

# 1 Defining and measuring cultural and creative sectors

There is no universal definition of cultural and creative sectors. Each country has its own definition and produces different types of statistics relating to cultural participation, cultural and creative employment, and other factors. Inconsistencies in definition and in data collection make international comparisons of cultural and creative sectors (CCS) problematic. This chapter reviews existing approaches to defining CCS across OECD countries and offers an in-depth explanation of the methods used in this report to produce comparative statistics.

## Defining cultural and creative sectors

**There is no universal definition of cultural and creative sectors (CCS).** In 1972, the United Nations Educational, Scientific and Cultural Organization (UNESCO) launched a project to develop a measurement system to classify cultural activities, publishing a preliminary guidance document on defining and measuring the sector in 1979 (Horowitz, 1981<sup>[1]</sup>). Over the following two decades, policy interest in the economic benefits that culture and creativity provide began to grow and various definitions, methodologies and approaches began to be used to classify and measure its impact at both national and international levels. However, even defining in theoretical terms what constitutes a cultural or creative sector is not straightforward, and this complexity is compounded by differences in the availability of data, as well as aggregations used, in national industrial classification systems.

**There is no consistency in terminology relating to CCS.** Early policy work by UNESCO and others referenced *cultural activities*. By the late 1990s terminology had shifted towards *cultural industries*, reflecting a greater focus on the economic benefit they provide. A further shift in terminology occurred in the early 2000s, with policy work referencing *creative industries*, encompassing a wider range of activities which were not as overtly cultural as traditional sectors (such as dance or music), but required significant amounts of creativity (such as advertising or architecture). The broadening of definitional approaches continued, with recent work using the terminology of cultural or creative ecosystems, to denote the importance of culture and creativity to all aspects of the economy (UNESCO/UNDP, 2013<sup>[2]</sup>). In this report, we prefer the term *cultural and creative sectors (CCS)*, as it acknowledges both the significant contribution of not-for-profits and publicly funding organisations to the ecosystem of creative work (which may be inadvertently overlooked when referring solely to industries) and reflects the integrated nature of these sectors in other industry spaces (for example, the relevance of design for car manufacturing).

**Conceptualising CCS is non-trivial.** The cultural cycle model of CCS developed by UNESCO (UNESCO, 2009<sup>[3]</sup>) conceptualises CCS in regards to a production cycle, with relevant activities being those which contribute to the creation, production, dissemination, exhibition/reception/transmission or consumption/participation of cultural products and services. Similarly, The United Nations Conference on Trade and Development (UNCTAD) distinguishes between upstream and downstream creative activities, with upstream activities relating more to production of creative and cultural goods and downstream activities relating more to the market (UNCTAD, 2010<sup>[4]</sup>). A further approach, which focuses more on creative and cultural inputs, is the concentric circles model of CCS (Throsby, 2008<sup>[5]</sup>) which describes a core of artistic activity, surrounded by concentric circles of broader cultural and creative activities which require increasingly less artistic labour to fulfil their functions. What these models, as whole, attest to, is the broad scope of CCS and the heterogeneity of activities it includes.

**National definitions of CCS also vary in scope.** For example, some countries include information technology (IT) consultancy services and software development in their definition of CCS, whereas other countries only include the videogames component of software development. Some countries include amusement parks, cultural education, sport, tourism or gastronomy, whereas others exclude these sectors. A few countries include social science and humanities research and development and some countries have a specific category for circus. These national level definitions typically reflect variations in national policy priorities and data availability, but they also reflect, in part, the absence of a widely recognised international statistical standard.

**Listed below are some of the various definitions of CCS used in national economic estimates in OECD countries.** Where possible, these definitions have been taken from statistical offices' official datasets (including cultural satellite accounts) and statistics publications from cultural ministries. However, not all countries produce regular statistics on the economic contribution of CCS, so in these cases, definitions have been taken from singular mapping studies, either by government departments or by third-party consultants. The list outlines the main subsector groups, as used in each country's presentation of

data on cultural and creative business and enterprise data. This list is not exhaustive, but rather forms the first step in beginning to map national level CCS statistical definitions across the OECD.

- **Australia:** Advertising; Architecture; Broadcasting, electronic or digital media and film; Design; Environmental heritage; Fashion; Libraries and archives; Literature and print media; Museums; Music composition and publishing; Other culture goods manufacturing and sales; Performing arts; Supporting activities; Arts education; Visual arts and crafts (Statistics Working Group of the Meeting of Cultural Ministers, 2018<sup>[6]</sup>).
- **Austria:** Architecture; Audiovisual and multimedia; Books and press; Cultural education; Cultural heritage, archives, libraries; Fine arts; Performing arts (Statistics Austria, 2021<sup>[7]</sup>).
- **Canada:** Advertising; Architecture; Art reproductions; Archives; Books; Broadcasting; Collected information; Crafts; Cultural heritage; Design; Education and training; Festivals and celebrations; Film and video; Interactive media; Libraries; Music publishing; Natural heritage; Newspapers; Original visual art; Other published works; Performing arts; Periodicals; Photography; Sound recording (Statistics Canada, 2022<sup>[8]</sup>; Statistics Canada, 2011<sup>[9]</sup>).
- **Chile:** Architecture, Design and creative services; Audiovisual and interactive media; Handicrafts; Cultural education; Heritage; Literary arts, books and press; Musical arts; Performing arts; Transversal (including sectors related to retail trade, news and journalism and R&D in the humanities and social science); Visual arts (Ministerio de las Culturas, las Artes y el Patrimonio, 2022<sup>[10]</sup>).
- **Colombia:** Advertising; Associative and regulatory activities; Cultural and creative education; Audiovisual; Cultural heritage; Cultural tourism; Design; Digital media and content software; Publishing; Manufacturing activities of the Orange Economy; News agencies and other information services; Performing arts and shows; Phonographic; Visual arts (El Congreso de Colombia, 2017<sup>[11]</sup>; DANE, 2021<sup>[12]</sup>).
- **Costa Rica:** Advertising; Audiovisual; Design; Cultural and artistic education; Music; Performing arts; Publishing; Visual arts (Sistema de Información Cultural de Costa Rica, 2021<sup>[13]</sup>).
- **Czech Republic:** Advertisement; Architecture; Audiovisual and interactive media; Art education; Cultural heritage; Culture management incl. its support; Fine arts and crafts; Performing arts; Periodical and non-periodical press (Czech Statistical Office, 2019<sup>[14]</sup>).
- **Denmark:** Advertising services; Amusement and theme parks; Architecture; Archives; Computer games; Crafts; Design; Film; Gambling; Libraries; Literature and books; Museums; Music; Newspapers and magazines; Performing Arts; Photography; Sports; TV & Radio; Zoological and botanical gardens; Miscellaneous cultural activities (Statistics Denmark<sup>[15]</sup>).
- **Estonia:** Advertising; Architecture (interior architecture, landscape architecture, civil engineering design); Art (visual arts, retail sale of art supplies, framing, restoration, and production of works of art, and associated activities); Audiovisual (film and video, broadcasting); Cultural heritage (handicrafts, museums, libraries); Design (product and original design, design services); Entertainment software (mobile, online, computer and console games, software service providers for game developers, importers, localisers and associated activities); Music (authors and performers, production, live performance, private schools, manufacture and sale of musical instruments, production and sale of recordings, ancillary activities for concert organisation and associated activities); Performing arts (theatre, dance, festivals); Publishing (publishing, printing and associated activities) (Estonian Ministry of Culture, 2020<sup>[16]</sup>).
- **Finland:** Artistic, theatre and concert activities; Libraries, archives, museums, etc.; Production and distribution of books; Art and antique shops; Newspapers, periodicals and news agencies; Production and distribution of motion pictures and videos; Manufacture and sale of musical instruments; Sound recordings; Radio and television; Printing and related activities; Advertising; Architectural and industrial design; Photography; Amusement parks, games and other

entertainment and recreation; Manufacture and sale of entertainment electronics; Organisation of cultural events and related activity; Education and cultural administration (Statistics Finland, 2019<sub>[17]</sub>).

- **France:** Advertising; Architecture; Artistic crafts; Books and press; Audiovisual and multimedia (including computer games publishing, film and cinema, television, radio and parts of music); Cultural education; Heritage (including libraries, museums and historic sites); Visual arts (including design, photography and visual arts) (Ministère de la Culture, 2021<sub>[18]</sub>).
- **Germany:** Music; Book; Film; Art; Broadcasting; Performing arts; Design; Architecture; Press; Advertising; Software/games; Miscellaneous (Libraries/archives, Operation of monuments; Fairground trades and amusement parks; Botanical and zoological gardens and nature parks) (Söndermann, Backes and Arndt, 2009<sub>[19]</sub>).
- **Greece:** → See Eurostat definition (Hellenic Republic Ministry of Culture and Sports, 2017<sub>[20]</sub>).
- **Iceland:** → See Eurostat definition (Statistics Iceland, 2019<sub>[21]</sub>).
- **Italy:** → See Eurostat definition (ISTAT, 2021<sub>[22]</sub>).
- **Korea:**<sup>1</sup> Advertising; Crafts; Film and broadcasting; Cultural heritage and cultural facilities; Gaming; Literature and Publishing; Music; Performing arts; Visual arts; Visual graphics and characters (Korea Culture and Tourism Institute, 2022<sub>[23]</sub>).
- **Latvia:** Advertising; Architecture; Cinematography; Computer games and interactive software; Cultural education; Cultural heritage; Design; Music; Performing arts; Publishing; Recreation, entertainment and other cultural activities; Television, radio and interactive media; Visual arts; (Latvian Ministry of Culture, 2020<sub>[24]</sub>).
- **Lithuania:** → See Eurostat definition (Statistics Lithuania, 2012<sub>[25]</sub>).
- **Mexico:**<sup>2</sup> Audiovisual media; Books, prints and press; Cultural production of households; Crafts; Design and creative services; Material and natural heritage; Music and concerts; Performing arts and shows; Training and cultural dissemination in educational institutions; Visual and plastic arts (INEGI, 2013<sub>[26]</sub>).
- **Netherlands:**<sup>3</sup> Book industry; Communication and information; Creative design; Creative arts; Cultural heritage; Film; Live entertainment; Music industry; Other art and heritage; Other publishing; Performing arts; Press media; Radio and television (Media Perspectives, 2019<sub>[27]</sub>).
- **New Zealand:** Broadcasting; Community and government activities (includes religious and secular community activities and cultural education and training); Film and video; Design; Heritage; Library services; Literature; Music; Performing arts; Services to the performing arts; Visual arts (Ministry for Culture and Heritage, 2009<sub>[28]</sub>).
- **Norway:** Advertising and events; Architecture; Design; Computer games; Film; Literature; Music; Operation of library, archive, museum and other cultural activities; Other areas; Other artistic and entertainment activities; Performing arts; Printed and digital media; Teaching; Visual art (Statistics Norway, 2019<sub>[29]</sub>).
- **Poland:** Advertising; Architecture; Audiovisual and multimedia arts; Artistic education; Books and press; Cultural heritage; Libraries and archives; Performing arts; Visual arts (Statistics Poland, 2021<sub>[30]</sub>).
- **Portugal:** → See Eurostat definition (Instituto Nacional de Estatística, 2021<sub>[31]</sub>).
- **Spain:** Activities of libraries, archives, museums and other cultural activities; Cinematographic, video, radio, television and music publishing activities; Design, creation, artistic and entertainment activities; Cultural education; Graphic arts and reproduction of recorded media; Manufacture of jewellery and similar items; Manufacture of supports and apparatus for image and sound, and musical instruments; News agency activities; Photography; Publishing of books, newspapers and

other editorial activities; Trade and rental; Translation and interpretation; Video game publishing. (Ministerio de Cultura y Deporte, 2021<sup>[32]</sup>).

- **Sweden:** Advertising; Architecture; Audiovisual (including audiovisual storage media; computer games; film & TV, radio); Cultural heritage (including archives, museums, historical and archaeological sites), Fashion; Literary and artistic creation; Literature & press (including press, uncategorised, literature, library); Performing arts (including music, cultural education, performing arts); Picture & shape (including art, design, photo) (tillväxt verket, 2018<sup>[33]</sup>).
- **Switzerland:** → See Eurostat definition (Federal Statistical Office, 2020<sup>[34]</sup>).
- **Turkey:** → See Eurostat definition (TURKSTAT, 2020<sup>[35]</sup>).
- **United Kingdom:** Advertising and marketing; Architecture; Product design, graphic design and fashion design; Crafts; Film, TV, video, radio and photography; IT, software, video games and computer services; Publishing and translation; Museums, galleries and libraries; Music, performing arts, visual arts and cultural education (DCMS, 2016<sup>[36]</sup>).
- **United States:**<sup>4</sup> Core arts and cultural production (including Arts education; Design services; Performing arts; Museums); Supporting arts and cultural production (including Arts support services; Construction; Information services; Manufacturing; Retail; Wholesale and transportation); (BEA, 2022<sup>[37]</sup>).

**Even the list of statistical definitions of CCS presented above fails to capture the real diversity of approaches to measuring CCS.** For example, while both Australia and the United Kingdom (UK) include fashion in their statistical definition of CCS, Australia includes within this category clothing and footwear manufacturing, wholesale and retail trade, whereas the UK only includes fashion design. Moreover, the higher level groupings presented above, mask differences in actual sectoral coverage. For example, in statistics from the Netherlands, architecture falls with the creative design group, whereas many countries group architecture on its own. Similarly, in statistics from Sweden, Libraries are presented within the Literature group, whereas in many other countries Libraries are grouped alongside museums. Additionally, some countries produce statistics relating to only those sectors which the country deems wholly cultural and creative, whereas other countries differentiate between core and support sectors and others account for partial inclusion of a sector.

**The inconsistency in national definitions is in part a function of differences in national classification systems.** The UN International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4, offers an international standard for industry classification. This standard has been designed to be as consistent as possible with other industry classification systems, such as the Australian and New Zealand Standard Industrial Classification (ANZSIC), the General Industrial Classification of Economic Activities within the European Communities (NACE), and the North American Industry Classification System (NAICS), as well as other activity classifications used around the world (UN, 2008<sup>[38]</sup>). However, while ISIC Rev.4 is broadly consistent with the majority of classification systems at a high (2-digit) level of disaggregation, there are many inconsistencies between classifications at a more disaggregated level. This is a particular problem for CCS, which are often only identifiable at low levels of granularity. For example, advertising is only distinguishable from market research and public opinion polling in ISIC Rev.4 at the 3-digit level of disaggregation. Similarly, video games publishing is not explicitly distinguishable from other software publishing in ISIC Rev.4 and is only distinguishable at the 4-digit level (for those countries which include it). Consequently, compiling international comparisons of CCS requires both highly detailed data and the ability to transpose data across different classification systems.

**Much work has been done to produce a definition of CCS and a methodology for its measurement which can be applied at an international level, yet there remain inconsistencies in adopting these approaches.** In 2006, the OECD launched a project on the international measurement of culture. The report highlighted the inconsistencies of national approaches and the issues faced in drawing international comparisons from national-level reporting (OECD, 2007<sup>[39]</sup>). Since then, there have been many attempts at conceiving an international methodology for the production of cultural and creative statistics, yet the adoption of these methodologies at a national level remains inconsistent.

**UNESCO's framework for cultural statistics proposes a common framework for measuring cultural, creative and related fields using a number of different indicators** (UNESCO, 2009<sup>[3]</sup>). This document lays out the industry and occupational codes that can be attributed to cultural and creative work, alongside a number of other indicators, such as government spending categories. The report has been widely influential, yet national level reporting generally remains inconsistent with this approach. Another important stream of work comes from the Convenio Andrés Bello (CAB) which has produced a number of guidance documents on cultural satellite accounts, outlining a methodology for producing national level additional statistics on CCS in a systematic way (CAB, 2020<sup>[40]</sup>). The methodology outlined in these reports has been extensively used in Latin America, producing some consistent results amongst those countries that have adopted it.

**At the European level, work on defining a common framework for developing CCS statistics began in 1995**, when the European Union (EU) Council of Culture Ministers adopted the first resolution on the promotion of statistics concerning culture and economic growth. Since then, the European working group on cultural statistics (LEG-Culture), followed by the European Statistical System Network on Culture (ESSnet-Culture), have worked on defining CCS and producing methodologies for its measurement that can be used to compile international comparisons (ESSnet-CULTURE, 2012<sup>[41]</sup>). This has resulted in Eurostat (the European statistics agency) producing regular harmonised cultural statistics for countries in the EU.

**Given its broad use and the close alignment of NACE to ISIC at low levels of disaggregation, this report uses the Eurostat classification of CCS.**<sup>5</sup> Following the extensive work of ESSnet-Culture, Eurostat regularly produces a wide range of statistics relating to CCS. To ease the burden of data collection and to retain consistency in international approaches, this report follows the definition of CCS set out by Eurostat in their 2018 publication Guide to Eurostat culture statistics (for a list of sectors see Table 1.2).

This definition covers 10 cultural domains:

- Heritage
- Archives
- Libraries
- Books and press
- Visual arts
- Performing arts
- Audio-visual and multimedia
- Architecture
- Advertising
- Art crafts

And six functions:

- Creation
- Production/publishing
- Dissemination/trade

- Preservation
- Education
- Management/regulation

**Cultural and creative employment goes beyond those employed directly in CCS and includes those employed in cultural and creative occupations in all sectors of the economy.** Historically, statistics relating to CCS employment considered only those directly employed by organisations classified as being in CCS. However, cultural and creative activity also occurs in other sectors of the economy, and many industries directly employ people to perform these roles. Consequently, policy makers are increasingly using a broader definition of cultural and creative employment to assess the impact of culture and creativity on an economy or society.

**The trident approach to measuring cultural and creative employment includes all those working in CCS and those working in cultural and creative occupations in other sectors of the economy** (Table 1.1). The creative trident approach (Higgs and Cunningham, 2008<sup>[42]</sup>) makes a distinction between cultural and creative sectors (which are industries) and cultural and creative occupations (which are jobs). Some people working in CCS will be employed in cultural and creative occupations (e.g. a dancer) and some will be employed in non-cultural and creative occupations (e.g. an accountant for a dance company). Equally, some people working in cultural and creative occupations will be employed in CCS and others will be employed in other sectors of the economy. Consequently, the trident model considers three groups of workers as being employed in cultural and creative employment:

**Table 1.1. The creative trident**

	Main sector of employment is a cultural and creative sector	Main sector of employment is not a cultural and creative sector
Main job is a cultural and creative occupation	x	x
Main job is not a cultural and creative occupation	x	

Note: Only workers in cells with a checkmark are counted in cultural and creative employment statistics.

Source: Adapted from Eurostat (2018<sup>[43]</sup>), *Guide to Eurostat Culture Statistics*, Publications Office of the European Union, Luxembourg.

## Employment and business statistics

### Employment

For the purpose of this report and following the definition of Eurostat, *cultural and creative employment* is defined as all individuals working in cultural and creative sectors as well as all individuals with cultural and creative occupations outside cultural and creative sectors (see Table 1.1). For the list of cultural and creative sectors considered in this report, see Table 1.2, and for the list of cultural and creative occupations considered in the report, see Table 1.3.

**Table 1.2. Cultural and creative sectors included in employment and business statistics**

NACE Rev. 2 code	Industry title	EU-LFS	Structural Business Statistics data	Business Demography data
18	Printing and reproduction of recorded media	x	x	x
32.12	Manufacture of jewellery and related articles		x	
32.2	Manufacture of musical instruments	x	x	
47.61	Retail sale of books in specialised stores		x	
47.62	Retail sale of newspapers and stationery in specialised stores		x	
47.63	Retail sale of music and video recordings in specialised stores		x	
58.11	Book publishing		x	
58.13	Publishing of newspapers		x	
58.14	Publishing of journals and periodicals		x	
58.21	Publishing of computer games		x	
59	Motion picture, video and television programme production, sound recording and music publishing activities	x	x	
60	Programming and broadcasting activities	x	x	x
63.91	News agency activities		x	
71.11	Architectural activities		x	x
74.1	Specialised design activities	x	x	x
74.2	Photographic activities	x	x	x
74.3	Translation and interpretation activities	x	x	x
77.22	Renting of videotapes and disks		x	x
90	Creative, arts and entertainment activities	x		x
91	Libraries, archives, museums and other cultural activities	x		x

Note: NACE refers to the statistical classification of economic activities in the European community. Revision 2 is the most recent version at the time of preparing this report.

Source: Adapted from Eurostat (2018<sup>[43]</sup>), *Guide to Eurostat Culture Statistics*, Publications Office of the European Union, Luxembourg.

**Table 1.3. Cultural and creative occupations included in employment statistics**

ISCO-08 code	Occupation title
216	Architects, planners, surveyors and designers
2353	Other language teachers
2354	Other music teachers
2355	Other arts teachers
262	Librarians, archivists and curators
264	Authors, journalists and linguists
265	Creative and performing artists
3431	Photographers
3432	Interior designers and decorators
3433	Gallery, museum and library technicians
3435	Other artistic and cultural associate professionals
3521	Broadcasting and audio-visual technicians
4411	Library clerks
7312	Musical instrument makers and tuners



ISCO-08 code	Occupation title
7313	Jewellery and precious-metal workers
7314	Potters and related workers
7315	Glassmakers, cutters, grinders and finishers
7316	Sign writers, decorative painters, engravers and etchers
7317	Handicraft workers in wood, basketry and related materials
7318	Handicraft workers in textile, leather and related materials
7319	Handicraft workers not elsewhere classified

Note: ISCO-08 refers to the International Standard Classification of Occupations-2008.

Source: Eurostat (2018<sub>[43]</sub>), *Guide to Eurostat Culture Statistics*, Publications Office of the European Union, Luxembourg.

Eurostat uses the European Union-Labour Force Survey (EU-LFS) data to develop cultural and creative employment indicators taking advantage of a crucial feature of EU-LFS – it provides information on both the sector and occupation of respondents. Not all economic activities can be properly measured due to data limitations. Therefore, for practical considerations, some sectors which are theoretically deemed “cultural” are excluded. Table 1.2 and Table 1.3 enumerate the cultural and creative economic activities (as defined by NACE Rev. 2) and occupations (as defined by ISCO-08), respectively, that can feasibly be estimated from the EU-LFS. Moreover, not all countries provide NACE Rev. 2 and ISCO-08 information at the 4-digit level. For such countries, the information is estimated based on information from countries that do provide data at the more detailed levels. For a complete list of cultural and creative economic activities and the estimation process, see Eurostat (2018<sub>[43]</sub>).

It is important to note that *only main jobs* are captured. Individuals with a cultural and creative occupation (e.g. artists), often have another job. The EU-LFS respondents decide which job they consider as their “main” job. The main job is usually the one which accounts for the highest number of work hours. If a respondent considers their cultural and creative job to be secondary, it will not be counted towards cultural and creative employment, which results in its underestimation.

Employment figures in this report are drawn from LFS data and will differ from national accounts and enterprise data due to inherent differences between the sources. LFS data is the preferred source for measuring cultural and creative employment, not only because it provides data on both sector and occupation, and so is able to capture individuals working in cultural and creative occupations outside of cultural and creative activities, but also because it is better able to capture workers engaged in entities that may be below the thresholds (e.g. size of firm) or scope (e.g. legal status of firm, such as self-employed or informal) of business statistics. While the national accounts provide exhaustive coverage (including workers outside of the scope of LFS, such as those aged under 15 and those living in communal households), often using a combination of business statistics and LFS and other administrative sources, these are typically not at a suitably detailed level and, of course, provide estimates only by activity (i.e. sector of employment) and rarely with breakdowns by occupation. An additional advantage of LFS is their ability to provide for additional analysis across socio-economic groups.

Data for non-EU countries were drawn from alternative data sources or provided by countries. Cross-walks were used to match national industry and occupation codes to NACE Rev. 2 and ISCO-08 codes where possible, in order to closely align with the Eurostat definition of cultural employment. Data for Korea was provided by Statistics Korea, KOSIS (Korean Statistical Information Service). Data for Australia were provided by the Australian Bureau of Statistics based on the census. Data for Canada was obtained from estimations on the Canadian Labour Force Survey. CC employment was estimated for the United States from the American Community Survey, and for Mexico, it was estimated from the Mexican National Survey of Occupation and Employment.

Estimates of cultural and creative employment in this report may differ from national estimates as countries may include /exclude certain industries and occupations in their national definitions of cultural and creative employment and CCS enterprises.

### ***Limitations of labour force surveys***

1. The lack of disaggregated data in certain countries, which restricts the capacity to recognise cultural occupations when NACE and ISCO codes are not known at the requisite level of detail. In addition, the number of available NACE and ISCO digits are not consistent across countries nor are they always consistent over time which may cause breaks in time series.
2. The level of detail of secondary activities is not as high as that recorded for primary activities, so this creates an inability to capture secondary activities and results in an underestimation of cultural and creative employment.
3. The inability to capture voluntary work.

### *Volunteer work in cultural and creative sectors.*

Many cultural and creative workers engage in volunteer and/or hobbyist work. Volunteer work is sometimes measured by ad-hoc surveys and special modules to existing data sources but they rarely have enough information to capture cultural and creative workers as defined in this report. This accounts for a considerable share of unpaid work that is not always identifiable in national accounting systems, not least as the market value of the labour services provided is costed at zero (e.g., estimates of output or turnover, if they volunteer for market-based enterprises, would implicitly embody the value of their efforts but not as labour costs), and rarely, if ever, in structural business statistics.

### *Job vacancies*

To complement labour supply data, Burning Glass Technologies (BGT) data was used to measure partial labour demand. BGT collects job vacancy data by web scraping over 40 000 distinct job boards and company websites (Cammeraat and Squicciarini, 2021<sup>[44]</sup>). The database covers a wide range of EU countries as well as countries outside the EU such as Australia, Canada, and the United States. Thus, the database can be used to measure partial labour demand across countries. The report makes use of this data to track cross-country labour demand dynamics by comparing online job vacancies at different points in time in order to reveal the effects of the COVID-19 pandemic on the labour market.

Each observation in the BGT database represents a job. The database has several useful variables including the economic activity the job falls under and the occupation classification. Cultural and creative jobs were identified according to the definition described above. Due to some data limitations, economic activities were limited to the following 2-digit sectors: Printing and reproduction of recorded media (18); Publishing activities (58); Motion picture, video and television programme production, sound recording and music publishing activities (59); Programming and broadcasting activities (60); Creative, arts and entertainment activities (90); and Libraries, archives, museums and other cultural activities (91).

### ***Limitations of online job vacancy data:***

1. Exclusion of self-employment data (as it is not advertised).
2. A possible false-positive pattern: what could appear as a rise in the number of employment opportunities could in reality be simply an increase in the number of online job postings. This can also make long-term trend comparisons problematic.
3. Differences in contract type and employment patterns (e.g. predominance of short-term contracts) may make cross-sectoral comparison biased.

## **Enterprise statistics**

Business indicators such as the number of CCS enterprises operating within countries, birth/death/survival rates, and value-added at factor cost are developed by combining data from the Business Demography (BD) and Structural Business Statistics (SBS) databases of Eurostat and the OECD. While the main unit of analysis for employment statistics is the *person*, for enterprise statistics it is the *business entity* (typically an enterprise or establishment). Whilst BD data is typically sourced from a statistical business register (often complemented with other administrative data), SBS data, which are also based on statistical business registers for some variables such as counts of firms, are either based on exhaustive (typically periodic) economic censuses or annual surveys of businesses (typically drawing on a stratified sample based on statistical business registers).

The tables in Annex A of this report list the cultural and creative sectors (NACE Rev. 2) that were included for each country. All the relevant sectors were aggregated to arrive at a final count of cultural enterprises for each country. In the case of birth/death/survival rates, due to data limitations, cultural sectors were limited to 59, 60, 7111, 741, 742, 743, 7722, 90, and 91. An unweighted average of the sectors was taken to produce a final rate for CCS enterprises.

Due to missing data for some sectors in certain countries, the final indicator for CCS enterprises may underestimate certain indicators. For non-EU countries, cross-walks were used to match the sectors as closely as possible to those described in Table 1.2.

While the number of enterprises could be estimated for 37 countries (31 OECD), gross value added is only available for 31 countries (24 OECD). It should be noted that gross value added from the SBS data may not always align with those from national accounts due to the fact that in some countries, gross value added includes intermediate consumption of services as well as the fact that activities below reporting thresholds (including informal activities) are not covered. Moreover, it is important to point out that the value-added indicators were not available for creative arts and entertainment activities (R90) and library and archive activities (R91), so the GVA statistics presented in this report only capture value-added for some parts of CCS.

### **Limitations of business databases**

1. Lack of regional data (although regional indicators exist, economic activity codes are not detailed enough to properly measure the cultural and creative sectors).
2. Non-market activities are out of scope.
3. Reliance on official business registers may underestimate the presence of cultural and creative activities due to the sometimes informal nature and unofficial legal status of economic actors within this sector.
4. Additionally, business registers used to compile business statistics typically exclude small businesses below a certain administrative threshold (e.g. VAT thresholds), and often certain legal forms (e.g. unincorporated enterprises, such as the self-employed), which vary by country (Eurostat, 2018<sup>[43]</sup>).

## **Public finance statistics**

Public finance related to cultural activities is measured by government spending on cultural services. The data is drawn from the OECD national accounts database module on Classifications of Functions of Government (COFOG). The database splits government spending by function into 4 institutional levels:

1. Central government

2. State government (only applicable in federal and quasi-federal countries)
3. Local government, and
4. Social security funds

Government spending is categorised according to 10 broad categories – one of which contains the sub-category, “cultural services”:

1. General public services
2. Defence
3. Public order and safety
4. Economic affairs
5. Environment protection
6. Housing and community amenities
7. Health
8. Recreation, culture and religion
  - recreational and sporting services,
  - cultural services;
  - broadcasting and publishing services,
  - religious and other community services,
  - R & D recreation, culture and religion,
  - recreation culture and religion n.e.c.
9. Education
10. Social protection

The statistics used in this report focus primarily on the *cultural services* component only. *Cultural services* are defined as:

*Provision of cultural services; administration of cultural affairs; supervision and regulation of cultural facilities; operation or support of facilities for cultural pursuits (libraries, museums, art galleries, theatres, exhibition halls, monuments, historic houses and sites, zoological and botanical gardens, aquaria, arboreta, etc.); production, operation or support of cultural events (concerts, stage and film productions, art shows, etc.); grants, loans or subsidies to support individual artists, writers, designers, composers and others working in the arts or to organizations engaged in promoting cultural activities. Includes: national, regional or local celebrations provided they are not intended chiefly to attract tourists. Excludes: cultural events intended for presentation beyond national boundaries (01.13); national, regional or local celebrations intended chiefly to attract tourists (04.73); production of cultural material intended for distribution by broadcasting (08.30). It includes both operating and capital expenditure (capital transfers and direct investment in cultural infrastructure). (Eurostat, 2019<sup>[45]</sup>).*

## Cultural participation statistics

Cultural participation in the report is defined as individual and household engagement in cultural activities and measured by the frequency of visits to cultural activities such as cinemas, live performances (e.g. concerts), and cultural sites (e.g., museums) as well as how often individuals practice artistic activities (e.g., singing, dancing, playing musical instruments, writing fictions/poems, etc.). This type of data is drawn from Eurostat’s Cultural Statistics database for 2015.

Dimensions of cultural participation can also be measured by examining household spending on recreational and cultural services, drawing on data from the OECD National Accounts database (Final Consumption Expenditure of Households module). For the purposes of the report, household spending

refers to domestic spending, i.e. expenditures in the national territory including from non-resident households (and excluding spending by households abroad). Household spending is categorised into 12 broad categories – one of which contains the sub-category “recreational and cultural services” (UN, 2018<sup>[46]</sup>):

1. Food and non-alcoholic beverages
2. Alcoholic beverages, tobacco and narcotics
3. Clothing and footwear
4. Housing, water, electricity, gas and other fuels
5. Furnishings, households equipment and routine maintenance of the house
6. Health
7. Transport
8. Communications
9. Recreation and culture
  - Audio-visual, photographic and information processing equipment
  - Other major durables for recreation and culture
  - Other recreational items and equipment, gardens and pets
  - *Recreational and cultural services*
    - Hire and repair of photographic and cinematographic equipment and optical instruments
    - Hire, maintenance and repair of major durables for recreation
    - Hire and repair of games, toys and hobbies
    - Hire and repair of equipment for sport, camping and open-air recreation
    - Veterinary and other services for pets
    - Recreational and sporting services
    - Games of chance
    - Services provided by cinemas, theatres and concert venues
    - Services provided by museums, libraries, and cultural sites
    - Photographic services
    - Other cultural services
  - Newspapers, books and stationery
  - Package holidays
10. Education
11. Restaurants and hotels
12. Miscellaneous goods and services

To complement national data on household spending on recreational and cultural services, regional data from national statistical offices of Belgium, Canada, Italy, and the United Kingdom were used to examine regional differences in cultural participation as measured by household spending on recreational and cultural services. However, household expenditure at the sub-national level includes expenditures by households in other regions (i.e. not just their own), therefore household expenditure can serve as an estimate of the participation of households in culture but is less equipped to give an indication of the economic importance of the culture sector in the region.

## Survey of Adult Skills (PIAAC)

The employment chapter makes use of the Programme for the International Assessment of Adult Competencies (PIAAC) data to estimate *literacy* and *numeracy* skills for OECD workers aged 16 to 65 in cultural sectors with available data: Printing and reproduction of recorded media (18); Publishing activities (58); Motion picture, video and television programme production, sound recording and music publishing activities (59); Programming and broadcasting activities (60); Creative, arts and entertainment activities (90); and Libraries, archives, museums and other cultural activities (91). Proficiency in literacy and numeracy are ranked according to 5 levels. A simple way to chart the outcomes is to present the percentage of adults scoring: below level 1, at level 1, at level 2, at level 3, at level 4, and at level 5 (2019<sub>[47]</sub>).

This international survey is conducted in over 40 countries as part of PIAAC measuring the key cognitive and workplace skills needed for individuals to participate in society and for economies to prosper. The evidence from the Survey has helped countries better understand how education and training systems can nurture these skills.

## Policy perspectives

**This report on international trends and issues in CCS has brought together a wide range of data sources.** In scoping data availability, the report draws on international best practice guidance and data standards. Understanding the impact of CCS on economies and societies at both local, national and international levels requires multiple sources of data. For example, business counts, firm survival rates, value added and employment statistics begin to offer an understanding of how CCS contribute directly to the economy. Moreover, the impact that CCS have on broader society through cultural participation is a crucial element of how they contribute to inclusive development. However, there are many in-direct ways in which CCS feed into other economic sectors (e.g. through supply chains, cross-industry collaboration, tourism etc.) and many further ways in which they contribute to society (e.g. health and well-being, addressing climate and sustainability issues, etc.), which are not directly captured by these statistics.

**There remain significant data gaps in CCS research which make it difficult to fully assess the impact of these sectors.** While many OECD countries produce their own data on CCS, these are not easily comparable due to differences in definition and methodology. Using internationally harmonised data offers the best opportunity to make meaningful comparisons across the OECD. However, much of this international data is only available at high levels of aggregation, thus preventing analysis of CCS in its entirety for many types of statistics.

**Understanding the full impact and potential of CCS requires a concerted, collaborative effort of data gathering and data standards across the OECD.** Considering the growing interest in CCS across the OECD, further collaboration between national statistics offices, international organisations, such as the OECD, UNESCO, Eurostat, the International Labour Organization (ILO), the World Intellectual Property Organization (WIPO), etc., data users and other national and international stakeholders could work towards addressing these data gaps.

### ***More granularity in reporting of employment and business statistics***

**Reporting of business and employment statistics at the four-digit level would enable international comparisons of the full range of CCS to be more easily made.** While there is less consistency between countries in industry and occupation codes at lower levels of disaggregation, routine reporting of business and employment statistics at the four-digit level would enable crosswalks between national classifications systems to be made for CCS and internationally comparable statistics to be produced for a fuller range of sub-sectors than has been possible in this report.

**More granular data on government spending and innovation would also enable more meaningful cross-country comparisons.** For example, not all government spending at the local level disaggregates spending on recreation and cultural services, from the broader category of recreation and culture. Similarly, Innovation and R&D statistics, typically do not disaggregate industry sectors in enough detail to identify CCS. Moreover, many countries do not report on Field of R&D (FORD) in their national accounts, which could give an indication of the extent to which R&D in the arts and humanities is contributing to innovation throughout the economy.

**Producing these kinds of granular statistics at the regional, as well as national, level is also needed.** Currently, regional level data is patchy and inconsistent across countries. In order to better understand the impact of CCS on regions and cities, more granular sub-national data is also required.

### ***Better data around second jobs, voluntary work and non-standard forms of employment***

**Cultural and creative employment statistics rely on being able to capture employment data at four-digit occupation level.** Currently, these data are only available for the majority of OECD countries through labour force survey information, which typically only examines a person's main job. The incorporation of questions relating to second jobs, or to voluntary work in these surveys would greatly increase the capacity to understand the full scale of cultural and creative employment.

**Similarly, data on freelancers in CCS could be greatly improved.** Freelance cultural and creative workers could work as self-employed sole traders, or could be registered as a company. Typically, detailed information about the occupation and industry that these types of workers are employed in is unavailable or inconsistent as it is not always possible to extract companies with no employees from enterprise data, or to extract occupation and/or industry information from self-employment data. Steps towards improving the granularity of enterprise and employment statistics to give better coverage for free-lance workers would help in better understanding their contribution to both CCS and to the wider economy.

### ***Better consistency of participation statistics***

**Currently, cultural participation is mainly assessed through surveys at the national level, or ad hoc modules to international surveys.** Enhanced data collection of cultural participation through more regular cultural participation surveys as well as more detailed categories to distinguish cultural activities in time-use surveys would enable better cross-country and cross-regional comparison. Moreover, there is scope to revisit current definitions of cultural participation to be more inclusive of contemporary forms of cultural practice. For example, participation through digital social media such as dance on platforms such as TikTok or photography on platforms such as Instagram, could also be considered.

### ***Greater integration of complementary data sources***

**New forms of big data present an opportunity to enhance official statistics with complementary data sources.** For example, data on online job vacancies, data extracted from company websites, data from social media and digital media platforms could all be used to enhance our understanding of production and consumption patterns in CCS, as well as cultural and creative employment and businesses.

Experimentation with the use of such complementary data sources is needed to ascertain the limits of such approaches and how the data can be used in a responsible way.

Further recommendations around data collection and analysis can be found within the main recommendations for each chapter of this report.

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## Notes

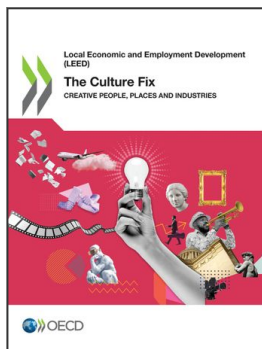
<sup>1</sup> Note that this definition includes the cultural industry and art industry sections of Culture, Sports and Tourism Industry Statistics tables. More detailed statistics relating to a number of specific sectors (such as advertising and cultural content) are also regularly produced.

<sup>2</sup> Note that these are the categories of cultural activities that Mexico include in their cultural satellite account statistics. They do not refer to industry sectors as such.

<sup>3</sup> Note, this definition comes from mapping studies. The Dutch government also produce satellite account statistics, but these statistics are based around cultural and creative activities, rather than industry sectors as such.

<sup>4</sup> Note that this definition comes from the Arts and Cultural Production Satellite Account, which identifies arts and cultural activities rather than industry sectors as such. Consequently, the sectors presented here are ones in which arts and cultural activity has been identified, rather than a strict industry-based classification.

<sup>5</sup> Readers are advised to note, as a consequence, that the statistics in this report may differ from national reporting. The statistics produced here are not intended to replace national approaches, but rather to supplement national reporting by offering a structured international comparison.



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