



WIPO-ITC Regional Training Seminar: Assessing the Economic Contribution and Performance of Creative Industries to National Economies - The Canadian Experience

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1. Context – Why we need data (Data supply and demand)

Assumptions:

- Good policy making needs good data
- Good data has a price - resources (\$ and FTEs)
- Move to evidence-based policy
- Data needs for policy development, program administration, performance reporting, and for communications. Exploring?
- Examples of data available from various sources:
 - **National stats agencies. Measurement bureaux. Industry associations. Copyright collectives. Regulatory agencies. Govt program data. International-level data.**

The Shift

- Measurement of the creative industries is in its youth
- Creative industries are now spoken of as an industrial sector. What are the implications of doing so?

2. Types of data needs

Data Needs – ‘clean’ (What we know)

- Economic impact – e.g. GDP, employment, trade, supply
- Labour force
- Measurement of the integrated value chains
- Demand: Audiences and consumption, non-digital environment

Data Needs – ‘complicated’ (What we don’t know)

- What's in the digital space?
- What's found in the in-between spaces – i.e. between film, television, interactive media?
- How are consumers accessing content now?
- Understanding levels and clusters of creativity - qualitative and quantitative
- Measuring the online world
- Conclusion: Measuring production, consumption and audiences has gotten a little more difficult

3. Creative Economy Stakeholders – Who are they? (Who wants the data?)

- Individual creators. Producers. Industry entities.
- National associations representing creators, copyright collectives. National industry associations. Associations of foreign-owned industries.
- Intermediaries. Internet service providers. Broadcasters
- Education community. Libraries and collections.
- All levels of government. Regulatory agencies. Politicians.
- Citizen consumers. 'Prosumers'. Export consumers.
- Legal community.
- Retailers.

4. Communicating data to stakeholders

- Opportunity for some stakeholder involvement in study design and methodology?
- Research studies and data posted to Govt. Internet sites
 - e.g. Recent announcement of Government's Open Data Portal with 260,000 datasets from 10 Departments
- Leverage possibilities of cost-sharing the research and data-gathering with industry groups, and other Depts.
- Data sharing agreements (of program data) with Statistics Canada
- Communicating stakeholder data needs to Statistical Agencies to complete the virtuous circle

5. Adapting to the digital environment – How do policies and programs receive stakeholder input?

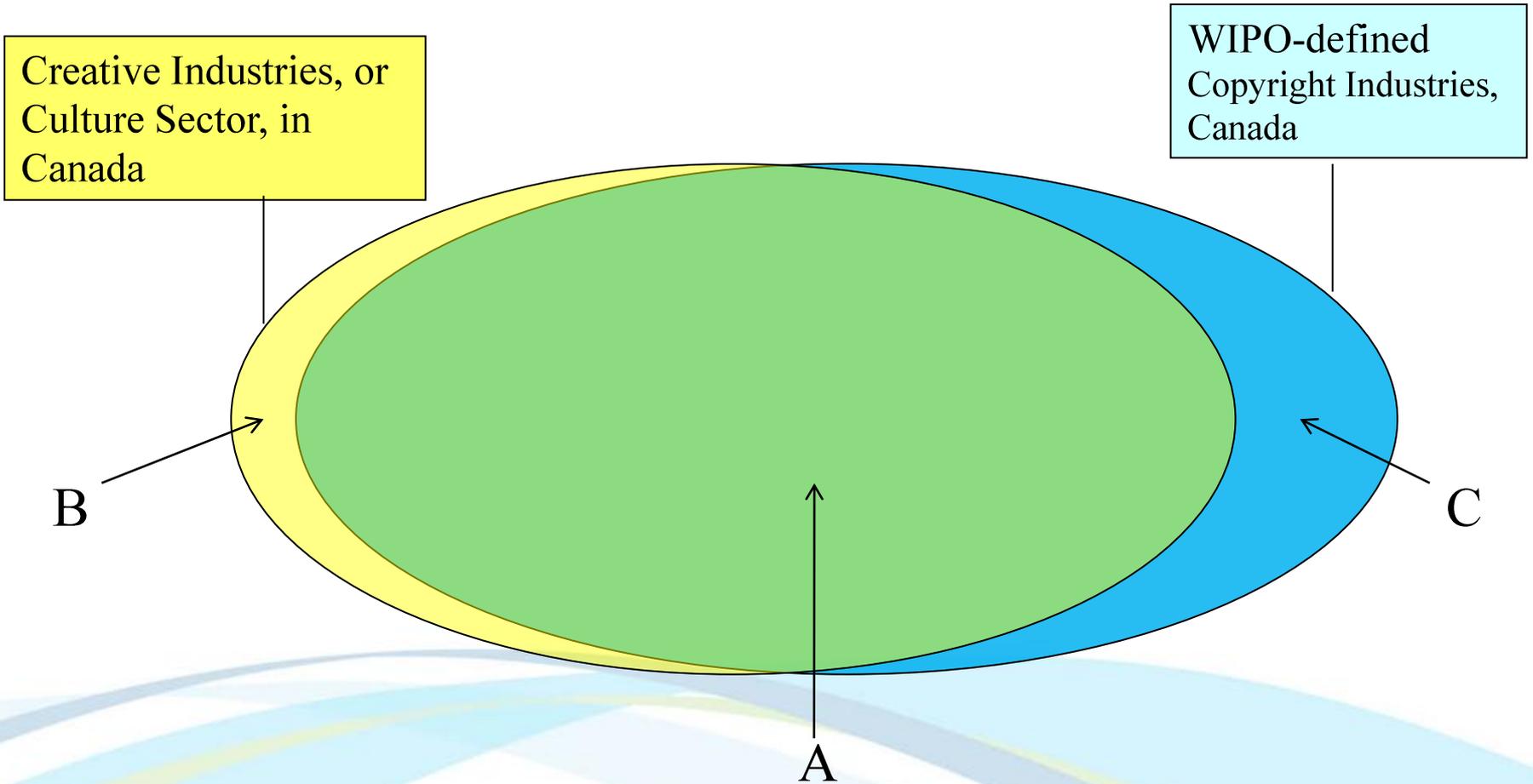
One model - Examples of some formal consultation processes:

- Copyright Consultations
- Consultations for Canada's Digital Economy Strategy
- Consultation Paper posted online
- Online 'Idea Forums' to submit, share, and rate ideas
- Round tables and Town hall meetings
- Formal online submissions
- Records of discussion posted online
- Follow progress using Twitter, RSS feeds, streaming video

6. Creative Industries in Canada – What's included?

- **Currently defined using Statistics Canada's *Canadian Framework for Culture Statistics (2004)***
- ***Framework* includes the following (Core & non-Core):**
 - Film and Television; Broadcasting; Book and Periodical Publishing;
 - Music and Sound Recording; Visual and Performing Arts; Photography;
 - Heritage; Design Services; Architectural Services; Advertising Services;
 - Copyrights, Libraries and archives, Festivals, Support services

7. Creative Industries vs. Copyright Industries in Canada



8. Creative Economy in Canada - Economic impact

The creative industries have:

- a direct economic contribution (GDP) of CAD\$46 Billion to the Canadian economy (2007) (CAD\$1 = XCD\$2.74 = US\$1.0236)
- direct employment of over 630,000 (2009).
- exports of culture goods \$1.5 B (2009) and services \$2.9 B (2007)
- imports of culture goods \$3.8 B (2009) and services \$2.6 B (2007)

Compare with other industry sectors in Canada (2007):

- Primary agriculture and forestry combined: GDP \$26.9 B
- ICT aggregation: GDP \$56.7 B
- Sources found in References section.

9. Statistics Canada and the creative economy

Some of the Statistics Canada products for measuring the creative economy:

- Seven culture Industry-specific surveys, e.g. Film and video (4); Book Publishers; Periodical publishers; Music publishers.
- Canadian Framework for Culture Statistics
- Labour Force Survey; Survey of Household Expenditures

- Culture satellite account – The first two phases of the feasibility study are completed. First examined 5 key sub-sectors to test approaches, then applied approaches to whole sector. Some of the topics:
 - Splitting of certain industries for more accurate detail;
 - Culture vs non-culture industries;
 - Production of culture vs. non-culture products;
 - Role of advertising in business models (e.g. periodical publishing, broadcasting).

10. References and further reading

- **Statistics Canada**
 - **Culture satellite account –TBD**
 - **Culture Goods Trade (1998-2009), Culture Services Trade (1998-2007): Data Tables.**
 - **Canadian Framework for Culture Statistics (2004; under revision)**
 - **Annual Survey of Service Industries:**
 - Book publishers
 - Periodical publishers
 - Sound recording and music publishing
 - Film, Television and Video Production
 - Film and Video Distribution
 - Film, Television and Video Post-Production
 - Motion Picture Theatres
 - Performing Arts
 - Newspaper publishers
 - **Government Expenditures on Culture (2007/08)**
 - **Labour Force Survey**
 - **Survey of Household Expenditures (Consumer expenditures on culture)**
- **UNESCO Framework for Cultural Statistics (2009)**
- **Valuing Culture: Measuring and Understanding Canada's Creative Economy**
- **Copyright Consultations: <http://www.ic.gc.ca/eic/site/008.nsf/eng/home>**
- **Digital Economy Consultation: <http://de-en.gc.ca/en/home/>**