priority mandated in the area of culture specifically, is to support "member states in their efforts to build capacity to measure the social and economic impact of cultural activity, and to gather, analyze and disseminate information on culture through the exchange of information and practice in cultural information systems." National systems, such as satellite accounts, and up-to-date information on the economic contribution of the cultural and creative sectors, are critical to develop common indicators, the data infrastructure, and the institutional and human capacity to inform the design of public policies, implement programs to increase economic growth, and promote development through culture and innovation. Additionally the OAS is focused on "promoting intercultural dialogue, creativity, and artistic expression and enhancing awareness and respect for cultural and linguistic diversity." For more information about the work of the OAS, visit www.oas.org.

- **IDB:** The IDB is the main source of multilateral financing in Latin America and the Caribbean. It provides solutions to development challenges and support in the key areas of the region. Through its Cultural Center, the IDB supports collaborative and innovative initiatives for the advancement of culture and creativity as agents of social and economic development in the region. The work of the Cultural Center as regards the cultural and creative economy focuses on three interdependent areas: 1) collection, analysis and dissemination of statistics; 2) identification and promotion of concepts and best practices; and the 3) multidisciplinary generation of innovative ideas to stimulate political engagement. For more information on the IDB Cultural Center, visit www.iadb.org/cultural.
- **British Council:** The British Council is the UK's international organisation for cultural relations and educational opportunities and is represented in 110 countries worldwide. The Creative Economy Unit was established in 1999 as part its Arts Department to work with UK and international creative industries and cultural policy-makers to co-create programmes that empower local creative talent, boost cultural policy, improve infrastructure development and increase international connections. By helping to shape thinking amongst policy-makers while also building entrepreneurial and leadership capacity, the British Council aims to encourage collaborative change across sectors and increase collaborations between cultural production, enterprise and digital technology, accelerating growth in R&D and new business models in culture. For more information about the work of the British Council, visit www.britishcouncil.org/creativeeconomy.
- The three organisations are committed to working together on a collaborative basis to help encourage the development of the creative industries, with the first stage of this process being to ensure timely, accurate and policy-relevant statistics are available for the sector in today's increasingly complex and rapidly changing social, political and economic environments. The availability of data is extremely important, notably to help develop evidence based policy. For example, it is important that governments are able to track the evolution of the sector and adapt policy responses to encourage growth, and demonstrable economic impacts are essential to secure both public and private finance.
- This report forms one of the outputs of the research project, alongside 45 excel data files and 7 country summary dashboards. The excel files provide a centralized location where all data

relating to the creative industries that is currently published are housed, providing a one stop shop for all data relating to the sector and highlighting areas where there are data gaps. The dashboards showcase the available data to demonstrate the economic impact of the sector in Brazil, Chile, Colombia, Guatemala, Mexico, Peru, and Trinidad & Tobago.[6]

Objectives and scope of the research

- The key objective of this research is to assess and demonstrate the economic contribution and potential of the creative and cultural industries in the countries of the Americas and 10 additional benchmark countries, including the effect of these industries on economic growth, jobs, and investment, through the assembling of country and industry datasets in excel format.
- The countries included in this research are listed in the box below.

[6] These countries were selected based on factors such as the quality and availability of data.

Countries in the Americas

Antigua and Barbuda

Argentina

Bahamas

Barbados

Belize

Bolivia

Brazil

Canada

Chile

Colombia

Costa Rica

Dominica

Dominican Republic

Ecuador

El Salvador

Grenada

Guatemala

Guyana

Haiti

Honduras

Jamaica

Mexico

Nicaragua

Panama

Paraguay

Peru

Saint Kitts & Nevis

Saint Lucia

Saint Vincent and the Grenadines

Suriname

Trinidad and Tobago

United States of America

Uruguay

Venezuela

Benchmark countries

China

Italy

Jordan

Malaysia

Mauritius

Philippines

South Africa

South Korea

Spain

United Kingdom

- In this report, Oxford Economics has concentrated on collecting all available data and statistics that fall under a number of key headings common across most definitions of creative industries.

Advertising

Art Crafts

Audio-Visual / Film

Cultural Heritage

Design

Entertainment Software, including Video Games

Fashion

Music

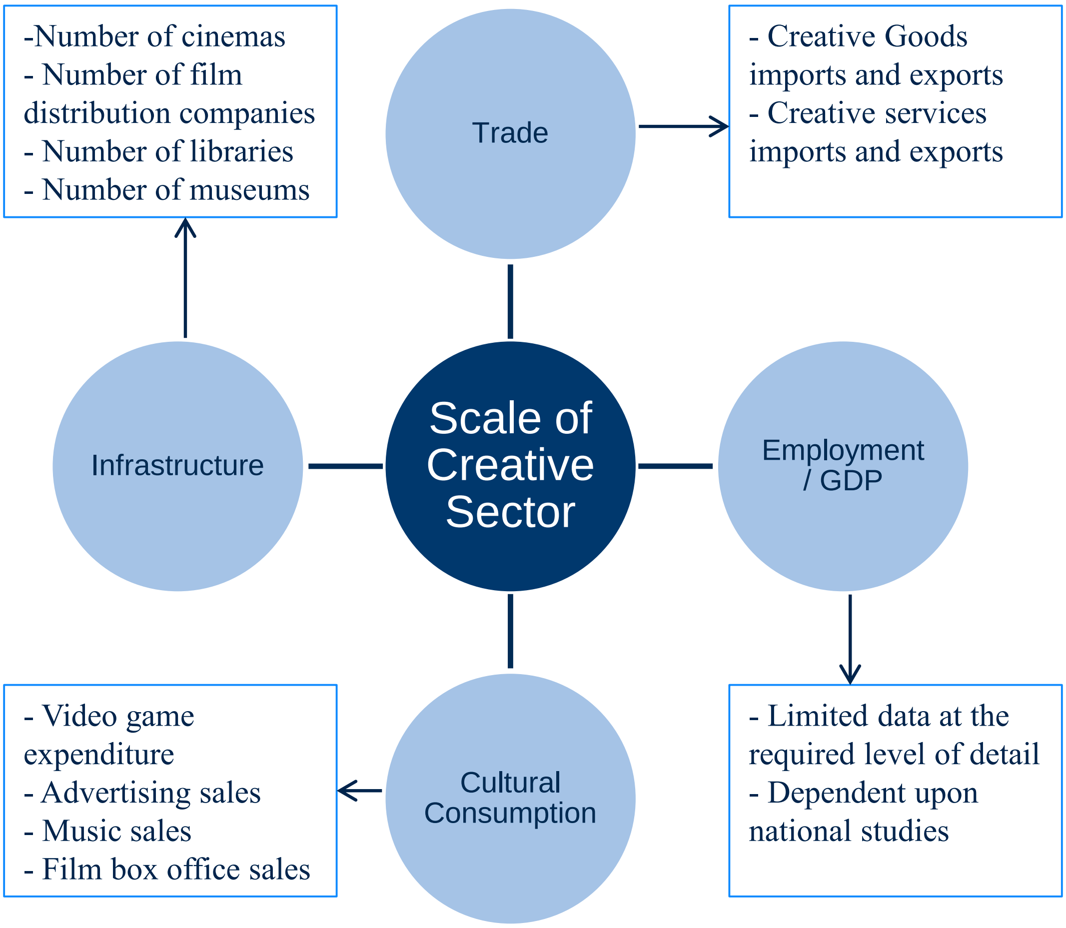
Publishing

Performing Arts

Visual Arts

- Ideally the best data to provide insight into the sector relates to employment, GDP and trade. However, in a number of countries this level of detail is unavailable or unquantifiable. We have also collected any data available relating to either creative consumption or creative infrastructure. Figure 1.1 below summarises the types of data we have collected as part of this research project.

Figure 1.1: Creative industries data collection



- Oxford Economics has collected data using national public and private data sources, as well as international bodies including the United Nations Conference on Trade and Development (UNCTAD), the World Intellectual Property Organization (WIPO), and the United Nations Educational, Scientific, and Cultural Organization (UNESCO).
- The Inter-American Committee on Culture (CIC) invited Oxford Economics to present the initial findings of this study during the Committee's fifth regular meeting held at OAS headquarters in Washington, DC on March 22, 2013. Oxford Economics set out for the CIC the objectives and outputs of the study and provided an overview of the data availability on creative industries in the countries of the Americas and benchmark countries. The presentation highlighted the importance of improving measurement and data coverage to identify niche growth markets, to track the evolution of the sector, and to support policy officials in fostering a trading environment that helps the creative sector to continue to grow. Representatives of UNESCO's Regional Center for the Promotion of Books in Latin America and the Caribbean (CERLALC) and the Convenio Andrés Bello (CAB) or Andrés Bello Convention commented on ongoing efforts toward the harmonization of culture accounts in the region, as did several representatives[7] among the 27 member state delegations in attendance. The CIC welcomed this research

[7] Barbados, United States, Canada, Costa Rica, Dominican Republic, Paraguay, Colombia, Chile, and Guatemala made statements during the meeting; the Andean Community (CAN) sent a note, reporting on the recent resolution adopted by its member states committing them to establish national cultural satellite accounts.

initiative commissioned by the three institutions. Member states were invited to offer further comments and assist in the data collection.[8]

- Following the meeting, Oxford Economics contacted all CIC official representatives for assistance in collecting national statistics, which opened a constructive dialogue with member states and provided access to additional data not publically available being shared with Oxford Economics and reflected in this report. Oxford Economics also undertook a large consultation exercise with the statistical authorities in each member state, discussing data availability with statistical experts in each country and providing them with data spreadsheets to verify the quality of the results and ensure that no available data relating to the sector were missing in the report.[9]

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[8] The Report of the Fifth Regular Meeting of the Inter-American Committee on Culture (CIC) (CIDI/CIC/doc.8/13) and other CIC documents, including the presentation by Oxford Economics, can be found in Documents of the V Regular Meeting of the CIC at http://portal.oas.org/Portal/Topic/SEDI/Educaci%C3%B3nyCultura/Cultura/Comisi%C3%B3nInteramericanadeCultura/Reunionesplenarias/VReuni%C3%B3nOrdinaria/tabid/1950/Default.aspx?language=en-us

[9] *See* "Acknowledgements" at the end of this report.

Layout of this report

The remainder of this report is structured as follows:

- Defining the creative industries
- Availability of data on the creative industries
- Conclusions and recommendations
- Appendix 1: DCMS creative industries definition
- Appendix 2: UNESCO cultural industries proposal definition
- Appendix 3: UNESCO review of labour force surveys
- Appendix 4: Global creative trade
- Appendix 5: WIPO copyright industries
- Appendix 6: Data matrix of data availability
- Acknowledgements

Defining the creative industries

Diversity of terms used for the creative economy

- The term creative industries **has different meanings and uses throughout the world**. In its broadest sense it is used to refer to all the industries that generate copyright, patents and trademarks. In other contexts it is used to refer only to such industries that produce creative and artistic content.
- Possibly the most accepted definition at an international level is that of the Department of Culture, Media and Sport (DCMS) in the UK. According to the DCMS, creative industries are those that "*have their origin in creativity, individual skills and talent and have the potential to create wealth and employment through the generation and exploitation of intellectual property.*"[10]
- According to UNESCO, the term "**cultural industry**" applies to those industries that combine the creation, production and marketing of content that is by nature cultural and intangible. Content is protected by intellectual property rights and can take the form of goods and services.
- Although cultural and creative industries are considered to be one and the same in some of the reviewed texts, in others cultural industries are shown as a sub-group of the creative industries.
- The CAB also **distinguishes between cultural activities and cultural goods**. The cultural field comprises cultural activities (museums, libraries and festivals, which make up a part of heritage) and cultural goods (publishing, music, film, etc.).
- Another common term used to describe the sector is the **copyright industries**, which lies at the heart of the definition used by WIPO. The copyright-based industries are defined as those industries in which copyright plays an identifiable role in creating tradable private economic (property) rights and income from use of these economic rights.
- The copyright industries include a number of sectors such as music, which is common across most accepted definitions (see table below). However, the copyright industries only include fashion and architecture as partial copyright industries, whereas the DCMS definition of creative industries includes both these sectors.

[10] DCMS (2001), Creative Industries Mapping Document 2001 (2 ed.), London, UK: Department of Culture, Media and Sport.

Table 1.2: Classification systems for the creative industries from different models

UK DCMS model	Symbiotic texts model	Concentric circles model	WIPO copyright model
Advertising	**Core cultural industries**	**Core creative arts**	**Core copyright industries**
Architecture	Advertising	Literature	Advertising
Art and antiques market	Film	Music	Collecting societies
Crafts	Internet	Performing arts	Film and video
Design	Music	Visual arts	Music
Fashion	Publishing	**Other core cultural industries**	Performing arts
Film and video	Television and radio	Film	Publishing
Music	Video and computer games	Museums and libraries	Software
Performing arts	**Peripheral cultural industries**	**Wider cultural industries**	Television and radio
Publishing	Creative arts	Heritage services	Visual and graphic art
Software	**Borderline cultural industries**	Publishing	**Interdependent copyright industries**
Television and radio	Consumer electronics	Sound recording	Blank recording material
Video and consumer games	Fashion	Television and radio	Consumer electronics
	Software	Video and computer games	Musical instruments
	Sport	**Related industries**	Paper
		Advertising	Photocopiers, photographic equipment
		Architecture	**Partial copyright industries**
		Design	Architecture
		Fashion	Clothing, footwear
			Design
			Fashion
			Household goods
			Toys

Source: United Nations (2008), Creative Economy Report 2008: The Challenge of Assessing the Creative Economy: towards informed Policy-making

- **It is this diversity of the definitions that makes comparisons difficult, both within countries and internationally**. For example, in Brazil the national statistics agency (Instituto Brasileiro de Geografia e Estatística) has estimated employment at approximately 1.8% of total employment, whereas UNESCO and UNCTAD estimate 3.8% and 0.95% of total employment respectively (see table below**). The lack of an agreed framework for researchers to follow leads to widely varying estimates on the scale of the sector.**

Table 1.3: Formal employment according to different creative methodologies by regions

Methodology	Brazil		South east region		State of Sao Paulo		Metropolitan region of Sao Paulo		Municipality Sao Paulo	
	Number	%	Number	%	Number	%	Number	%	Number	%
Formal employment	41,207,548	100%	21,098,135	100%	12,079,131	100%	6,722,364	100%	4,621,085	100%
Firjan	6,635,379	16.1%	3,465,671	16.4%	2,029,607	16.8%	1,164,805	17.3%	805,505	17.4%
DCMS	2,281,527	5.5%	1,150,067	5.5%	684,659	5.7%	380,450	5.7%	295,451	6.4%
UNESCO	1,527,721	3.8%	927,307	4.4%	511,362	4.2%	316,637	4.7%	237,537	5.1%
Fundap	753,178	1.8%	464,927	2.2%	296,231	2.5%	215,982	3.2%	140,499	3.0%
IBGE	751,539	1.8%	437,395	2.1%	279,049	2.3%	183,490	2.7%	134,969	2.9%
OIC	729,053	1.7%	468,788	2.2%	277,694	2.3%	210,544	3.1%	151,194	3.3%
UNCTAD	390,454	0.9%	231,623	1.1%	136,536	1.1%	103,482	1.5%	81,195	1.8%

Source: Firjan, Department of Culture Media and Sport (DCMS), UNESCO, Fundap, Instituto Brasileiro de Geografia e Estatística, Observatorio de Industrias Creativas (OIC) and UNCTAD

- The lesson to be learned is that **comparisons can only be made when using a consistent methodology, comparing results from different studies using different methodologies can lead to inaccurate conclusions being drawn.**

Differences in definitions across countries

- Often where countries are using a similar term for the sector, they use a different sector definition. This is not only an issue for the Americas, but applies to all economies across the globe.
- For example the UK includes fashion in its definition of the creative industries, but France does not; and France includes architecture in its definition of the cultural industries, whereas Spain does not (see Table 1.4 below).

Table 1.4: Comparison of four countries: definitions of the creative/cultural industries

	UK	Germany	Spain	France
Term used	Creative industries	Culture & creative industries	Culture industries	Cultural sector
Architecture	X	X		X
Audio-visual (film, TV, radio)	X	X	X	X
Performing arts	X	X	X	X
Libraries			X	X
Design	X	X		
Art market / visual arts	X	X	X	X
Publishing	X	X	X	X
Fashion	X			
Software / multimedia	X	X		
Museums / cultural heritage			X	X
Music	X	X	X	X
Crafts	X			
Advertising	X	X		

Source: British Council (2010) Mapping the creative industries: A Toolkit

- Therefore, **even when comparing internationally if different countries are using the same terminology it may not be an accurate comparison**.

What data are required to enable accurate benchmarking?

- Due to the dynamic and diverse nature of the sector, it often does not align well with official statistics measurement frameworks which tend to use Standard International Classification (SIC) codes or Standard Occupational Classification (SOC) codes. Statistical systems of industrial classification struggle to keep pace with the rate of industrial change. They provide the most detailed coverage for traditional areas of the economy, such as primary and extractive industries, and manufacturing. Consequently, in general, the service sector is poorly covered and the classifications are particularly weak for areas in which there is rapid technological and market change; both types of change generate difficulties.

- Accuracy in benchmarking can only be achieved if there is confidence that the data providers have used the same industry definitions and are working from a consistent methodology.
- For a researcher, the best method to ensure accurate comparisons is to build up a database using raw statistics from official sources.
- Using raw data for sector comparisons is usually relatively straightforward, and data can be drawn largely from central sources such as the International Labour Organization (ILO) to enable comparisons of broad sectors such as retail, construction, agriculture, manufacturing etc.
- However, **the creative industries require a much more granular level of data to produce employment and GDP estimates**. For example, the DCMS definition used in the UK is perhaps the most widely used definition of the creative industries. The UK definition requires 4 digit level SIC data to estimate employment (refer to Appendix 1), and for some industries only a portion of very detailed sectors are classified as 'creative'.
- Measuring creative employment is equally difficult (i.e. also including persons employed in creative occupations outside the creative industries sector). UNESCO proposed a global study on measuring employment in the 'cultural industries' in 2011, which faced similar problems of requiring granular data (refer to Appendix 2 for its proposed definition).
- **This level of granularity is difficult to obtain**. Some advanced economies where statistical authorities have large budgets are able to produce data to this level of detail (e.g. UK, US, Australia, EU economies, Canada etc.). However, in most cases developing or emerging markets will not be able to produce data to the required level of detail to enable researchers to estimate the size of the creative industries.
- Many cross-economy business surveys also have insufficient coverage of micro-enterprises and sole traders, which are disproportionately represented in the cultural sector.
- There are two main sources of employment data, 'labour force and household employment surveys' and 'population censuses'. There are both positive and negative aspects to these data (refer to table below).

Table 1.5: Overview of key data types

Data type	Positive	Negative
Labour force and household surveys	- A significant number of countries carry them out - They are done especially for capturing employment phenomena - Many of them have consistent standardized ILO concepts - They are done on a regular basis, monthly or annually in most regions around the world - Disaggregated coding systems	- Small size of their samples in some countries (e.g. sample size is often too small to produce results at granular sectoral level that are statistically significant) - Low levels of occupation and activity classification coding in some countries - Concepts used vary among some countries
Population censuses	- They are done by an overwhelming majority of countries - They have information on employment obtained from their well sized sample surveys - They register both activities and occupations - Some countries carry out inter-census procedures in which estimations projected for the subsequent years can be found	- They are usually done once every ten years - They employ different methodologies and ways of applying samples

- Therefore, even if these data are available, there are considerable barriers such as timeliness and use of consistent methodologies. Our review of data availability highlighted that **very few of the countries in the Americas published data at the level required to make estimates of the economic contribution of the creative industries sector**, as highlighted in Table 1.6 below.

Table 1.6: Review of the availability of employment statistics

	1 Digit	2 Digit	3/4 Digit		1 Digit	2 Digit	3/4 Digit
Antigua & Barbuda	✓	✗	✗	Nicaragua	✓	✗	✗
Argentina	✓	✓	✗	Panama	✓	✗	✗
Bahamas	✓	✗	✗	Paraguay	✓	✗	✗
Barbados	✓	✗	✗	Peru	✗	✗	✗
Belize	✗	✗	✗	St Kitts & Nevis	✓	✗	✗
Bolivia	✓	✗	✗	St Lucia	✗	✗	✗
Brazil	✗	✗	✗	St Vincent and the Grenadines	✗	✗	✗
Canada	✓	✓	✗	Suriname	✗	✗	✗
Chile	✓	✗	✗	Trinidad & Tobago	✗	✗	✗
Colombia	✗	✗	✗	United States	✓	✓	✓
Costa Rica	✓	✓	✗	Uruguay	✗	✗	✗
Dominica	✗	✗	✗	Venezuela	✗	✗	✗
Dominican Rep.	✓	✗	✗	**Benchmark Countries**			
Ecuador	✓	✗	✗	China	✓	✗	✗
El Salvador	✓	✓	✗	Malaysia	✓	✗	✗
Grenada	✗	✗	✗	Italy	✓	✓	✓
Guatemala	✓	✗	✗	Jordan	✓	✗	✗
Guyana	✓	✗	✗	Mauritius	✓	✗	✗
Haiti	✓	✗	✗	Phillippines	✗	✗	✗
Honduras	✓	✗	✗	South Africa	✓	✓	✓
Jamaica	✓	✗	✗	South Korea	✓	✗	✗
Mexico	✓	✓	✗	Spain	✓	✓	✓
				UK	✓	✓	✓

- While there appear to be relatively few countries producing data to 3 and 4 digit levels, it may be possible to access this level of data through special requests and consultation with the relevant national statistical authorities. It is also worth noting that in its proposal for a study to estimate global employment in the cultural industries, UNESCO found very few countries that were producing data to the level of granularity needed (see Appendix 3).
- With regard to GDP data, **even in advanced economies it is often difficult to source GDP data at the required level to estimate the GDP impact of the creative industries**. Some countries run regular business surveys (such as the Annual Business Inquiry in the UK), although it is only in exceptional cases where the data from these surveys is of the required granularity to enable robust estimation of creative industries GDP. It would be highly unlikely that information would be available at the required level of detail on a consistent basis across countries.

- With regard to GDP, the main source of information on the economic impact of the sector is from commissioned research projects aimed at estimating the size of the sector which are available for some of the countries in the Americas. For example:
    - In Brazil the copyright industries were estimated to account for 6.7% of GDP in 1998, compared to 11.1% for the copyright industries in 2006.[11]
    - In the United States, GDP for the copyright industries increased from 4.9% in 2002 to 11.1% in 2011.
    - In Argentina, the creative industries increased their share of national GDP from 2.5% to 3.8% between 2004 and 2011.[12]
- While the GDP estimates above may not be technically comparable due to differing methodologies and definitions used, they do **nonetheless provide an indication of the increasing importance of the creative and cultural sector in terms of GDP contribution in many of the countries across the Americas.**
- **Due to the difficulties in estimating both output and employment, it is best to turn to the availability of other data and other analyses conducted by third party research organisations to provide additional insight into the economic impact of the creative industries.** Using raw data to produce international estimates of creative industries is beyond the remit of this study, and would require a large scale research programme.

[11] Please refer to the country dashboard for Brazil which accompanies this report for further information.
[12] Please refer to the country data files which accompany this report for further information.

Availability of data on the creative industries

Satellite accounts

- Although it is difficult to get data from national accounts at a disaggregated level to estimate creative industries output, some governments have recognised the importance of the sector as a key contributor to economic growth and have commissioned a satellite account. A number of countries in the Americas have produced a satellite account measuring the sector, including Chile and Colombia.
- **The cultural satellite account is an economic information system for cultural products and the activities that create them**. The account has as a frame of reference the United Nation's System of National Accounts. Its main objective is to produce information that will make possible economic analysis and evaluation of cultural activities in the country and to facilitate public and private decision-making in the cultural sector.

The development of satellite accounts in Colombia

In Colombia, the cultural satellite account (CSC) has been developed by the DANE (national statistics office) and the Ministry of Culture from late 2002, with the support of the Convenio Andrés Bello (CAB) and the National Copyright Office at the Ministry of Interior. This concept has been introduced within the financial accounting systems with the goal of "expanding the analytical capacity of national accounts in a flexible manner, without overloading or distorting the central system."

In the CSC system, the cultural sector is "defined in a practical way, based on the guidelines adopted and developed by the economy and culture project of the CAB. This does not only include activities such as arts, folklore or tangible and intangible heritage, but also other activities from which much of the cultural processes flow, such as television, radio, advertising, film or publication of books, magazines and newspapers." This broad spectrum of activities is known as the cultural industries.

The aim of the cultural statistics was:

− to establish the magnitude of cultural activity and compare it with the national economy;

− to come up with instruments that contribute to all decision-making processes, and the definition and evaluation of cultural policies;

− to identify in the main framework the set of cultural activities and implement the measurement mechanisms of the national accounts system;

− to make available to the community (business organizations, creators, academia, etc.) reliable information on cultural activities;

− to achieve an economic measurement of culture that allows international and inter-sectoral comparisons;

− to provide information to identify the strengths and weaknesses of the various cultural activities from their economic dimension;

− to enrich the economic analysis of culture with non-monetary indicators.

- Colombia's cultural satellite account provides information on value added, employment, cultural infrastructure and consumption in the following sub-sectors of the cultural sector:
- Publishing
- Books
- Magazines
- Newspapers
- Audio-visuals
- Movies
- Videos
- Television
- Videogames
- Radio
- Music
- Cultural Areas
- Libraries
- By way of summary the table below provides GDP in the cultural sector in Colombia at a broad sub-sector level:

Table 1.7: Value added in cultural industries in Colombia 2001 and 2007 (millions of pesos, current prices)

Sector	2001	2007
Publishing and printing	649,659	1,227,984
Radio, television and cable program transmission	176,640	384,523
Advertising, photography and research and development	941,210	2,674,860
Recreational activities, cultural and recreational services	1,334,863	2,909,772
Museums	16,998	40,128
Artistic education	99,686	156,525
Government	179,636	288,893
Total cultural industries	3,433,692	7,680,724
% of total GDP	1.6%	1.8%

Source: Departamento Administrativo Nacional de Estadistica (DANE)

- The data illustrate that the scale of the cultural sector in Colombia has more than doubled in size[13] over the six year time period for which data are available. The sector has only marginally increased its share of total GDP as the economy as a whole has experienced strong growth over the period in question.
- **Although there are some other countries that have produced cultural satellite accounts, international comparisons can still be problematic**. For example, in the cultural satellite account of Spain, one of the benchmark countries in this study, a slightly different set of sub-sectors[14] is used making comparisons at detailed levels difficult. Therefore, although in Spain the cultural sector is recorded in its satellite account in 2007 as representing 2.9% of GDP, this is not directly comparable to the 1.8% figure recorded in Colombia due to the slightly different definitions of the cultural sector that have been used.
- **The development of cultural accounts is an extremely positive recent development in the statistical measurement of the sector.** Argentina, Colombia, Chile and Canada[15] already produce cultural satellite accounts. Brazil, Costa Rica, the United States and Uruguay have made advanced progress towards the development of a cultural satellite accounts, and Bolivia, Ecuador and Peru are currently in the initial stages of developing a cultural satellite account.

[13] In current prices.

[14] Heritage; Archives and Libraries; Books and Press; Visual Arts; Performing Arts; Audio-visuals and Multimedia; and Interdisciplinary.

[15] Canada does not technically produce a cultural account, however it does have the most complete cultural statistical framework in the hemisphere and, arguably, the world.

The expansion in the number of countries producing satellite accounts is hugely important and will provide enhanced market intelligence on the evolution of the sector, highlight growth markets within the sector and be an informative tool for governments to draw upon to enable evidence based policy making for the creative and cultural industries.

- It should be noted that governments should not undertake the development of their satellite accounts in isolation, and **the development of satellite accounts should be undertaken in partnership with other countries in the region** and international organizations working in this field to ensure that the accounts are produced using the same methodology and definition of the sector to enable accurate comparisons among countries.

Trade information

- **Other than satellite accounts, trade information is the best source of statistics from a central source relating to the creative industries.**[16] UNCTAD provides detailed estimates of imports and exports for most countries across the globe. As this comes from a central source using the same methodology all data are directly comparable.
- The available statistics highlight some interesting trends for the global creative industries:
    - $646 billion of exports (in 2011), growing at an average annual rate of 10.8 per cent between 2002 and 2011;
    - 2.5% of world export of goods (in 2011); and
    - 34.4% of world export of services (in 2011).
- The countries in the Americas account for $87 billion of world creative exports, approximately 14% of global creative exports.
- Creative exports (goods and services) from the countries in the Americas account for 2.2% of all their exports of goods and services. Their creative goods exports account for approximately 1.6% of all the goods exports from the Americas, and their creative services exports account for 4.6% of all their services exports. Creative exports from the countries in the Americas are comprised of 56% creative goods and 44% creative services (refer to table below).

[16] Although it is one of the best sources of data with regard to the creative industries, the trade information does have some gaps where trade in particular goods or services is of a small volume; the measurement of trade in services is difficult and methods to improve data measurement of intangibles are constantly being reviewed.

Table 1.8: Exports from countries in the Americas of all creative industries (goods and services), by subgroup, 2002, 2008 and 2011

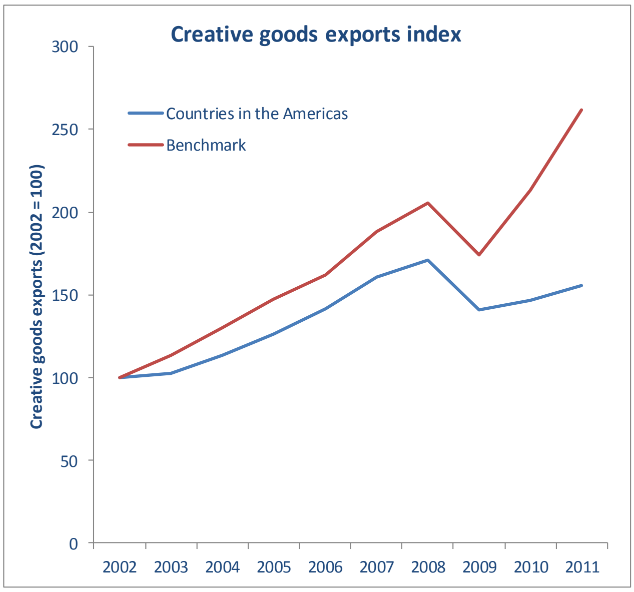
	2002			2008			2011		
	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports
ALL CREATIVE INDUSTRIES	**49706**	**100%**	**2.9%**	**87860**	**100%**	**2.6%**	**87600**	**100%**	**2.2%**
ALL CREATIVE GOODS	**31796**	**64%**	**2.4%**	**54261**	**62%**	**2.0%**	**49453**	**56%**	**1.6%**
Arts crafts goods	2111	4%	0.2%	2447	3%	0.1%	2055	2%	0.1%
Visual arts goods	3404	7%	0.3%	9337	11%	0.3%	8218	9%	0.3%
Performing arts goods	648	1%	0.0%	-	-	-	-	-	-
Publishing goods	9421	19%	0.7%	11331	13%	0.4%	9412	11%	0.3%
Audiovisual goods	209	0%	0.0%	394	0%	0.0%	271	0%	0.0%
Design goods	12676	26%	1.0%	20725	24%	0.8%	21724	25%	0.7%
New media goods	3327	7%	0.3%	10027	11%	0.4%	7772	9%	0.3%
ALL CREATIVE SERVICES	**17909**	**36%**	**4.7%**	**33600**	**38%**	**4.6%**	**38147**	**44%**	**4.6%**
Advertising and related services	512	1%	0.1%	1466	2%	0.2%	2021	2%	0.2%
Architecture and related services	4297	9%	1.1%	11029	13%	1.5%	12760	15%	1.5%
Research and development services	1641	3%	0.4%	4031	5%	0.6%	5180	6%	0.6%
Personal, cultural and recreational services	11459	23%	3.0%	17073	19%	2.3%	18186	21%	2.2%

Source: UNCTAD, Oxford Economics

Note: Creative goods are expressed as a % of total goods exports, creative services are expressed as a % of total services exports and total creative industries are expressed as a % of all exports of goods and services

- Creative exports in the countries in the Americas have grown by 6.5% per annum between 2002-11. This is slower than the growth achieved by the benchmark group[17] of countries, which, driven by China, has grown at 11.3% per annum.

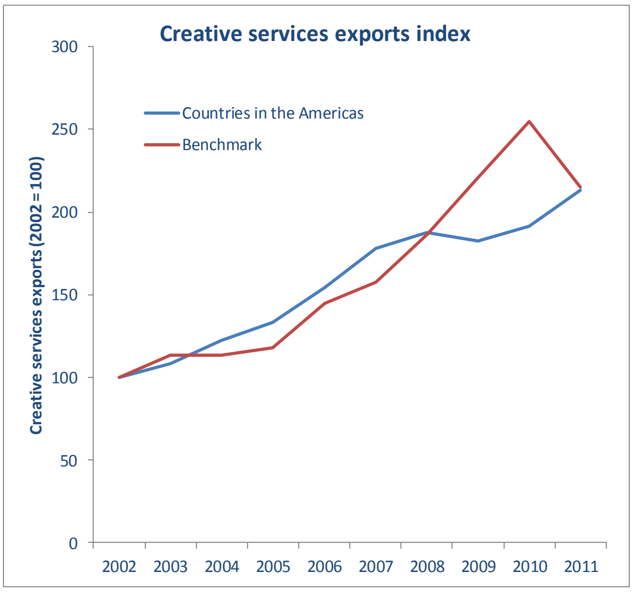
Figure 1.9: Creative goods exports index (2002=100)



Source: UNCTAD

[17] The benchmark group of countries are comprised of China, Italy, Jordan, Malaysia, Mauritius, the Philippines, South Africa, South Korea, Spain, and the United Kingdom.

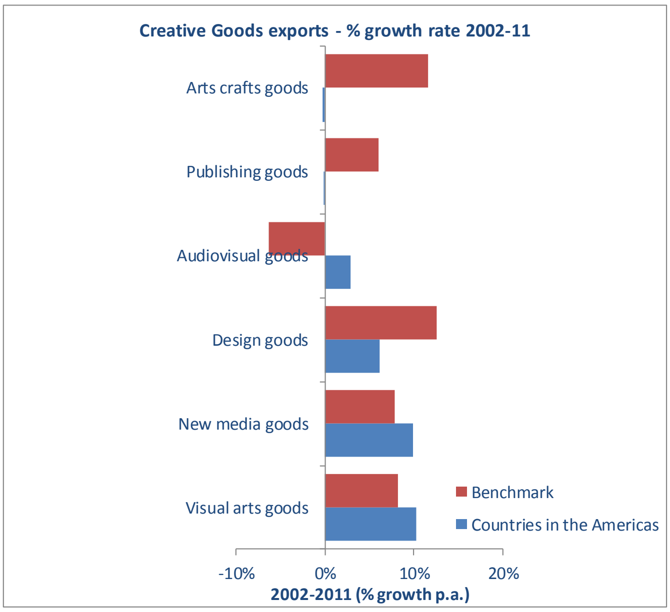
Figure 1.10: Creative services exports index (2002=100)



Source: UNCTAD

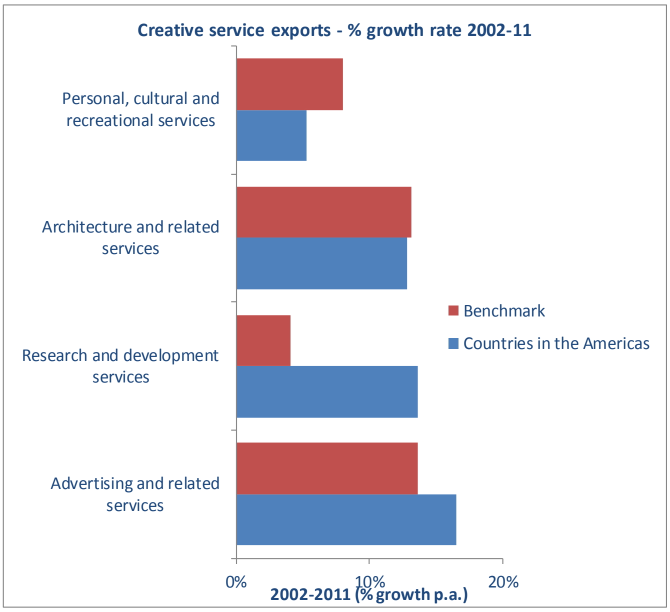
- Growth in the countries in the Americas has been fast in new media and visual arts goods, and has achieved double digit per annum growth in architecture and related services, research and development services, and advertising and related services, over the 2002-11 time period for which data is available.

Figure 1.11: Creative goods exports growth rate (2002-2011)



Source: UNCTAD

Figure 1.12: Creative services exports growth rate (2002-2011)



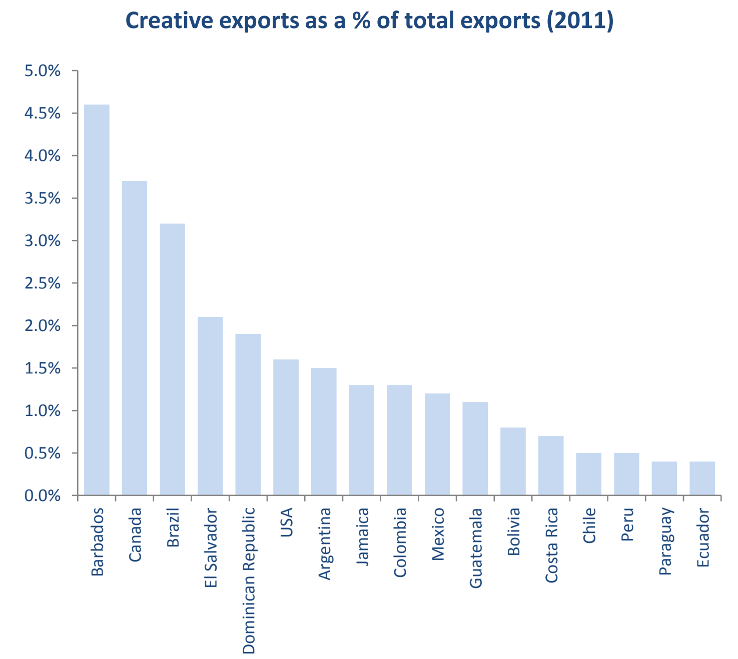
Source: UNCTAD

Data from other central providers

- The UNCTAD data provide more granular information than has been presented in this report (e.g. design can be split out by architecture, fashion, glass wear, interiors, jewellery, and toys; new media can be split into recorded media and video games; and visual arts can be split into antiques, paintings, photography and sculpture).[18]
- **The data are also available on a country by country basis, and can also provide analysis of bi-lateral creative trade flows**. The chart below ranks the countries in the Americas for which data are available, highlighting that Barbados and Canada have the greatest creative export intensity while countries such as Paraguay and Ecuador rank towards the lower end of the scale. The important point from this is that each country in the region is at a different level in the development of its creative industries sector, highlighting that some countries which currently have a small creative sector have potential for growth of the sector to catch up with leading countries.

[18] Please refer to the country data files which accompany this report for further information.

Figure 1.13: Creative exports as a % of total exports (2011)



Source: UNCTAD
Note: 2010 data is used where 2011 data has not yet been published

- The UNCTAD creative goods and services databank is a very useful resource to provide insight into trade in the creative industries.

Other data providers

- There are other data providers that provide specialist information with regard to the creative industries ranging from **economic studies to the statistics included in cultural yearbooks**.

WIPO

- Through its **creative mapping research programme, WIPO seeks to quantify the economic contribution of the copyright-based industries to value added output (GDP), foreign trade (exports and imports) and employment**.
- WIPO's definition of the 'copyright industries' is based on 4 digit ISIC data, and sourced from labour force surveys, household surveys, business surveys, trade records and company accounts. Using data at this level and estimating outputs represents a hugely ambitious and large scale research programme.
- A number of the countries included in the WIPO research programme are among the countries in the Americas and benchmark countries included in this study. A summary of the results for all countries is included in Appendix 5 of this report.

- The charts below summarise the economic contribution of the copyright industries for the countries in the Americas and the benchmark countries for which data is available.

Figure 1.14: GDP impact of copyright industries

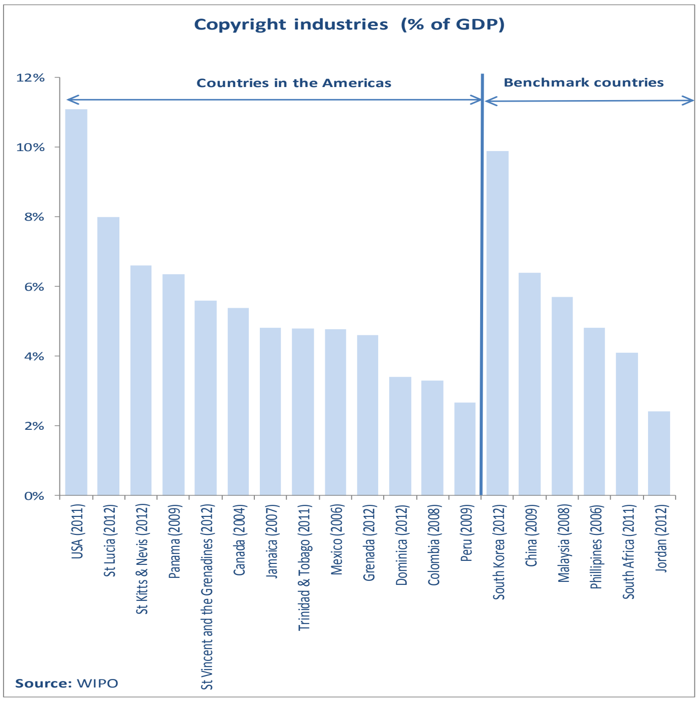
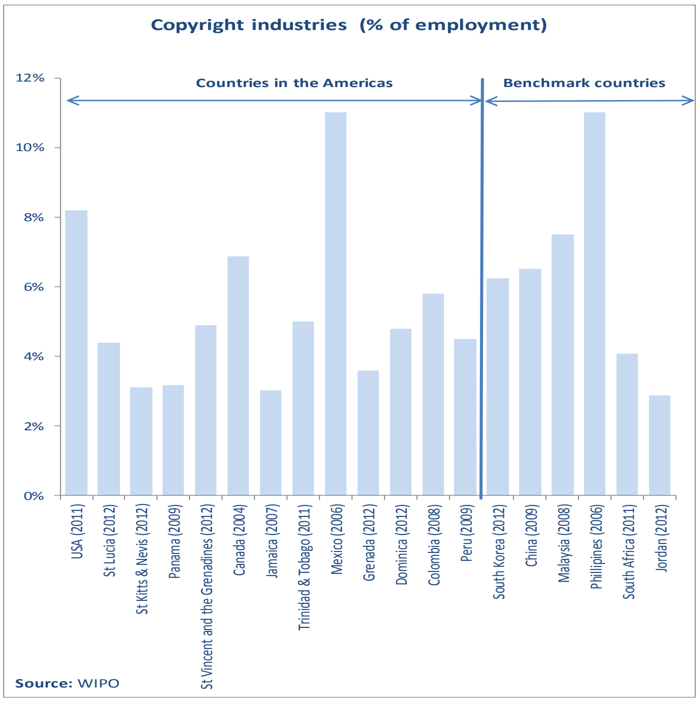


Figure 1.15: Employment impact of copyright industries

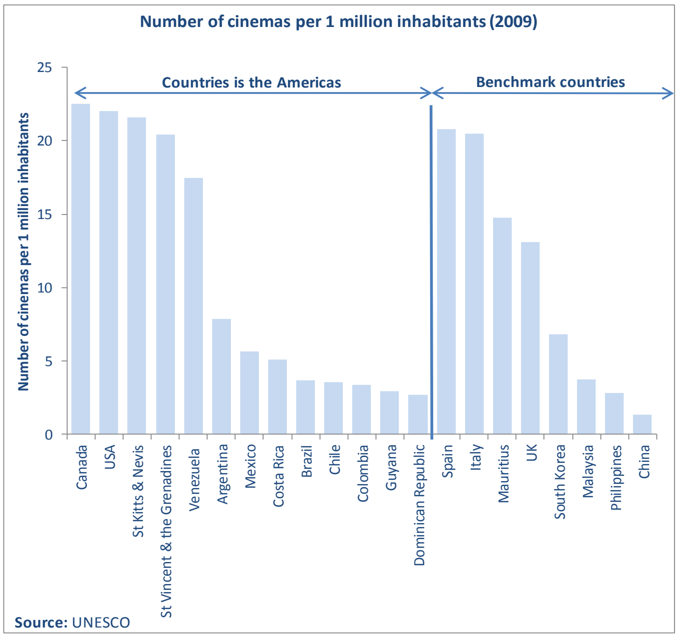


- Of the countries in the Americas, the copyright industries account for the largest proportion of GDP in the United States, and the greatest proportion of employment in Mexico.
- It is worth highlighting that in the USA the copyright industries account for 11.10% of GDP and only 8.19% of employment, whereas in Mexico the copyright industries account for 4.77% of GDP and 11.01% of employment. This highlights the higher value added activity in the USA in the copyright industries relative to Mexico, where productivity in the United States is much higher.

UNESCO

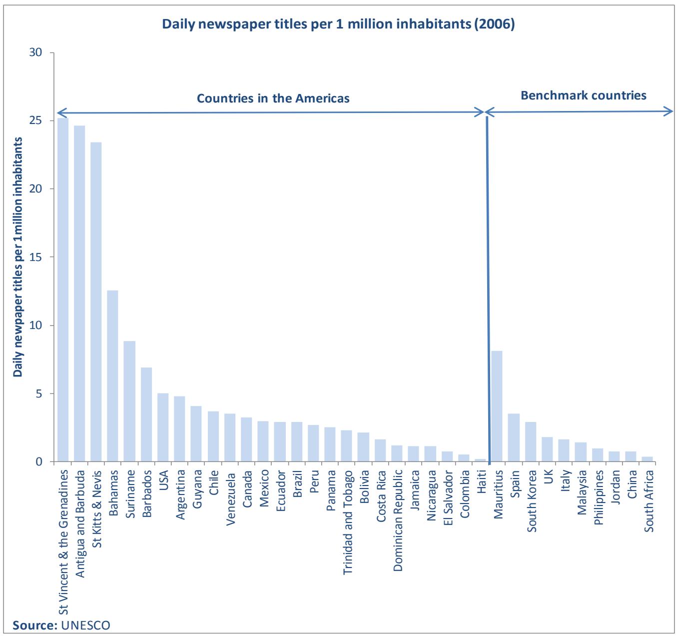
- **UNESCO publishes a range of statistics relating to the creative industries, largely relating to film and TV and media**. The charts below highlight two of the main data variables available through UNESCO's statistical database, illustrating number of cinemas and number of daily newspaper titles.

Figure 1.16: Number of cinemas per 1 million inhabitants (2009)



Source: UNESCO

Figure 1.17: Daily newspaper titles per 1 million inhabitants (2006)



- Canada and the United States have the most cinemas per 1 million inhabitants, whereas smaller island economies tend to record the largest number of daily newspaper titles per 1 million inhabitants (attributable to their small population size). **UNESCO's data coverage across the countries in the Americas is very good, although there do remain some data gaps where information is unavailable.**

Market research organisations

- **Data is available from some private sector providers; this data is often of a high quality although country coverage can be sketchy as private providers will only produce data for countries where it is commercially viable for them to do so**. Therefore data tend to be available mostly for the larger economies and not published for many of the smaller states in the Americas.
- The charts below highlight some data that are available via private providers, illustrating spending on video games per capita and advertising spending per capita.

Figure 1.18: Video game spending per capita (US$)

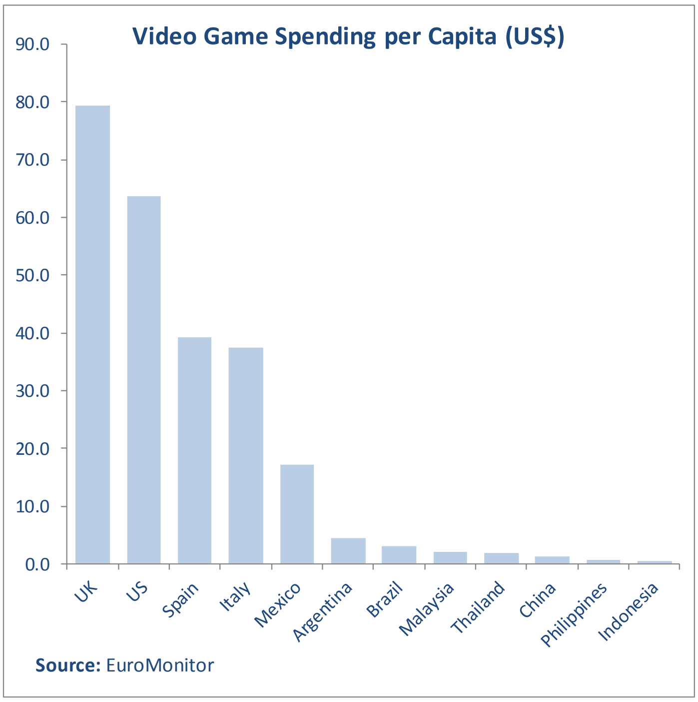
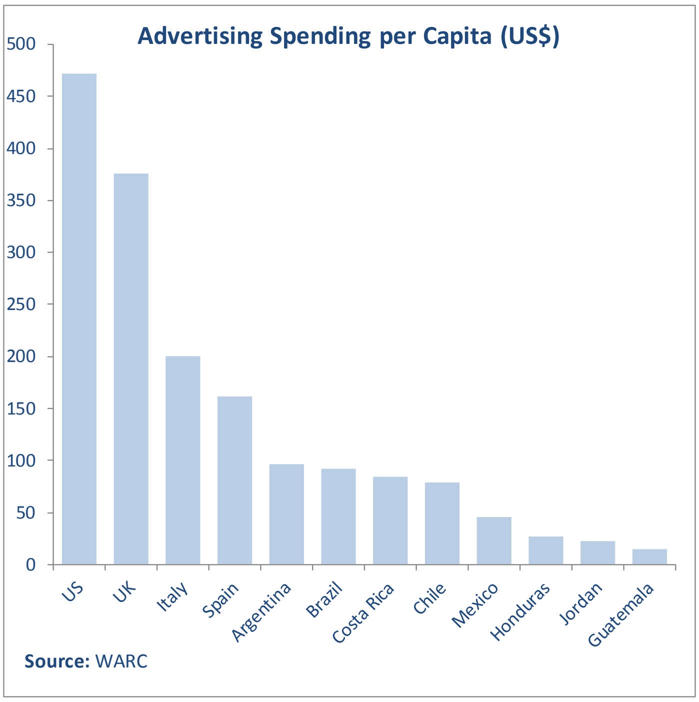


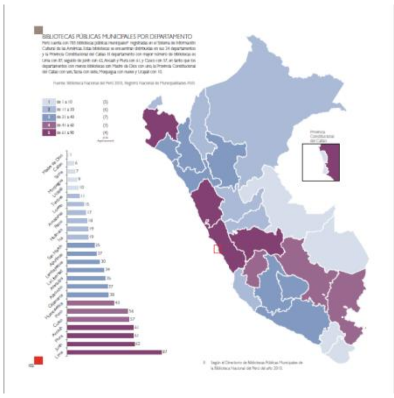
Figure 1.19: Advertising spending per capita (US$)



Data available from national sources

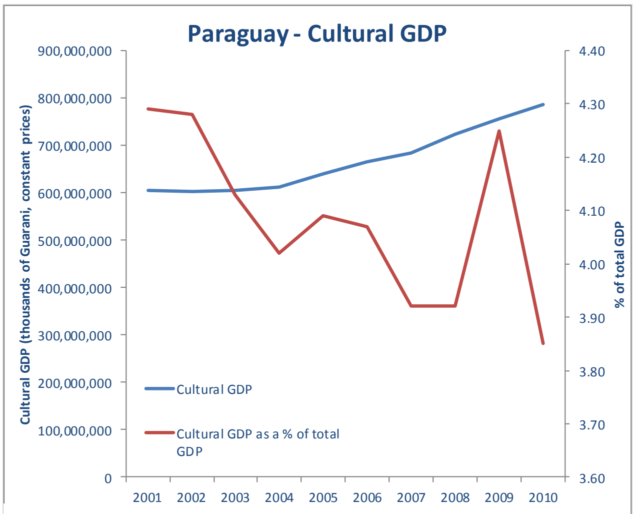
- Government bodies and national statistical agencies in some countries in the Americas produce *ad hoc* statistics relating to the cultural industries.

- **Cultural atlases:** Inspired by the French pioneering experience, Mexico and Argentina developed their own atlases of cultural heritage and infrastructure--the first ones in the region. Based on these, the IDB Cultural Center established the SICLA (Spanish acronym for the System of Cultural Information of the Americas), a data gathering initiative, which is compiling detailed regional statistics on the cultural infrastructure of each country. The first set of SICLA atlases were published in 2012, and included Costa Rica, Ecuador, Jamaica, and Peru. The final set of atlases for 26 countries in Latin America and the Caribbean[19] is expected to be completed in 2014.



- **Cultural yearbooks:** Other countries such as Brazil publish cultural yearbooks which hold data on a wide range of cultural consumption and cultural production variables. Some government departments include a dedicated 'culture section' in their statistics websites (e.g. Canada) that provide similar information as in cultural yearbooks.
- **Economic impact studies:** A number of governments have commissioned studies to estimate the economic impact or sector footprint of the creative industries. For example, Paraguay annually publishes estimates for cultural GDP. This is important information, although care must be taken if comparing the estimates internationally as other countries will perhaps use a different sector definition and a different methodology in producing similar estimates. Some countries in the region have also carried out research on value chains in specific subsectors (publishing, music, festivals, film, video games, among others).

Figure 1.20: GDP impact of cultural industries in Paraguay (2001-2010)



Source: SCIPY

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19 These 26 countries are the borrowing members of the IDB.

- **Industry associations:** Often certain industries will collect information relating to their sector to monitor sales and gauge the health of the sector. For example, the International Federation of the Phonographic Industry annually publishes a document titled *'the Recording Industry in Numbers'* which provides detailed sales information for the music sector. The table opposite summarises total recorded music sales in the countries in the Americas and benchmark countries for which data is available, highlighting that the United States, Brazil and Mexico are the largest markets for music amongst the countries in the Americas.

Table 1.21: Recorded music sales by country

Country	Recorded music sales $millions
United States	4632.5
Brazil	203.7
Mexico	120.9
Argentina	52.7
Venezuela	23.7
Colombia	21.0
Chile	14.4
Barbados	9.0
Costa Rica	9.0
Dominican Republic	9.0
El Salvador	9.0
Guatemala	9.0
Jamaica	9.0
Uruguay	4.1
Peru	2.6
Ecuador	1.7
Panama	0.5
UK	1573.8
Canada	395.9
Italy	252.0
Spain	245.9
South Korea	144.8
South Africa	115.8
China	74.9
Philippines	17.6

Source: Recording Industry in Numbers, 2010

- **Other centralised sources:** Often information can be published by a third party organisation in a regular publication or book. For example, the number of libraries across countries is published by International Federation of Library Associations and Institutions in their yearbook, and the number of museums is published in the museums of the world handbook published by De Gruyter Saur. The table opposite lists the number of museums by country, indicating that Mexico and Brazil have the largest number of museums among the countries in the Americas.

Table 1.22: Number of museums by country

	Number of Museums
United States	14440
Italy	3187
UK	2873
Canada	2114
China	1001
Mexico	913
Brazil	659
Argentina	573
Cuba	338
Colombia	270
South Africa	231
Peru	227
Philippines	196
South Korea	183
Indonesia	164
Ecuador	96
Venezuela	85
Uruguay	61
Bolivia	51
Chile	49
Dominican Republic	40
Nicaragua	37
Jordan	29
Panama	21
Jamaica	20
Costa Rica	19
Paraguay	17
El Salvador	12
Mauritius	11
Bahamas	10
Belize	10
Honduras	9
Barbados	7
Haiti	6
Suriname	3
St Lucia	2
Grenada	1
Guyana	1
Trinidad and Tobago	1

Source: Museums of the World, 18th Edition

Conclusions and recommendations

Key points

- The growing importance of the creative industries is illustrated through trade statistics, highlighting that global creative exports have grown by over 10% per annum for much of the past decade. **The countries in the Americas accounted for approximately $87 billion of world creative exports in 2011, approximately 14% of the world total.**[20]
- **Creative exports in the Americas accounted for 2.2% of all their exports in 2011. This is comprised of approximately 1.6% of all goods exports and 4.6% of all services exports.** The most important sectors in the goods market for the region are design goods and publishing goods which account for 25% and 11% respectively of creative exports from countries in the Americas. The most important sectors in the service sector are ‘personal, cultural and recreational services’ and ‘architecture and related services’ which account for 21% and 15% respectively of creative exports by countries in the region.
- **It is worth highlighting that according to UNCTAD, the Americas account for almost two-fifths of global ‘personal, cultural and recreational services’ (which includes audio-visual services) exports and over one quarter of global ‘visual arts’ exports illustrating the position of the Americas as a world leader.**
- Creative services have been the driver of creative exports growth since 2008, increasing by 4.3% per annum since the global recession began in 2008. **Established creative service sectors such as ‘architecture and related services’ and ‘personal, cultural and recreational services’ have continued to grow throughout the recession recording positive export growth between 2008-11.**
- Other smaller tradable creative industries such as ‘**advertising and related services’, which account for only around 2% of creative industries exports but grew at over 10% per annum between 2008-11 highlighting potential for further growth.**
- Many countries have elaborate statistics on the creative sector but economic aspects are usually not at the core. For example, **in our data collection we have been able to find more data relating to creative infrastructure (e.g. number of museums, libraries, publishers etc.) than hard economic statistics relating to output and employment.**
- The studies on the economic aspects have typically been carried out by research institutes, not national statistical bodies. They have used varying terminology such as creative industries, copyright industries or cultural industries. **Comparisons among the studies are difficult due to differing methodologies and/or scope. A more active role of multilateral bodies and other international organizations is key in bridging these gaps, and help different positions to reach a compromise.**
- Despite the limited data available and lack of comparable indicators, the creative industries are showing significant promise, with data highlighting that the sector is accounting for a growing share of national GDP in countries such as Argentina, Brazil, Colombia, Paraguay, and the United

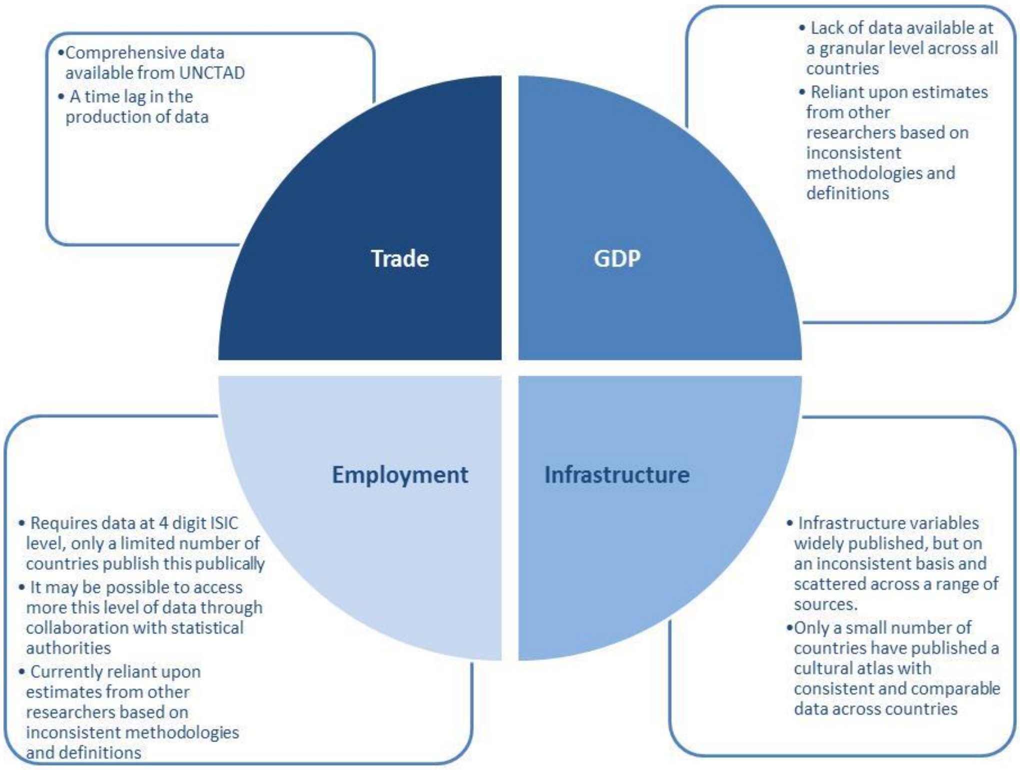
[20] *See* pp. 20-21 of this report.

States.[21] In some countries the sector is clearly established and accounts for a sizable share of GDP and/or employment. However, there are still some countries such as Peru[22] which account for a small proportion of employment, GDP and trade that have an underdeveloped creative industries sector which highlights the potential for growth and development. When considered as a region there is still further potential for growth, with creative trade representing approximately 2.2% of total exports compared to 2.9% at world level and 4.3% in the benchmark countries illustrating further potential for the development of the sector. Other creative consumption and infrastructure variables such as increasing numbers of theatres and cinemas, and rising numbers of software and digital content professionals in addition to soaring consumption pattern for video games, advertising and films provide a positive context for future development.

- During a period where global economic growth is particularly weak, it is important for governments across the globe to actively promote sectors with growth potential, and the potential to create employment. As a result of the global financial crisis global youth unemployment has soared. Data from the OECD suggests that 26m 15-24 year olds in developed countries are not in employment education or training. The International Labour Organization reports that 75m people globally are looking for a job and World Bank surveys suggest that 262m young people in emerging markets are economically inactive. Depending on how you measure them, the number of people without a job is nearly as large as the population of the United States (311m). **The creative industries tends to have both a younger age profile and a higher degree of self-employment relative to other sectors, and growth in the sector can help to provide job opportunities for young people**. The industry is often wrongly associated with 'lower value added' activity, in other words low productivity jobs. This myth is no longer true, and **the sector is home to a number of high value occupations in film and TV, digital content, advertising executives and architects, growth in these sectors can help contribute to productivity growth**.
- Given its growing economic importance, **there is an evident lack of knowledge base on the economic impact of the creative industries both nationally and internationally.** A strong evidence base is required that can be used to argue in favour of measures intended to strengthen the economic basis of creative production and to implement policies or initiatives that would help to encourage their growth.

[21] Please refer to the country dashboards for Brazil and Colombia which accompany this report for further information.
[22] Please refer to the country dashboard for Peru which accompanies this report for further information.

Figure 1.23: Creative industries data availability overview



- This study has found that while there are useful snapshots of information scattered across various sources, **it remains difficult to gain a comprehensive picture of the creative industries across the entire region or even sub-regions** (e.g. the Caribbean, Central America, North America, and South America).

Measurement considerations

- In order to devise a robust system to measure the economic impact of the creative industries in countries in the Americas a number of aspects must be considered:
- **Agreed definition of the sector across countries:** One of the most important requirements is that states work from a common definition. Across countries there are too many different terminologies and varying definitions being used relating to the creative industries to enable accurate international comparisons and to assess the economic contribution of the sector across the Americas as a whole. The work that WIPO has done is a good example of a large scale research programme working from a common definition with a uniform methodology across countries.
- **Regular publication of detailed statistics:** Trade indicators have highlighted that the creative industries are growing rapidly. Trade in creative goods and services has been growing at over 10% per annum over much of the past decade. With this rapid growth, and a dynamic sector

such as the creative industries that is constantly evolving and developing new markets it is important to regularly measure and monitor the evolution of the sector by conducting regular studies / surveys. One off research studies are useful, but can quickly become outdated.

- **Publishing infrastructure data on a consistent basis:** There is a plentiful supply of data relating to the infrastructure of the creative industries. However it is often published across a range of sources in sections of statistical websites. Based on the experiences of Argentina and Mexico in producing atlases, the IDB Cultural Center supported similar efforts by Costa Rica, Ecuador, Jamaica, and Peru. All these experiences served as the springboard for the SICLA, which will house the atlases of 26 countries in a central location.[23] The atlases follow a common methodology, thus enabling cross-national analysis. This initiative is a strong example of South-South cooperation and should be completed in 2014.
- **Overcoming data gaps:** Generally, cultural activities can be accurately identified within statistical industrial classification systems only at the greatest level of disaggregation (four- or five-digit classes). This creates difficulties, as data provided by national statistical offices from sources for many variables (e.g. GDP) are often only available for industry sectors at a higher level of aggregation, typically in the two- or three-digit class. One approach is that national statistics agencies commit resources to conducting business surveys to collect enough information to produce data at the required level of granularity to estimate creative industries output and employment.
- **Leveraging existing sources:** As we have highlighted in this report there are a number of useful data providers publishing information relating to the creative industries, but with limited country coverage of the smaller states in the region. There is an opportunity to open dialogue with existing data providers to scope the potential for additional countries to be added to improve their data coverage. For example, a private sector data provider may be persuaded to include additional countries as part of its service if a statistical authority were to offer to work collaboratively with it or provide financial resources to fund the research necessary to include additional countries.
- **Common approach to accounting frameworks:** Existing data collection instruments can be used to collect data relating to the creative industries. These data collection instruments consist of existing international classification systems, which will allow for the production and analysis of internationally comparable data for creative industries. Most of these international classifications provide a comprehensive framework within which economic data can be collected and reported in a format that is designed for the purposes of economic analysis, decision taking and policy-making. Data can be collected from business and enterprise surveys, household expenditure surveys, business registers, earnings surveys, labour force surveys and censuses. While these data collection instruments may not have been designed specifically for the collection of information relating to the creative industries, they nonetheless can allow for an analysis of selected creative activities. If the information from these research instruments are published using International Standard Industrial Classifications (ISIC) or International Standard Classification of Occupations (ISCO) at a high level of disaggregation they can be mapped to the creative industries. UNESCO has published a framework for cultural statistics using detailed ISIC and ISCO codes. This framework, or an amended version that better matches

[23] Please refer to http://www.sicla.org/ for further information on the cultural atlases.

the structure of the creative industries in the countries in the Americas, could potentially be employed as a common framework across the region.

- **Consideration of the publication of satellite accounts:** Another widely used economic model is the System of National Accounts (SNA). It uses the Classifications of Expenditure According to Purpose Classifications of the Functions of Government (COFOG), the Classification of Individual Consumption according to Purpose (COICOP), and the Classification of the Purposes of Non-Profit Institutions Serving Households (COPNI). In its Framework for Cultural Statistics UNESCO lists the relevant codes under each of these classification systems that relate to the cultural sector. However, UNESCO notes that evaluating culture only with SNA data would result in an underestimation of the contribution of culture in the economy. This is one of the reasons why several countries such as Chile and Colombia, have started to develop cultural satellite accounts. For example, the CAB, working in Colombia and several other Latin American countries developed a methodology for the implementation of a cultural satellite account.[24] The satellite account framework developed by CAB helps to assess the economic contribution of cultural industries and activities to GDP. This approach has the benefit of allowing for a clearer financial assessment of culture through accounting methodologies consistent with national accounts and are therefore internationally comparable if using the same sectoral definition**. In our view, the best method for measuring the economic impact of the creative industries would be for all the countries in the Americas to commit to producing satellite accounts based upon a methodology agreed upon by all countries**. The satellite accounts focus solely on economic impact, therefore from the perspective of accurately measuring the economic impact of the sector they represent the most appropriate methodology. The UNESCO framework can serve as a conceptual model for the development of national satellite accounts by encouraging the use of specific classifications, in particular, ISIC and ISCO, through using UNESCO's identified industry and occupation codes.
- **Ensuring stakeholder buy-in:** What is perhaps the most important aspect of producing creative industries estimates for the region is ensuring that countries are in agreement to measure the sector in a common way. To accurately measure the sector may involve governments commissioning additional surveys or changing an approach that has been used in the past to measure sectors. As this will involve change and action on the part of the countries in the Americas it is important that each is appropriately engaged in the process and is ready to rise to the challenge.

[24] Please refer to www.convenioandresbello.org/ for further information on the CAB methodology.

Appendix 1: DCMS creative industries definition

Table A.1: DCMS Creative industries definition

Sub sector	SIC code	Description	2009	2010
Advertising	73.11	Advertising agencies	100%	100%
	73.12	Media representation	100%	100%
Architecture	71.11	Architectural activities	100%	100%
	74.10	Specialised design activities	4.5%	4.5%
Arts and antiques	47.78/1	Retail sale in commercial galleries	3.0%	3.1%
	47.79/1	Retail sale of antiques including antique books, in stores	26.9%	27.2%
Crafts	Majority of businesses too small to be picked up in business surveys			
Design	74.10	Specialised design activities	89.7%	89.7%
Designer fashion	10 codes	Clothing manufacture	0.5%	0.5%
	74.10	Specialised design activities	5.8%	5.8%
Video, Film & Photography	18.20/2	Reproduction of video recording	7.3%	7.7%
	74.20	Photographic activities	25%	25%
	59.11/1 & 59.13/2	Motion picture and video production activities	37.8%	33.8%
	59.12	Motion picture, video & TV post-production activities	37.8%	33.8%
	59.13/1 & 59.13/2	Motion picture and video distribution activities	98.8%	98.8%
	59.14	Motion picture projection activities	100%	100%
Music and the Visual & Performing Arts	59.20	Sound recording and music publishing activities	100%	100%
	18.20/1	Reproduction of sound recording	14.7%	14.4%
	90.01	Performing arts	100%	100%
	90.02	Support activities to performing arts	100%	100%
	90.03	Artistic creation	100%	100%
	90.04	Operation of arts facilities	100%	100%
	78.10/1	Motion picture, television and other theatrical casting	100%	100%
Publishing	18.11	Printing of newspapers	100%	100%
	18.13	Pre-press and pre-media services	100%	100%
	58.11	Book publishing	100%	100%
	58.13	Publishing of newspapers	100%	100%
	58.14	Publishing of journals and periodicals	100%	100%
	58.19	Other publishing activities	50%	50%
	63.91	News agency activities	100%	100%
Software/ Electronic Publishing	18.20/3	Reproduction of computer media	3.0%	2.9%
	58.29	Other software publishing	100%	100%
Digital & Entertainment Media	58.21	Publishing of computer games	100%	100%
	62.01/01	Ready-made interactive leisure and entertainment software development	5.0%	2.3%
Radio & TV	60.10	Radio broadcasting	100%	100%
	60.20	Television programming and broadcasting activities	100%	100%
	59.11/3	TV programme production activities	62.2%	66.2%
	59.12	Motion picture, video & TV post-production activities	62.2%	66.2%
	59.13/3	TV programme distribution activities	1.2%	1.2%

Note: The percentages in this table refer to the ‘proportion applied’ to each SIC group. That is, in certain sectors the SIC codes do not map directly to the Creative Industries. This is generally due to either the SIC code capturing non-creative elements (e.g. designer fashion SIC codes includes the manufacture of the clothes) or where elements of other non-creative industries are captured by the code (e.g. photographic activities SIC codes include elements such as ‘passport photos’). Proportions are applied to the SIC group so that only the creative elements are included.

Appendix 2: UNESCO cultural industries proposal definition

Table A.2: UNESCO cultural industries proposal definition

ISCO-08 code	Occupation class
2161	Building architects
2162	Landscape architects
2163	Product and garment designers
2164	Town and traffic planners
2166	Graphic and multimedia designers
2354	Other music teachers
2355	Other arts teachers
2431	Advertising and marketing professionals
2513	Web and multimedia developers
2621	Archivists and curators
2622	Librarians and related information professionals
2632	Sociologists, anthropologists and related professions
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 radios, television and other media
2657	Creative and performing artists not elsewhere classified
3118	Draughtspersons
3431	Photographers
3432	Interior designers and decorators
3433	Gallery, museum and library technician
3435	Other artistic and cultural associate professionals
4411	Library clerks
7312	Musical instrument makers and tuners
7313	Jewellery 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 woo, basketry and related materials
7318	Handicraft workers in textile, leather &related materials
7319	Handicraft workers not elsewhere classified
7531	Tailors, dressmakers, furriers and hatters
1113	Traditional chiefs and heads of village
2353	Other language teachers
2636	Religious professionals
3230	Traditional and complementary medicine associate professionals

ISIC Rev.4 code	Activity class
3220	Manufacture of music instruments
4761	Retail sale of books, newspapers and stationary in specialized stores
4762	Retail sale of music and video recordings in specialized stores
5811	Book publishing
5813	Publishing of newspapers, journals and periodicals
5819	Other publishing activities
5911	Motion picture, video and television programme production activities
5912	Motion picture, video and television programme post-production activities
5913	Motion picture video and television programme distribution activities
5914	Motion picture projection activities
5920	Sound recording and music publishing activities
6010	Radio broadcasting
6020	Television programming and broadcasting activities
6391	News agency activities
7110	Architectural and engineering activities and related technical consultancy
7220	Research and experimental development on social sciences and humanities
7310	Advertising
7410	Specialized design activities
7420	Photographic activities
7720	Renting of video tapes and disks
9000	Creative, arts and entertainment activities
9102	Museums activities and operation of historical sites and buildings
9103	Botanical and zoological gardens and nature reserves activities
8542	Cultural education
9101	Library and archives activities

Appendix 3: UNESCO review of labor force surveys

Table A.3.1: UNESCO review of labor force surveys – industrial activity classifications

Country	Industrial activity classification used in labor force surveys		
	Classification	Codes	Linkage
Brazil	National ISIC adaptation	169	ISIC Rev.2.
Canada	NAICS	312.	ISIC- Rev.3. (indirect)
Colombia	National ISIC adaptation	444	ISIC- Rev.3.
Jamaica	National classification classification	9	ISIC-Rev.2.
Jordan	National ISIC adaptation	No information	ISIC-Rev.3 3-digit level
Mexico	National ISIC adaptation	390	ISIC Rev.3
South Korea	KSIC	No information	ISIC-Rev.3 2nd digit level
South Africa	National ISIC adaptation	190.	ISIC-Rev.3
United Kingdom	SIC92.	458.	ISIC-Rev. 3 at the 4-digit level;
USA	US Census Bureau's Industrial Classification System.	236	ISIC-Rev.2. (indirect) NAICS

Table A.3.2: UNESCO review of labor force surveys – occupational classifications

Country	Occupation Classifications used in LFS		
	Classification	Codes	Linkage
Brazil	National ISCO adaptation	381	ISCO-1968
Canada	SOC-91	514	ISCO-88. (indirect)
Colombia	National ISCO adaptation	No information	ISCO-68 2- digits
Jamaica	National classification	9	ISCO-88 Partially linked
Jordan	National ISCO adaptation	No information	ISCO-88. 3-digit level.
Mexico	CMO	465	ISCO-88
South Korea	KSOC	No information	ISCO-88 2nd digit level
South Africa	National ISCO adaptation	369	ISCO-88.
United Kingdom	SOC	374	In process: harmonization with ISCO
USA	OCS	501	ISCO-1968 Indirect

Appendix 4: Global creative trade

Table A.4.1: World exports of all creative industry (goods and services), by subgroup, 2002, 2008 and 2011

	2002			2008			2011		
	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports
ALL CREATIVE INDUSTRIES	**262018**	**100%**	**3.3%**	**589595**	**100%**	**3.0%**	**646096**	**100%**	**2.9%**
ALL CREATIVE GOODS	**198240**	**76%**	**3.1%**	**408731**	**69%**	**2.6%**	**453910**	**70%**	**2.5%**
Arts crafts goods	17503	7%	0.3%	32498	6%	0.2%	34209	5%	0.2%
Visual arts goods	15421	6%	0.2%	29731	5%	0.2%	31127	5%	0.2%
Performing arts goods	2754	1%	0.0%	-	-	-	-	-	-
Publishing goods	29908	11%	0.5%	48379	8%	0.3%	43077	7%	0.2%
Audiovisual goods	455	0%	0.0%	793	0%	0.0%	492	0%	0.0%
Design goods	114694	44%	1.8%	243521	41%	1.5%	301262	47%	1.7%
New media goods	17506	7%	0.3%	53809	9%	0.3%	43744	7%	0.2%
ALL CREATIVE SERVICES	**63778**	**24%**	**3.9%**	**180864**	**31%**	**4.6%**	**192186**	**30%**	**4.4%**
Advertising and related services	8843	3%	0.5%	28747	5%	0.7%	32265	5%	0.7%
Architecture and related services	18786	7%	1.2%	80354	14%	2.1%	80307	12%	1.8%
Research and development services	12763	5%	0.8%	30366	5%	0.8%	33161	5%	0.8%
Personal, cultural and recreational services	23386	9%	1.4%	41396	7%	1.1%	46452	7%	1.1%

Source: UNCTAD, Oxford Economics

Note: Creative goods are expressed as a % of total goods exports, creative services are expressed as a % of total services exports and total creative industries are expressed as a % of all exports of goods and services

Table A.4.2: Exports of all creative industry (goods and services) in benchmark countries, by subgroup, 2002, 2008 and 2011

	2002			2008			2011		
	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports	Value in $ millions	% of creative industries	% total exports
ALL CREATIVE INDUSTRIES	**84255**	**100%**	**5.1%**	**175580**	**100%**	**4.0%**	**217189**	**100%**	**4.3%**
ALL CREATIVE GOODS	**72073**	**86%**	**5.5%**	**148256**	**84%**	**4.2%**	**188512**	**87%**	**4.5%**
Arts crafts goods	6222	7%	0.5%	14509	8%	0.4%	16753	8%	0.4%
Visual arts goods	6871	8%	0.5%	10977	6%	0.3%	13955	6%	0.3%
Performing arts goods	510	1%	0.0%	0	-	-	0	-	-
Publishing goods	6243	7%	0.5%	11236	6%	0.3%	10540	5%	0.3%
Audiovisual goods	184	0%	0.0%	256	0%	0.0%	102	0%	0.0%
Design goods	47501	56%	3.6%	99165	56%	2.8%	138176	64%	3.3%
New media goods	4541	5%	0.3%	12114	7%	0.3%	8985	4%	0.2%
ALL CREATIVE SERVICES	**12182**	**14%**	**3.5%**	**27324**	**16%**	**3.2%**	**28677**	**13%**	**3.2%**
Advertising and related services	2820	3%	0.8%	7836	4%	0.9%	8921	4%	1.0%
Architecture and related services	2513	3%	0.7%	7839	4%	0.9%	7655	4%	0.9%
Research and development services	2784	3%	0.8%	4356	2%	0.5%	3994	2%	0.4%
Personal, cultural and recreational services	4066	5%	1.2%	7293	4%	0.9%	8108	4%	0.9%

Source: UNCTAD, Oxford Economics

Note: Creative goods are expressed as a % of total goods exports, creative services are expressed as a % of total services exports and total creative industries are expressed as a % of all exports of goods and services

Appendix 5: WIPO copyright industries

Table A.5: Contribution of copyright industries to GDP and employment (WIPO)

Country	Year of publication	% contribution of copyright industries to GDP					% contribution of copyright industries to employment				
		Total share	Core	Interdependent	Partial	Non-dedicated	Total share	Core	Interdependent	Partial	Non-dedicated
CANADA	2002	5.38%	3.99%	*	*	*	6.96%	*	*	*	*
COLOMBIA	2006	3.3%	1.05%	0.80%	0.30%	0.40%	5.8%	1.70%		1.90%	1.50%
DOMINICA	2012	3.40%	1.25%	0.30%	0.68%	1.38%	4.80%	1.97%	0.06%	0.28%	2.50%
GRENADA	2012	4.60%	2.12%	0.30%	0.96	1.22%	3.60%	1.34%	0.38%	0.82%	1.05%
JAMAICA	2007	4.81%	1.70%	0.74%	0.47	1.90%	3.03%	1.79%	0.31%	0.23%	0.68%
JORDAN	2012	2.43%	1.53%	0.12%	0.21	0.57%	2.88%	1.80%	0.08%	0.20%	0.80%
MALAYSIA	2008	5.70%	2.90%	2.10%	0.60	0.10%	7.50%	4.70%	1.60%	0.90%	0.20%
MEXICO	2006	4.77%	1.55%	1.69%	0.85	0.68%	11.01%	3.41%	3.65%	2.53%	1.41%
PANAMA	2009	6.35%	5.40%	0.06%	0.05	0.84%	3.17%	1.52%	1.20%	0.31%	0.13%
PERU	2009	2.67%	1.23%	0.28%	0.02	1.14%	4.50%	2.09%	0.14%	0.07%	2.20%
PHILIPPINES	2006	4.82%	3.53%	0.96%	0.04	0.29%	11.10%	8.81%	1.40%	0.20%	0.60%
SOUTH AFRICA	2011	4.11%	2.05%	0.56%	0.21	1.29%	4.08%	2.31%	0.51%	0.23%	1.03%
SOUTH KOREA	2012	9.89%	3.51%	4.75%	0.66	0.97%	6.24%	2.85%	1.59%	0.67%	1.12%
ST KITTS AND NEVIS	2012	6.60%	4.29%	0.56%	0.93	0.82%	3.10%	1.44%	0.45%	0.81%	0.41%
ST LUCIA	2012	8.00%	4.38%	0.26%	2.13%	1.23%	4.40%	1.85%	0.33%	1.09%	1.14%
ST VINCENT AND THE GRENADINES	2012	5.60%	2.73%	0.13%	1.09%	1.66%	4.90%	1.81%	0.15%	1.01%	1.81%
TRINIDAD AND TOBAGO	2011	4.80%	1.41%	0.13%	0.97%	2.28%	5.00%	2.67%	1.73%	0.20%	0.41%
USA	2011	11.10%	6.36%	2.25%	0.22%	2.27%	8.19%	3.93%	2.17%	0.26%	2.03%

Note: The different categories of copyright-based industries are as follows:

a. The core copyright industries: this group brings together all industries wholly dedicated to the creation, production, representation, exhibition, communication, distribution and sale of materials protected by copyright (i.e. music, literature, theatrical productions, film, communication media, visual arts, advertising services and collective copyright management).

b. The interdependent industries: these are industries that contribute to the production, manufacture and sale of equipment. Their purpose is to facilitate the creation, production and use of material protected by copyright (manufacture and sale of appliances such as televisions, CD recorders and computers, musical instruments and photographic equipment, etc.).

c. The partial copyright industries: these refer to certain activities that are related or linked to materials protected by copyright (such as jewellery, architecture, handicrafts, etc.).

d. The non-dedicated support industries: this category relies indirectly and marginally on materials protected by copyright. Industries in this group dedicate their efforts equally to other activities not related to copyright (sales of telephone and transport equipment and other products).

Appendix 6: Data matrix of data availability

Table A.6: Creative industries data availability by country

	Creative Industries Data Coverage													
													Economic Impact	
	Trade	Film, TV & Audiovisual	Music	Advertising	Cultural Heritage	Publishing	Entertainment Software	Arts & Craft	Fashion	Performing Arts	Design	Patents	GDP	Employment
OAS Countries														
Antigua & Barbuda	✕	✕	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Argentina	✓✓✓	✓✓✓	✓✓✓	✓✓	✓✓	✓✓	✓✓✓	✕	✕	✕	✓	✓✓✓	✓✓	✓✓
Bahamas	✓✓✓	✕	✕	✕	✓	✓	✕	✕	✕	✓	✕	✓✓✓	✕	✕
Barbados	✓✓✓	✕	✓	✕	✓	✓	✕	✕	✕	✓	✕	✓✓✓	✓✓	✓✓
Belize	✓✓✓	✕	✕	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Bolivia	✓✓✓	✓✓✓	✕	✕	✓	✓✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Brazil	✓✓✓	✓✓✓	✓✓	✓	✓✓	✓✓	✓✓	✓	✓	✓	✕	✓✓✓	✓✓	✓✓
Canada	✓✓✓	✓✓✓	✓✓	✓	✓✓✓	✓✓	✓✓✓	✓	✕	✕	✕	✓✓✓	✓✓✓	✓✓✓
Chile	✓✓✓	✓✓✓	✓✓	✓	✓✓	✓✓✓	✕	✓	✕	✓✓✓	✕	✓✓✓	✓✓✓	✓✓✓
Colombia	✓✓✓	✓✓✓	✓✓	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✓✓✓	✓✓✓
Costa Rica	✓✓✓	✓✓✓	✓	✓	✓✓	✓✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Dominica	✓✓✓	✕	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Dominican Republic	✓✓✓	✓✓✓	✓	✕	✓✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Ecuador	✓✓✓	✓✓	✓	✕	✓✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
El Salvador	✓✓✓	✓	✓	✕	✓	✓✓	✕	✕	✕	✓	✕	✓✓✓	✓✓	✓✓
Grenada	✕	✕	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Guatemala	✓✓✓	✓	✓	✓	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Guyana	✓✓✓	✓✓	✕	✕	✓	✓✓	✕	✕	✕	✓	✕	✕	✕	✕
Haiti	✕	✓	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Honduras	✓✓	✓	✕	✓	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Jamaica	✓✓✓	✓	✓	✕	✓	✓	✕	✕	✕	✓	✕	✓✓✓	✓✓	✓✓
Mexico	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✕	✓	✕	✓✓✓	✓✓	✓✓
Nicaragua	✓✓✓	✓✓✓	✕	✓	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Panama	✓✓✓	✓	✓	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Paraguay	✓✓✓	✓✓	✕	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓
Peru	✓✓✓	✓✓✓	✓✓	✓	✓✓	✓✓✓	✕	✓	✕	✓	✕	✓✓✓	✓✓	✓✓
St Kitts and Nevis	✓✓	✓	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
St Lucia	✕	✓	✓	✓	✓	✓	✕	✕	✓	✓	✕	✕	✓✓	✓✓
St Vincent and the Grenadines	✓✓	✓✓	✕	✕	✓	✓	✕	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Suriname	✓✓	✓✓	✕	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕✕	✕✕
Trinidad & Tobago	✓✓✓	✓	✕	✕	✓	✓✓	✕	✕	✕	✓✓	✕	✓✓✓	✓✓	✓✓
United States	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✕	✓✓	✕	✓✓✓	✓✓	✓✓
Uruguay	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✓	✕
Venezuela	✓✓✓	✓✓✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✓	✕
Benchmark Countries														
China	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Italy	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✓✓	✓	✕	✓✓✓	✓✓	✓✓
Jordan	✓✓✓	✓✓	✕	✓	✓✓	✓✓	✕	✕	✕	✓	✕	✓✓✓	✓✓	✓✓
Malaysia	✓✓✓	✓✓✓	✕	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Mauritius	✓✓✓	✓✓✓	✕	✕	✓	✓✓	✕	✕	✕	✕	✕	✓✓✓	✕	✕
Philippines	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
South Africa	✓✓✓	✓✓✓	✓✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
South Korea	✓✓✓	✓✓✓	✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓
Spain	✓✓✓	✓✓✓	✓✓	✓	✓✓✓	✓✓✓	✓✓	✕	✕	✓	✕	✓✓✓	✓✓	✕
UK	✓✓✓	✓✓✓	✓✓	✓	✓	✓✓	✓✓	✕	✕	✕	✕	✓✓✓	✓✓	✓✓

✕	No data
✓	Moderate Data
✓✓	Reasonable Data
✓✓✓	Good Data

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