Office of the President
Malacañang

MEMORANDUM CIRCULAR NO. 103

APPROVING AND ADOPTING THE PHILIPPINE CREATIVE INDUSTRIES DEVELOPMENT PLAN 2025-2034, AND DIRECTING THE IMPLEMENTATION THEREOF

WHEREAS, Section 2 of Republic Act (RA) No. 11904 or the "Philippine Creative Industries Development Act" declares it as a policy of the State to promote and support the development of Philippine creative industries by protecting and strengthening the rights and capacities of creative firms, artists, artisans, creators, workers, indigenous cultural communities, content providers, and stakeholders in the creative industries;

WHEREAS, Section 2 of RA No. 11904 established the Philippine Creative Industries Development Council (PCIDC) to implement a long-term plan for the development and promotion of the Philippine creative industries;

WHEREAS, Section 8 of RA No. 11904 mandates the PCIDC, in coordination with relevant government agencies, to formulate the Philippine Creative Industries Development Plan (PCIDP), which shall set forth the objectives, targets, strategies, and activities on the development and promotion of Philippine creative industries, to be submitted to the President for approval;

WHEREAS, from 2023 to 2024, the PCIDC held validation workshops and stakeholder consultations with various industry players and policymakers to formulate the PCIDP 2025-2034, and ensure that the strategies therein will help achieve the National Government's goal to position the Philippine creative industries as Asia's Premier Creative Hub by 2030;

WHEREAS, the PCIDC, through Resolution No. 01 (s. 2025), resolved to endorse the PCIDP 2025-2034 for the President's approval; and

WHEREAS, the effective implementation of the PCIDP 2025-2034 requires the active support and cooperation of all national government agencies, instrumentalities, local government units, and the private sector;

NOW THEREFORE, the following are hereby ordered:

The PCIDP 2025-2034, which is annexed to this Circular, is hereby **APPROVED** and **ADOPTED**.

BAGONG PILIPINAS

The PCIDC, as the lead agency responsible for the development and promotion of the Philippine creative industries, shall lead the implementation of the PCIDP 2025-2034.

In accordance with their respective mandates, all departments, agencies, bureaus, and offices of the National Government, including state universities and colleges, government-owned or -controlled corporations, and government financial institutions, are hereby directed, and all local government units and the private sector are hereby encouraged to support the implementation of the PCIDP 2025-2034, as well as the programs, activities, and projects specified therein.

Consistent with Section 8 of RA No. 11904, the PCIDC shall review the PCIDP every three (3) years from the date of its execution.

The funding requirements necessary for the initial implementation of this Circular shall be charged against current and available appropriations of concerned agencies, subject to pertinent budgeting, accounting, and auditing laws, rules and regulations. Thereafter, the funding requirements necessary for the continued implementation of this Circular shall be included in the budget proposals of said agencies, subject to the usual budget preparation process.

This Circular shall take effect immediately.

DONE, in the City of Manila, this 7th day of October, in the year of our Lord, Two Thousand and Twenty-Five.

By authority of the President:

LUCAS P. BERSAMIN
Executive Secretary

Office of the President
MALACAÑANG RECORDS OFFICE
CERTIFIED COPY
ATTY. LOVELY V. TOLENTINO-NAVA
DIRECTOR IV
10-08

Philippine Creative Industries Development Plan 2025-2034





Philippine Creative Industries Development Plan

The key visuals of the Philippine Creative Industries Development (PCID) Plan reflect its vision and strategic direction through bold symbolism and a vibrant palette. The sparkling torch and radiant beams represent the BEAMS framework, which guides the growth of the creative sector, while fireworks and circular motifs signify dynamism, sustainability, and continuity.

With a warm color scheme of orange, ube (purple), coral, and fuchsia, complemented by Filipino-made typefaces, the design balances clarity and adaptability. The unfolding roadmap blooms into a flower, symbolizing innovation and long-term progress. Seamlessly integrating infographics and storytelling across various platforms, the Plan strengthens the Philippines' position as Asia's Premier Creative Hub by 2030.



The Philippine Creative Industries Development Plan *(ISBN 978-971-0409-31-0)* is a comprehensive national roadmap intended to inform policymakers, industry stakeholders, and the general public about the strategic direction of the Philippines for developing creative industries. Mention of any firm and / or private entities does not imply the endorsement of the Department of Trade and Industry (DTI) and the Philippine Creative Industries Development Council (PCIDC) members. Given the dynamic nature of the creative industries, revisions to the Plan, guided by regular evaluations of local and global trends, along with expert recommendations, will be implemented upon the approval of the PCIDC.

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The PCIDC, chaired by the DTI, thanks all the partners and stakeholders who contributed to developing this policy document. Their insights and expertise have been invaluable in shaping the future of the Philippines' creative industries.

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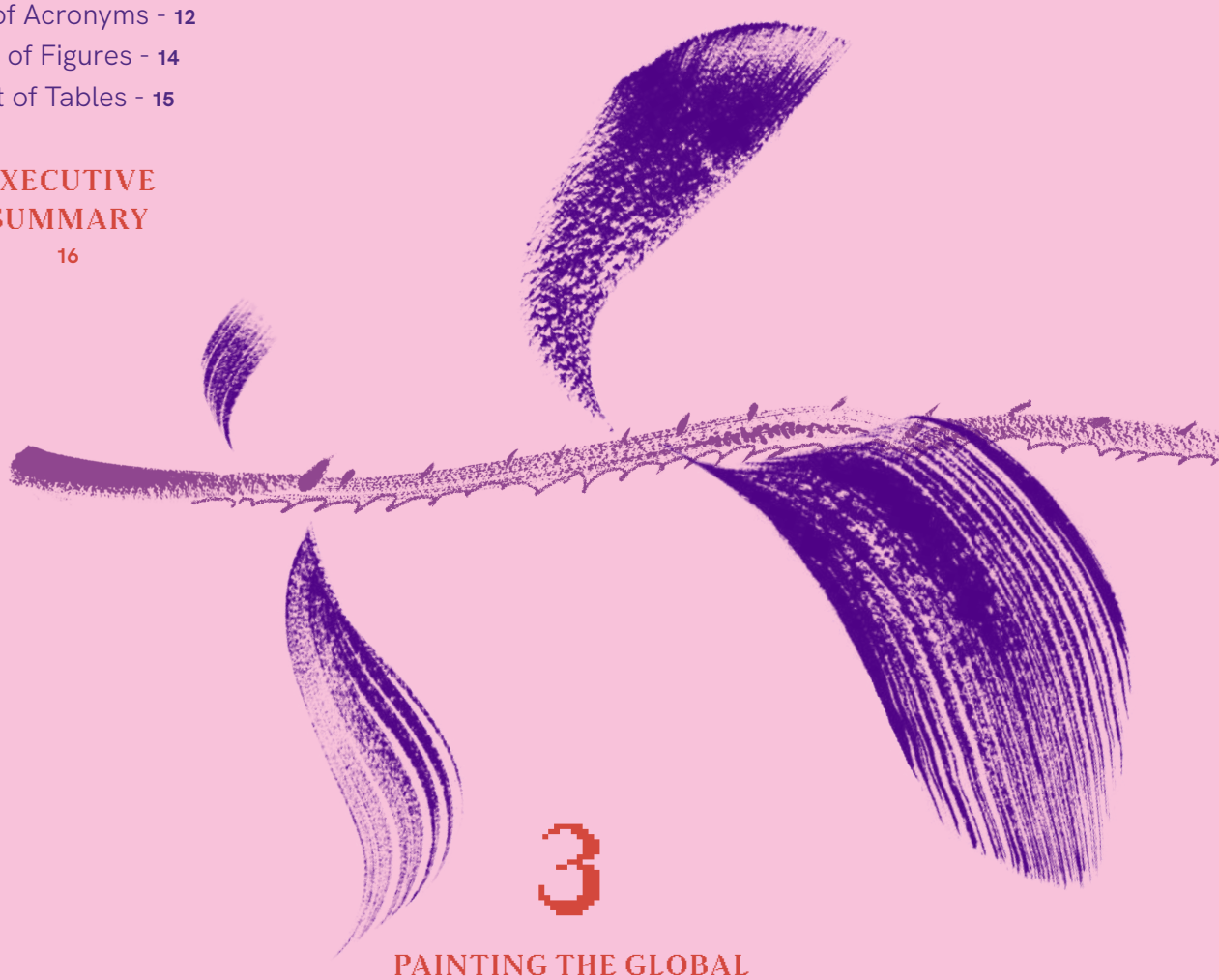
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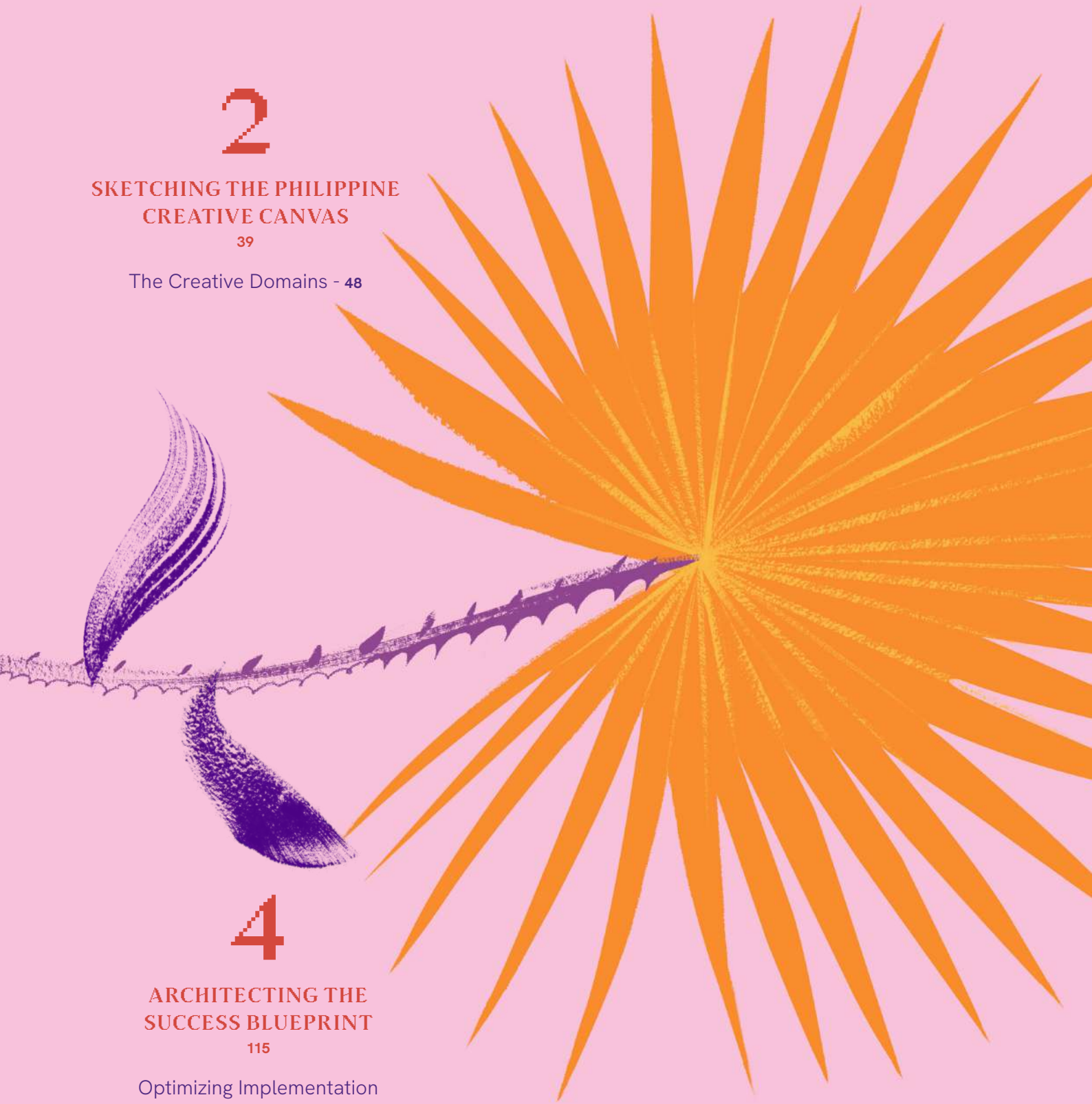
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Foreword by the President

It is with great pride and optimism that I present the Philippine Creative Industries Development (PCID) Plan 2025-2034 to the Filipino people and the rest of the world.

The PCID Plan 2025-2034 is our country's comprehensive blueprint that sets our objectives, strategic actions, and initiatives aimed at unlocking the full socio-economic potential of the Philippine creative industries. It underscores our nation's commitment to fostering innovation, creativity, and sustainable economic growth.

In my first State of the Nation Address (SONA), I made it clear that this administration will protect and promote our creative workers—those who give soul to our nation—and elevate Philippine culture and brand of creativity to the global stage. This is our commitment to our artists, designers, filmmakers, musicians, content creators, and all those who contribute to the vibrancy of our creative sectors. This commitment is at the heart of our vision for a *Bagong Pilipinas*—a new Philippines where socio-economic transformation is driven by the power of creativity and innovation.

With this direction, the country's national development plan, the Philippine Development Plan 2023-2028, recognizes the Philippine creative industries as key generators of jobs and economic value. In this Plan, we are laying down our strategy in strengthening the foundation of a creative ecosystem where creativity can flourish and Filipino talent can thrive. The Filipino people are innately creative. From the designs of our local weavers to the cutting-edge innovations of our tech entrepreneurs, the Philippines is brimming with talent and potential that deserves to be nurtured and showcased on the global stage. By investing in industry support, we aim to create an environment where the country's potential is maximized to drive our country's economic development and cultural renaissance.

As we embark on this journey, let us remember that the strength of our nation lies in our ability to dream, innovate, and create. *Bagong Pilipinas* envisions a nation where creativity and innovation drive new discoveries that will propel the Philippines to the forefront of global recognition. In this path, our artists, designers, and innovators will lead the way in cutting-edge technological advancements, sustainable practices, and cultural conservation.

I extend my heartfelt gratitude to all the stakeholders who have contributed to the formulation of this Plan. Your dedication and vision have been instrumental in shaping a strategy that will empower our creative industries and ensure their sustainable growth.

With this, I invite every Filipino to actively participate in a collective effort to achieve our vision of becoming **Asia's Premier Creative Hub by 2030.** Let us embrace the spirit of *bayanihan* and the values that are closest to the heart of every Filipino.

Mabuhay ang Malikhaing Pinoy! Mabuhay ang Bagong Pilipinas!



Ferdinand R. Marcos Jr.
President
17th President of the Republic of the Philippines

Preface

Asia's Premier Creative Hub by 2030.

This ambitious vision drives us toward a Philippines where creative industries meaningfully contribute to national development.

Creativity in the Philippines reflects its cultural richness and the diverse interactions that shape our communities. This seamless integration of creativity into daily life is evident in various aspects of Filipino culture, from social and family gatherings to home-based craft businesses, local town fiestas, digital content, televised talent contests, and global recognition of our creativity. This innate creativity connects our rich heritage with contemporary expressions in the digital realm.

The excellence of Filipino creativity is what the Philippine Creative Industries Development Act (PCIDA) seeks to harness, a dynamic landscape where culture and creativity drive progress and innovation.

We have drawn up the Philippine Creative Industries Development Plan (Plan) to actualize this transformative legislation. As a pioneering initiative, it articulates our objectives, targets, and strategic framework.

Our Plan does not commence on an empty slate but builds upon the milestones that have sculpted our nation's creative spirit over the years. It is a pioneering industrial policy that complements existing cultural and educational initiatives by the government. It is deeply inspired by and rooted in cultural heritage, creativity, and innovation.

Our Plan harmonizes the efforts and resources of both public and private sectors, aiming to establish the Philippines as a significant participant and contributor to the global creative economy. By addressing systemic challenges like capacity, skills development, funding, market access, and infrastructure, the Plan ensures the resilience and adaptability of our creative industries.

Our Plan unifies diversity and collaboration guided by the principles of self-determination and deliberative democracy. A whole-of-nation approach was employed to co-create this document, ensuring long-term commitment from the government, the private sector, and the creative community.

The passage of the PCIDA has set a strong precedent for our ambition: our steadfast commitment to activate this Plan will chart a definitive course from vision to action.



DTI Secretary Ma. Cristina A. Roque
Chairperson
Philippine Creative Industries Development Council

List of Acronyms

AAA Game	Triple A
AI	Artificial Intelligence
ASEAN	Association of Southeast Asian Nations
BOI	Board of Investments
CAD	Computer-Aided Design
CAGR	Compound Annual Growth Rate
CCP	Cultural Center of the Philippines
CHED	Commission on Higher Education
CISA	Creative Industries Satellite Account
CNC	Computer Numerical Control
CSO	Civil Society Organization
DCP	Design Center of the Philippines
DEPDev	Department of Economy, Planning, and Development
DepEd	Department of Education
DFA	Department of Foreign Affairs
DICT	Department of Information and Communications Technology
DILG	Department of the Interior and Local Government
DOLE	Department of Labor and Employment
DOST	Department of Science and Technology
DOT	Department of Tourism
DTI	Department of Trade and Industry
EU	European Union
FDCP	Film Development Council of the Philippines
FTEs	Full-Time Employees
GDAP	Game Developers Association of the Philippines
GDP	Gross Domestic Product
GII	Global Innovation Index
GVA	Gross Value Added
HEIs	Higher Education Institutions
IBPAP	IT and Business Process Association of the Philippines
IFPI	International Federation of the Phonographic Industry
IP	Intellectual Property
IPAs	Investment Promotion Agencies
IPOPHL	Intellectual Property Office of the Philippines
IT	Information Technology
IT-BPM	Information Technology and Business Process Management
LCAC	Local Culture and Arts Council

LGUs	Local Government Units
M&E	Monitoring and Evaluation
MSMEs	Micro, Small, and Medium Enterprises
NBDB	National Book Development Board
NCCA	National Commission for Culture and the Arts
NCR	National Capital Region
OECD	Organisation for Economic Co-operation and Development
OFM	Overseas Filipino Musicians
OFWs	Overseas Filipino Workers
OPM	Original Pilipino Music
PCCN	Philippine Creative Cities Network
PCIDA	Philippine Creative Industries Development Act
PCIDC	Philippine Creative Industries Development Council
PDP	Philippine Development Plan
PISA	Programme for International Student Assessment
Plan	Philippine Creative Industries Development Plan
PSA	Philippine Statistics Authority
R&D	Research and Development
SDGs	Sustainable Development Goals
TCE	Traditional Cultural Expressions
TESDA	Technical Education and Skills Development Authority
UNACOM	Unesco National Commission
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
VFX	Visual Effects
VR	Virtual Reality
WIPO	World Intellectual Property Organization

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Executive Summary

Filipino creativity is deeply rooted in rich traditions and cultural heritage. The creative sector, which accounts for 7.3% of the nation's GDP and employs 7.51 million people, is crucial in the Philippines' economic and social landscapes.

In 2022, the PCIDA was enacted to bolster the country's creative industries through comprehensive support and policy measures. The Plan, spearheaded by the Philippine Creative Industries Development Council (PCIDC), led by the Department of Trade and Industry (DTI), sets out the Philippine government's vision and action plan for this valuable and dynamic sector.

Part 1, **Weaving a Creative Blueprint**, presents our vision to become Asia's Premier Creative Hub by 2030**.** It outlines where we want to go and how we have designed the Plan to get there, notably by aligning with national and international development objectives, and working closely with diverse stakeholders. It is a story of how we will drive sustainable development, innovation, and global competitiveness.

By 2028, the Philippine creative ecosystem will be strengthened through capacity building and digital transformation, setting a solid foundation for growth. By 2030, the Philippines will emerge as a beacon of culture-led innovation and preferred partner of the global creative community, showcasing leadership on the world stage. By 2034, the creative industries will help transform the Philippines into a more prosperous, inclusive, and resilient society, enhancing well-being for all. These industries will significantly contribute to the GDP and job creation.

Thus, our mission for this industrial strategy is to position the Philippines as a global leader in the creative industries, as driven by culture, talent, and innovation. We have identified five priorities for our work: (1) Ignite Filipino ingenuity through creative hubs and clusters; (2) Boost creative entrepreneurship through research and development (R&D) and cutting-edge technology; (3) Regenerate cities and local economies through sustainable innovations; (4) Strengthen the global brand through international collaborations; and (5) Foster the next generation of creatives through capacity-building and leadership development.

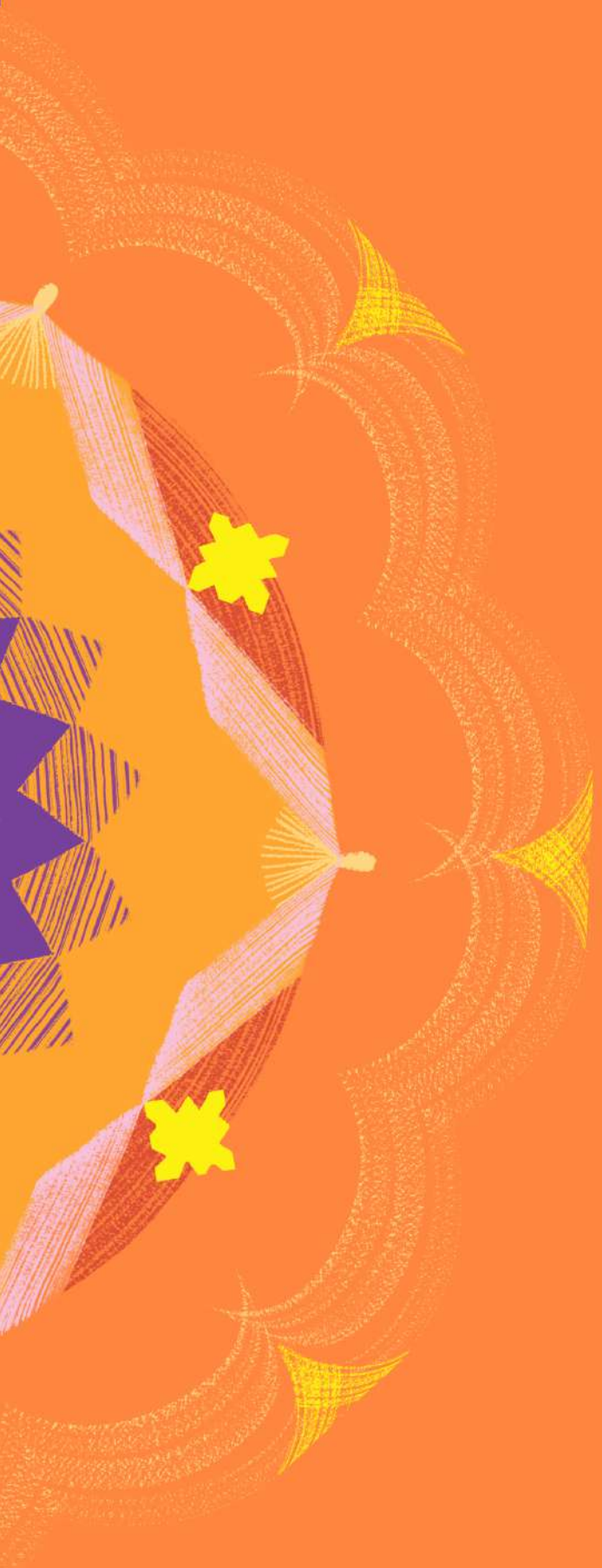
Part 2, **Sketching the Philippine Creative Canvas,** paints a picture of the Philippines' unique cultural and creative landscape and reveals its socio-economic impact across nine domains as specified by PCIDA. These include (1) Audiovisual Media, (2) Digital Interactive Media, (3) Creative Services, (4) Design, (5) Publishing and Printed Media, (6) Performing Arts, (7) Visual Arts, (8) Traditional Cultural Expressions, and (9) Cultural Sites.

Part 3, **Painting the Global Creative Industries,** analyzes global trends and challenges and attempts to position the Philippines within such a dynamic context. Additionally, it refers to lessons learned from other countries that have supported similar creative industries' policy agendas with the aim of optimizing government investment and interventions.

Part 4, **Architecting the Success Blueprint,** outlines our implementation framework. Being aware of the unique make and needs of diverse stakeholders, the Plan will support through incubation, innovation, and clustering in the form of five pillars: (1) Build Creative Ecosystems, (2) Empower Creative Workforce, (3) Accelerate Inclusive Innovation, (4) Mobilize Financing Support, and (5) Seize Market Opportunities. In addition, the industry approach seeks to grow industries with high potential for scalability and economic growth by optimizing their interconnected value chains. The Plan functions not only to reap 'low hanging fruits' but employ a long-term view for building the creative industries from the ground up.

It is our sincere hope that the Plan will lead the development of our cultural and creative industries, rooted in local contexts and connected globally. Through it, the Philippines will become a Premier Creative Hub that inspires, includes, and innovates.





1

Weaving a Creative Blueprint



Introduction

Creative industries are undeniably one of the most globally dynamic and rapidly expanding sectors, characterized by their widespread impact and multi-dimensional qualities. They play a pivotal role not only as economic drivers but as socio-cultural agents of change.

Filipino creativity, deeply rooted in cultural heritage and tradition, flourishes across various creative endeavors. In 2024, the creative industries significantly contributed to the economy, making up 7.3% of the GDP[1] and providing jobs to 7.51 million people. This growth is fueled by a young, highly skilled workforce with strong English proficiency and global connectivity, fostering collaboration and innovation on the international stage.

1 Philippine Statistics Authority, "Philippine Creative Economy Expands by 8.7 Percent in 2024, Accounted for 7.3 Percent of Gross Domestic Product. " July 29 2025

Yet, challenges persist. A lack of access to capital, skill gaps in digital literacy, and a deficit in entrepreneurial know-how have hindered the growth of creative ventures. Furthermore, limited professional development opportunities have led to underemployment and stagnant careers, particularly for marginalized groups struggling with market visibility and accessibility.

Addressing these weaknesses requires concerted efforts to enhance talent development, improve access to funding, and create a cohesive strategy that leverages the Philippines' creative potential.

In 2022, the PCIDA was enacted to bolster the country's creative industries through comprehensive support and policy measures. The law aims to support and grow the sector by protecting and strengthening the rights and capacities of creative communities. It seeks to uplift the lives of Filipino citizens by helping them build their livelihoods as creative professionals, which in turn will promote social well-being and pave the way for economic prosperity.

PCIDA defines the creative industries as "trades involving persons, whether natural or juridical, that produce cultural, artistic, and innovative goods and services originating in human creativity, skill, and talent and having a potential to create wealth and livelihood through the generation and utilization of intellectual property (IP)."[2]

Before the PCIDA, the governance structure for supporting the creative industries was fragmented, with no single government agency dedicated to its development. While some agencies attempted to take on this role, the dynamic and cross-sectoral nature of the creative industries made coordination challenging.

In response, the PCIDA established the Philippine Creative Industries Development Council (PCIDC) – a unified, inter-agency governance body designed to address the complex needs of diverse stakeholders in an ever-evolving landscape.

The PCIDC shall execute a long-term plan for the Philippine creative industries, capitalizing on the synergies between economic growth and cultural development.

Prior to the enactment of PCIDA, the DTI, along with local think tanks and government partners, began the groundwork in benchmarking international trends and frameworks, pilot mapping of the Philippine creative industries, and statistical research. This comprised the corpus of baseline knowledge that informed the development of the Plan.

From 2023 to 2024, the PCIDC led a series of validation workshops with over 200 stakeholders from the government, academe, think tanks, and creative professions. This research process ensured that literature reviews, baseline analyses, and their resulting action points are streamlined into a unified Strategy Framework inclusive of the Philippine experience. Stakeholder consultations with over 70 industry players and policymakers enriched the governance and risk management plan, along with its monitoring and evaluation system, to qualify the Plan's key outcomes set toward the vision.

Unlike conventional strategy documents, this Plan is as dynamic as the creative industries it seeks to nurture. It will be reviewed and updated according to evolving trends and well-founded recommendations not addressed in the current version.

2 Republic Act No. 11904. "An Act Providing for the Promotion and Development of the Philippine Creative Industries and Providing Funds Therefor" (2022).



The Plan sets the course to become Asia's Premier Creative Hub by 2030.

Our industrial strategy sets the course for the Philippines to become a global contributor to creativity and culture: a premier creative hub driven by culture, talent, and innovation. Through this Plan, the Philippines will emerge as a beacon of culture-led innovation and a preferred partner within the global creative community. A strong ecosystem and leadership will inspire more resilient jobs, knowledge exchange, and new investments. The Plan will enable us to transform our country into the ultimate destination for business, tourism, learning, innovation, and discovery.

The Plan articulates the country's vision and strategy to mobilize such a valuable sector. It puts a spotlight on fostering sustainable growth through strategic initiatives that drive economic and social vitality. Our hope is that it will inspire action and strengthen collaboration among public and private sectors. Its holistic and inclusive approach integrates transversal metrics such as new innovations, job creation, and social participation into every facet of development.

Ultimately, this Plan is for **you**—artists, innovators, creative and cultural professionals, educators, industry associations, and government and business partners. It will encourage practitioners and leaders to explore new support mechanisms in market building and professional growth. Investors and financial institutions interested in funding or investing will find it equally valuable as it maps out high-potential sectors and industry roadmaps. Policymakers and government officials will appreciate its approach to aligning local, national, and international perspectives on economic and social development. Moreover, the Plan aims to raise awareness about the critical importance of creative industries in cultural conservation, economic development, and citizenship.

Ultimately, this Plan is for you – artists, innovators, creative and cultural professionals, educators, industry associations, and government and business partners.

ALIGNING THE PLAN

The Plan aligns with various national and international strategic frameworks, ensuring comprehensive support for the growth and innovation of the Philippine creative industries (see Figure 1). Promoting Decent Work and Economic Growth, Industry, Innovation, Infrastructure, and Sustainable Cities and Communities, the Plan resonates with the United Nations' (UN) Sustainable Development Goals (SDGs) 2030.

In 2024, the Philippines ratified the United Nations Educational, Scientific, and Cultural Organization (UNESCO) Convention on the Protection and Promotion of the Diversity of Cultural Expressions. This convention emphasizes cultural diversity, artists' and cultural professionals' welfare, and international cooperation. This international treaty allows the Philippines to adopt supportive policies for cultural diversity, benefiting from UNESCO's capacity development programs, enhance market access, and promote artistic freedom.

The Plan also aligns with the Philippine Development Plan for Culture and the Arts (PDP-CA) 2024–2029, emphasizing the vital role of culture and the arts in shaping national identity. It supports

Figure 1

Harmonizing of the Plan with National and International Development Strategies



the integration of cultural heritage, the fostering of creativity, and the building of inclusive, resilient communities.

Similarly, the Philippine Development Plan (PDP) 2023-2028 backs the Plan's goals through market expansion, digital transformation, and promotion of public-private partnerships.

The Philippine Export Development Plan (PEDP) 2023-2028 further strengthens these objectives by encouraging creativity and innovation in exports.

The Plan aligns with the Micro, Small, and Medium Enterprise (MSME) Development Plan's goal of enhancing employment, business opportunities, and livelihoods for MSMEs in the creative sector.

Digital transformation and the establishment of a dynamic innovation ecosystem are echoed in the National Innovation Agenda and Strategy Document (NIASD) 2023- 2032.The National Tourism

Development Plan (NTDP) 2023-2028 shares the Plan's vision by focusing on sustainable tourism, infrastructure development, and building an industry anchored on Filipino identity, culture, and heritage.

Emphasizing advanced technologies and research collaborations, the Harmonized National Research and Development Agenda (HNRDA) 2022-2028 complements the Plan's focus.

The National Artificial Intelligence Strategy for the Philippines (NAIS-PH) supports the Plan through its emphasis on digital transformation and workforce development. This cohesive alignment across multiple strategic documents ensures a robust, well-developed framework where every consideration has been addressed for advancing the creative industries in the Philippines.

As a policy agenda, the arts and wider creative industries have been evolving globally since the 1990s. In formulating the Plan, we consulted diverse perspectives and drew from lessons learned to grasp the different ways that the creative industries can be supported by policy. As an economic and innovation driver, they are seen as crucial in job creation and industry development. As a basis for international relations, they serve as potent tools for increasing soft power, enhancing a nation's cultural brand and diplomacy while promoting mutual understanding. As a foundation of society, they push for cultural participation as a fundamental right to be enjoyed by all.

Known for their definitional challenges, the creative industries are often difficult to define due to their diversity, interconnectedness, and malleability. These complexities in definition and scope require a nuanced understanding to fully appreciate their breadth and impact. We acknowledge that the boundaries of what constitutes creative industries are constantly evolving and heterogeneous. On one hand, this fluidity reflects the dynamic, innovative, and adaptable nature of the creative industries. It is, therefore, essential to recognize the distinct contours of the Philippine creative industries as delineated by the PCIDA.

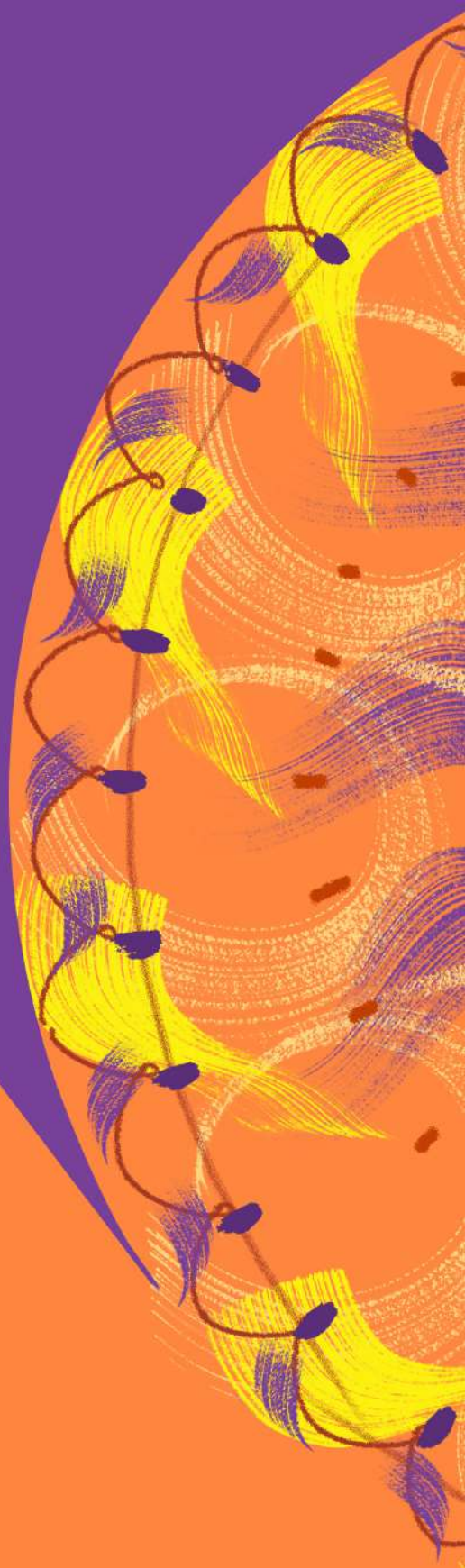
Our methodology for developing the Plan sought to align goals with governmental ambitions, sectoral needs, and broader societal aspirations. We worked with experts, partner agencies, and private sector stakeholders to create a cohesive instrument that celebrates diversity and encourages collaboration through a whole-of-nation approach.

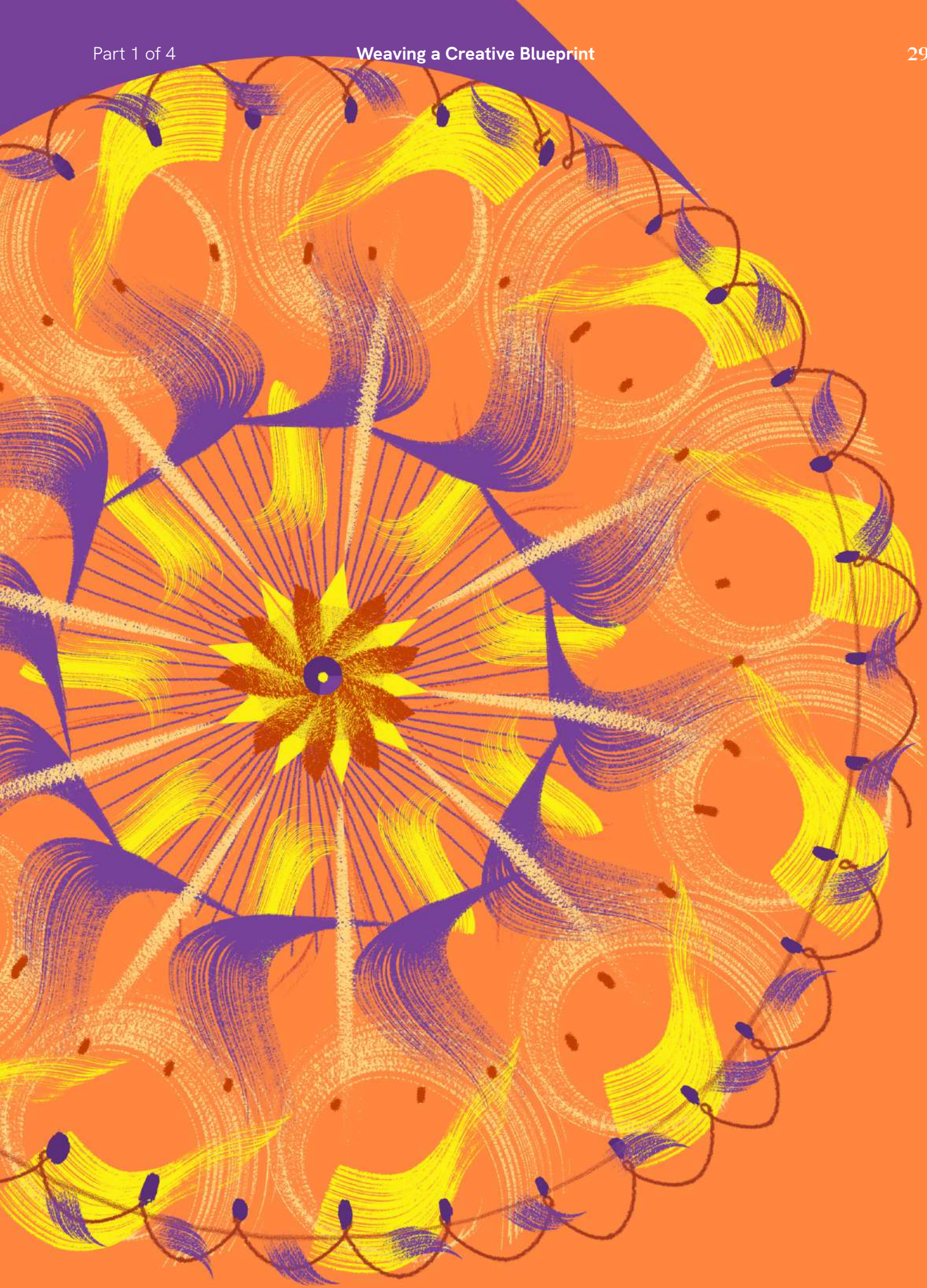
The initial phase assessed the arts and creative industries by commissioning research, collaborating with the Philippine Statistics Authority (PSA), and engaging top experts. It involved defining, mapping, and measuring the sectors, complementing situational analyses, and thorough policy reviews. The content development phase focused on stakeholder consultations to inform objective-setting and roadmapping. This ensured the Plan was evidence-based and considered lessons learned. Programs were then designed with the PCIDC and industry representatives, based on priorities and specific targets.

During consultations between 2021-2024, stakeholders expressed the following issues and concerns:

- Striking a critical balance between cultural-focused initiatives and economic growth;
- Preparing for the impact of digitalization on job security;
- Ensuring the availability of accessible and affordable creative spaces for creation and policies that promote Filipino works domestically and internationally;
- Recognizing the role of creative hubs and local government councils as crucial for experimentation, artistic expression, and product development;
- Establishing comprehensive education and training programs, integration of creative entrepreneurship into curricula, and professional development opportunities; and
- Strengthening intellectual property ecosystems and public-private partnerships are key to protecting artists' and workers' rights.

Our approach to policy-making was shaped through stakeholder feedback and informed by Filipino values of diversity, creativity, cultural sensitivity, collaboration *(bayanihan)*, empathy *(malasakit)*, and mutual trust.





What does it mean to be Asia's Premier Creative Hub and how do we get there?

A creative hub inspires, includes, and innovates. It is an ecosystem that creates synergies between culture and entrepreneurship, creative expressions, projects and ideas, and cutting-edge technology.

It provides an environment that nurtures talent, protects workers, and recognizes artists. It strives to become a knowledge center powered by strong industry-academe linkages and R&D. Our goal is to be the ultimate destination for business, tourism, learning, innovation, and discovery—a country with livable, creative cities that encourage cultural participation across all segments of society.

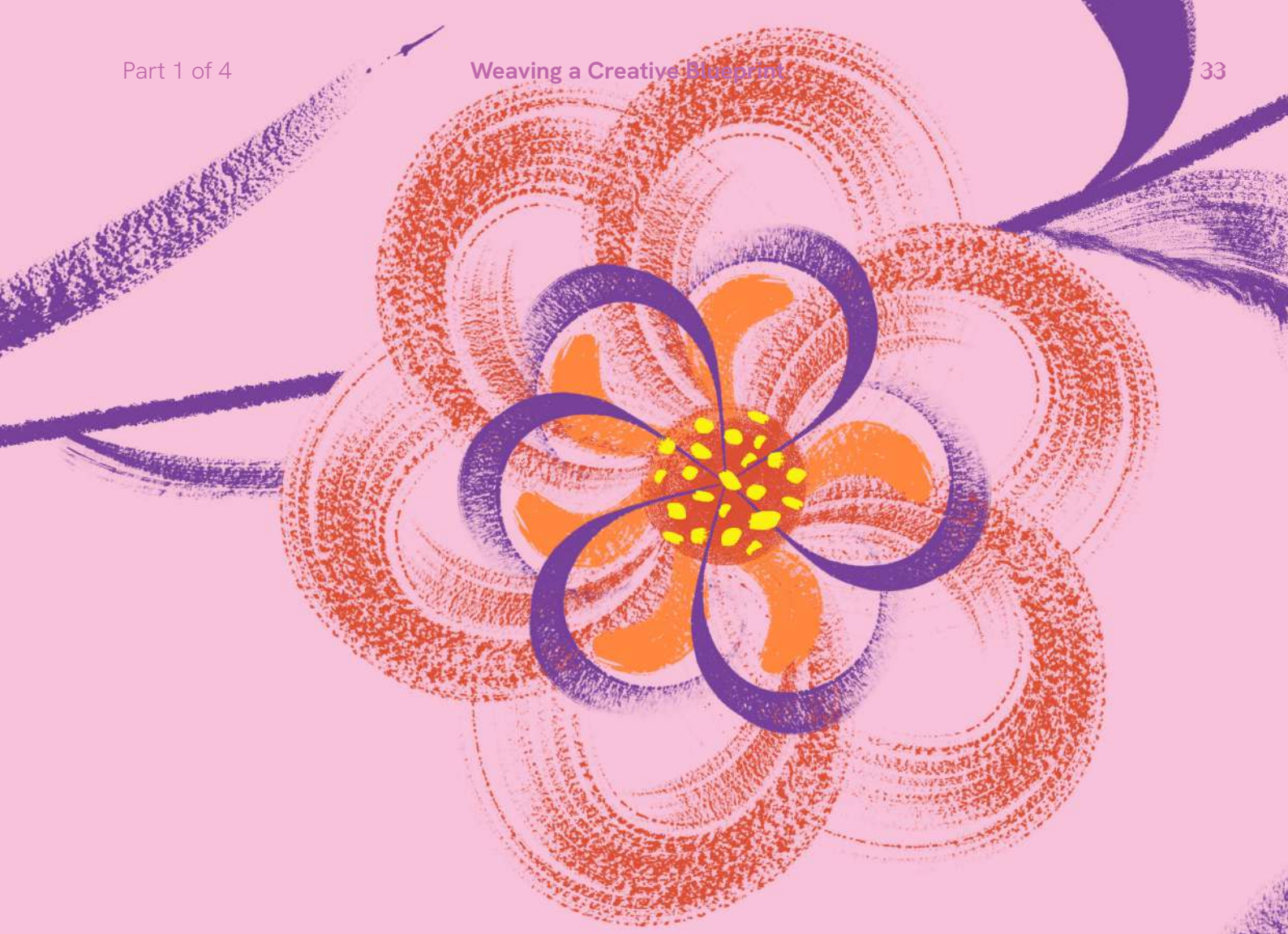
We have outlined key milestones to guide our progress toward achieving our vision.



By 2028, the first three years will focus on strengthening the foundations of the creative ecosystem by recognizing, nurturing, and mobilizing creative communities across the nation. We will create and refine policies to benefit stakeholders, tailored to their needs and ambitions.

We will support the workforce in building skills that align with job market demands, especially in the areas of creation, digital literacy, leadership, and entrepreneurship. We will identify priority clusters, MSMEs, and startups for growth by increasing allocated capital. We will establish alliances within the government, private sector, and international partners to expand our impact and reach.

By 2030, the Philippines will emerge as a beacon of culture-led innovation and a preferred partner within the global creative community. Its strong ecosystem and leadership will inspire more resilient jobs, knowledge exchange, and new investments. We will transform our country into the ultimate destination for business, tourism, learning, innovation, and discovery. Building upon the initial impact of the Plan, this period will focus on scaling and expanding our work. We will inspire growth within local economies and creative cities, leading to more resilient jobs, better products, and greater intellectual property optimization. All these will make the Philippines more competitive and raise our profile on the world stage.



By 2034, we will have achieved a more prosperous, inclusive, and resilient society enriched by vibrant creative industries. We will have helped transform the creative industries toward sustainability. We will have instilled a strong sense of belonging and pride in our cultural heritage, fostering social harmony and increasing well-being.



Priorities

To ensure that resources are optimized and streamlined, the Plan has determined a set of priorities that will be regularly reviewed to ensure continued relevance over time. Key Result Areas (KRAs) will help monitor the alignment of various outputs and activities with both short and long-term goals. The KRAs and priorities are designed to guide continuous progress and will remain pertinent throughout the Plan's 10-year lifecycle.

1 Ignite Filipino ingenuity through creative hubs and clusters

- Establish and promote innovations to boost sector-academe partnerships, strengthen experimentation, engage communities, and optimize intellectual property.
- Develop strategic zones where artists, startups, academia, technologists, and other value chain actors converge.

2 Boost creative entrepreneurship through R&D and cutting-edge technology

- Expand programs to enhance creative entrepreneurship through access to capital, skills development, science-based research and development, and cutting-edge technologies.
- Provide incubation, funding, training, and mentorship to transform creative ideas into successful ventures.

3 Regenerate cities and local economies through sustainable innovation

- Drive inclusive innovation to revitalize cities and local economies with advanced technologies and sustainable practices.
- Strengthen urban-rural synergies to create employment and livelihood opportunities for underrepresented communities and marginalized groups.

4 Strengthen the global brand through international collaborations

- Forge international collaborations to enhance global distribution capabilities and competitiveness.
- Establish strategic partnerships to facilitate knowledge exchange, cultural diplomacy, and technology transfer.

5 Foster the next generation of creatives through capacity-building and leadership development

- Address job-skills mismatches with upskilling programs.
- Build capacity and leadership through specialized training.
- Instill foundational creative values such as cultural appreciation and critical thinking in all Filipino learners, with emphasis on early education at the elementary level.

Strategic Framework

To become Asia's Premier Creative Hub by 2030

Where we are

Fragmented efforts and a lack of strategic interventions prevent the Philippine creative industries from realizing their true potential.

Priorities

1. Ignite Filipino ingenuity through creative hubs and clusters.
2. Boost creative entrepreneurship through R&D and cutting-edge technology.
3. Regenerate cities and local economies through sustainable innovations.
4. Strengthen the global brand through international collaborations.
5. Foster the next generation of creatives through capacity-building and leadership development.

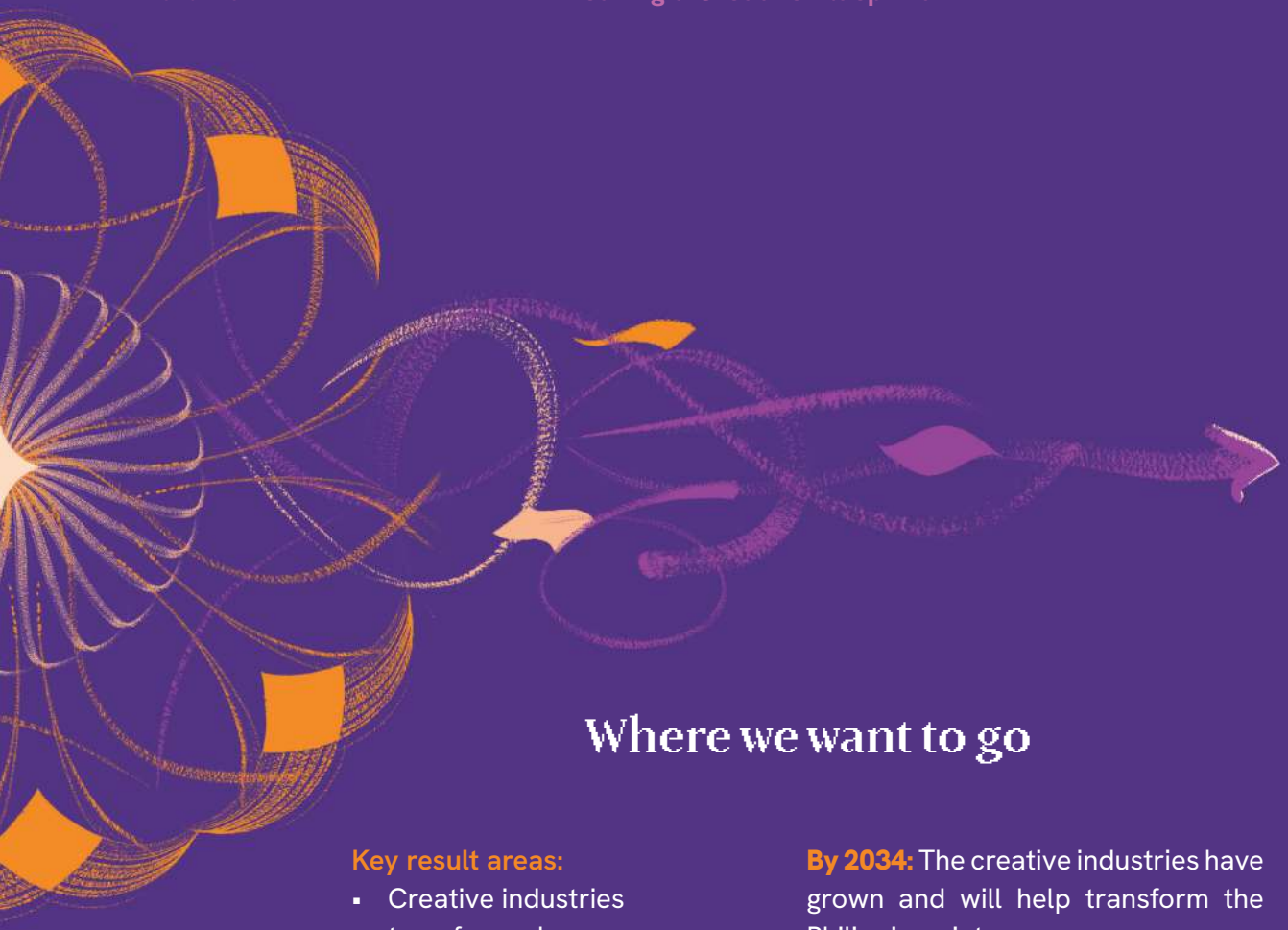
Outputs

- Build creative ecosystems
- Empower creative workforce
- Accelerate inclusive innovation
- Mobilize financing support
- Seize market opportunities

Guided by

A balancing act in policy-making

- Socio-cultural and economic development
- Market-driven and subsidized approaches
- Local and international growth
- Traditional / analog and digital / emerging art practices
- Artist as creator and artist as entrepreneur



Where we want to go

Key result areas:
- Creative industries transformed
- Sustainable practices integrated

By 2034: The creative industries have grown and will help transform the Philippines into a more prosperous, inclusive, and resilient society, enhancing well-being for all.

Key result areas:
- Philippine brand amplified
- Local economies revitalized
- More resilient jobs created

By 2030: The Philippines emerges as a beacon of culture-led innovation and a preferred partner of the global creative community, showcasing leadership on the world stage.

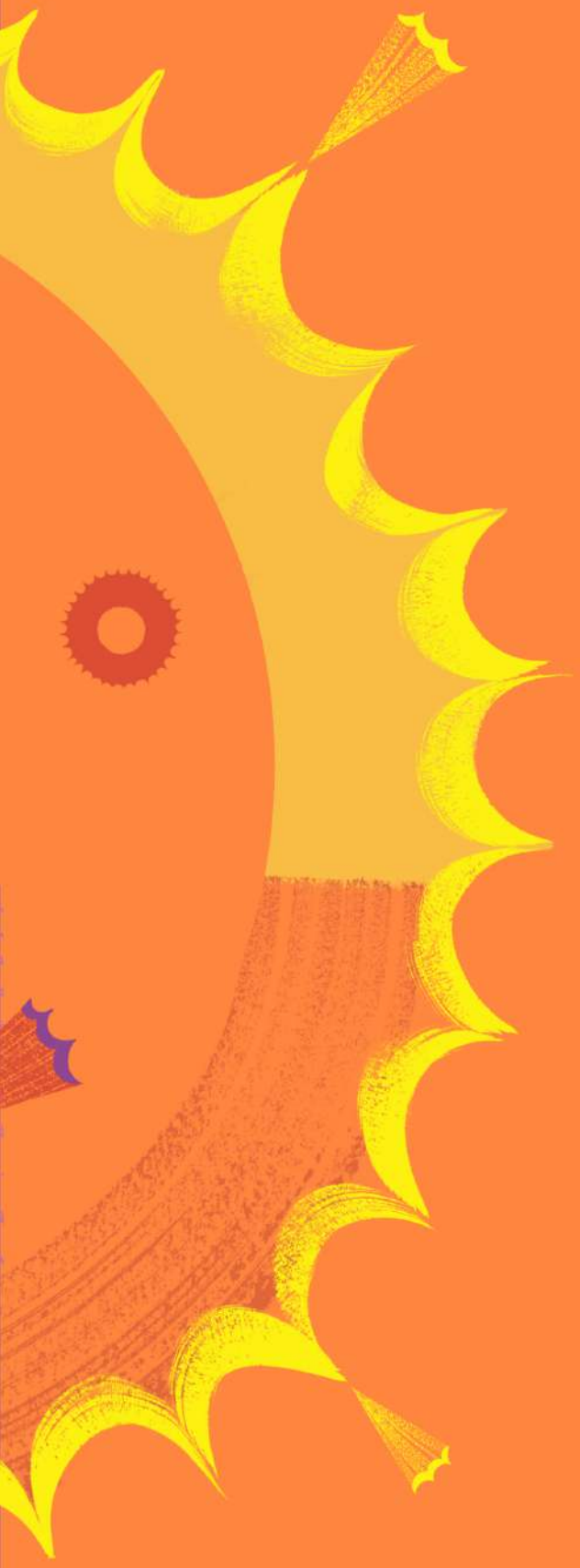
Key result areas:
- Workers better protected
- Cultural diversity recognized
- Individuals upskilled

By 2028: The Philippine creative ecosystem is strengthened through capacity building and digital transformation, setting a solid foundation for growth.

Values
- Diversity
- Creativity
- Cultural sensitivity
- Collaborative *(Bayanihan)*
- Empathy (*Malasakit*)
- Mutual trust

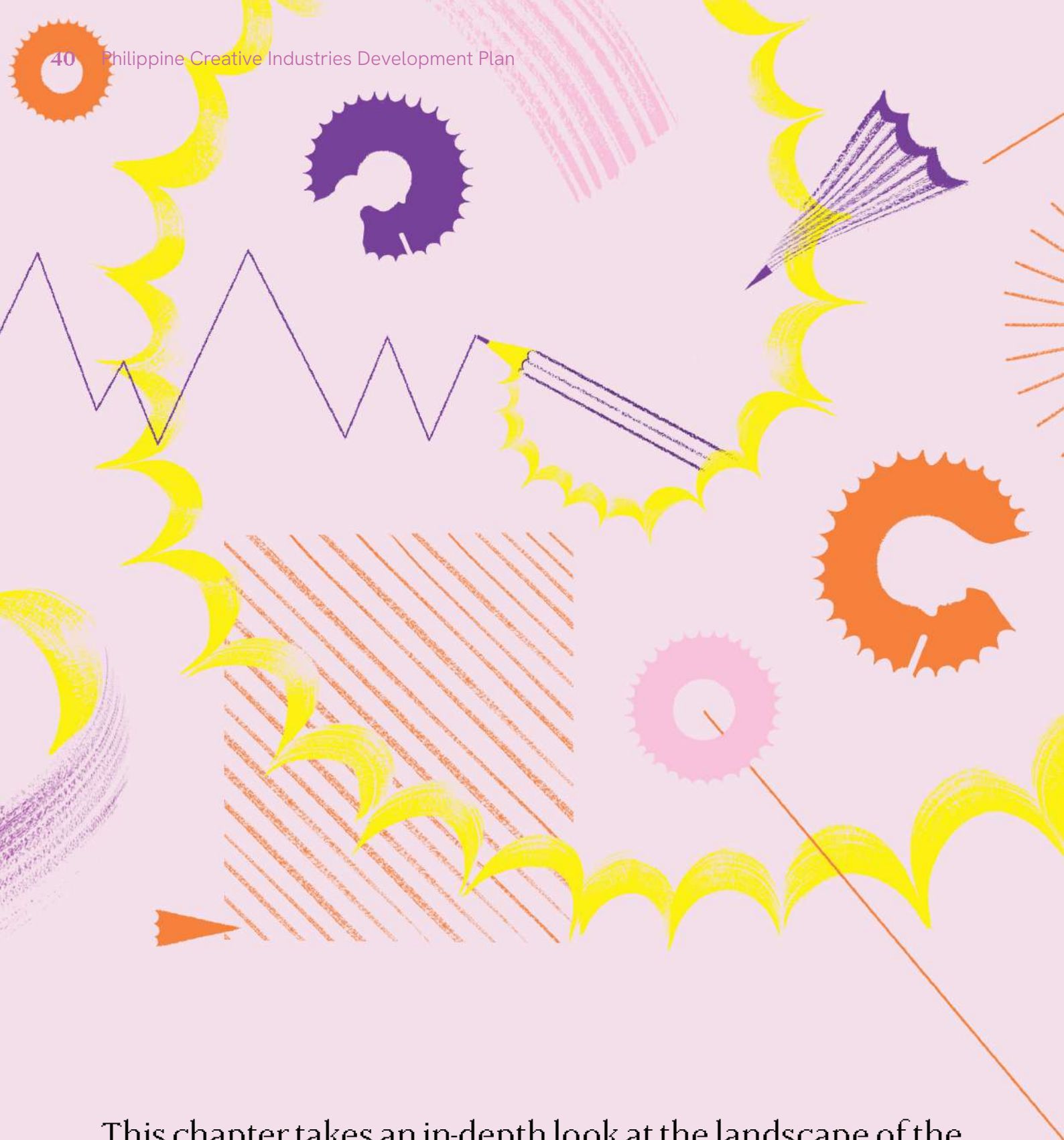
Powered by culture as...
- A foundation of society
- An economic sector
- An enabler of sustainable development and innovation





2

Sketching the Philippine Creative Canvas



This chapter takes an in-depth look at the landscape of the Philippine creative industries—their make, size, strengths, and challenges. It presents a profile of the different domains to paint a picture of how these dynamic ecosystems operate and navigate change. Lastly, it identifies areas for development as informed by research and consultations with sector representatives.

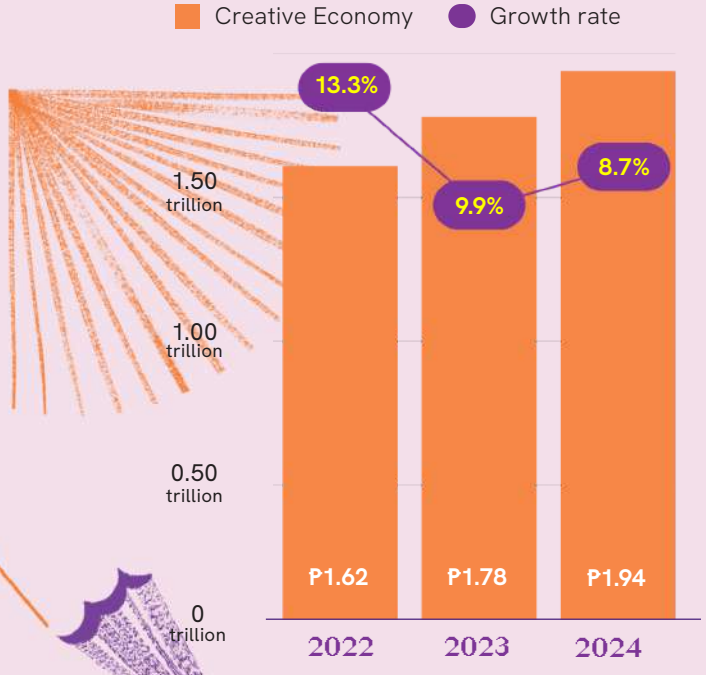
The Philippine creative industries are defined by cultural diversity, global connections, and an ambition for a better life.

These factors inspire artistic expression, creative production, and value creation. However, the landscape also faces key challenges in job protection, professional growth, market development, and business scalability.

With a 7.3% contribution to the country's GDP, the creative industries are key drivers of jobs, value creation, and socio-economic transformation. In 2024, they generated PhP 1.94 trillion of the GDP, registering an 8.7% increase in their recorded value from 2023 (see Figure 2).[1]

Figure 2

Gross Value Added of Creative Economy: 2022-2024
(PhP Trillion)



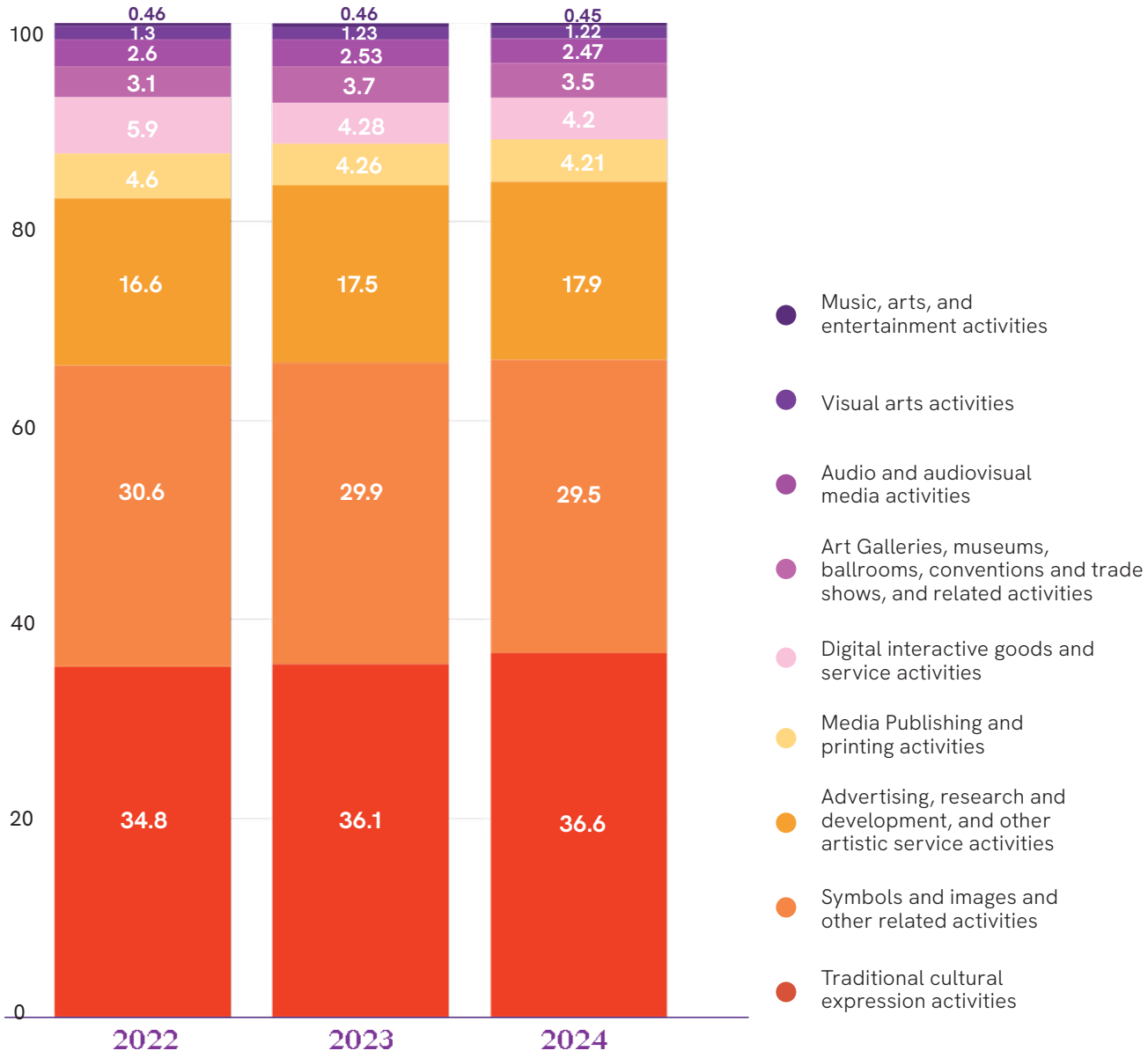
Source: PSA, "Philippine Creative Economy" (2024). Reformatted for presentation.

1 Philippine Statistics Authority, "Philippine Creative Economy Expands by 8.7 Percent in 2024, Accounted for 7.3 Percent of Gross Domestic Product. " March 20, 2025

In 2024, the creative industries saw a significant uptick in employment, boasting a workforce of 7.51 million individuals—an impressive 3.9% increase from the previous year's 7.23 million. Among the various sectors within these industries, traditional cultural expression activities (such as arts and crafts, food and gastronomy, culinary practices, festivals, and celebrations) commanded the largest share at 36.6% (see Figure 3).

Figure 3

Percent Distribution of Employment in Creative Economy, by Industry: 2022-2024



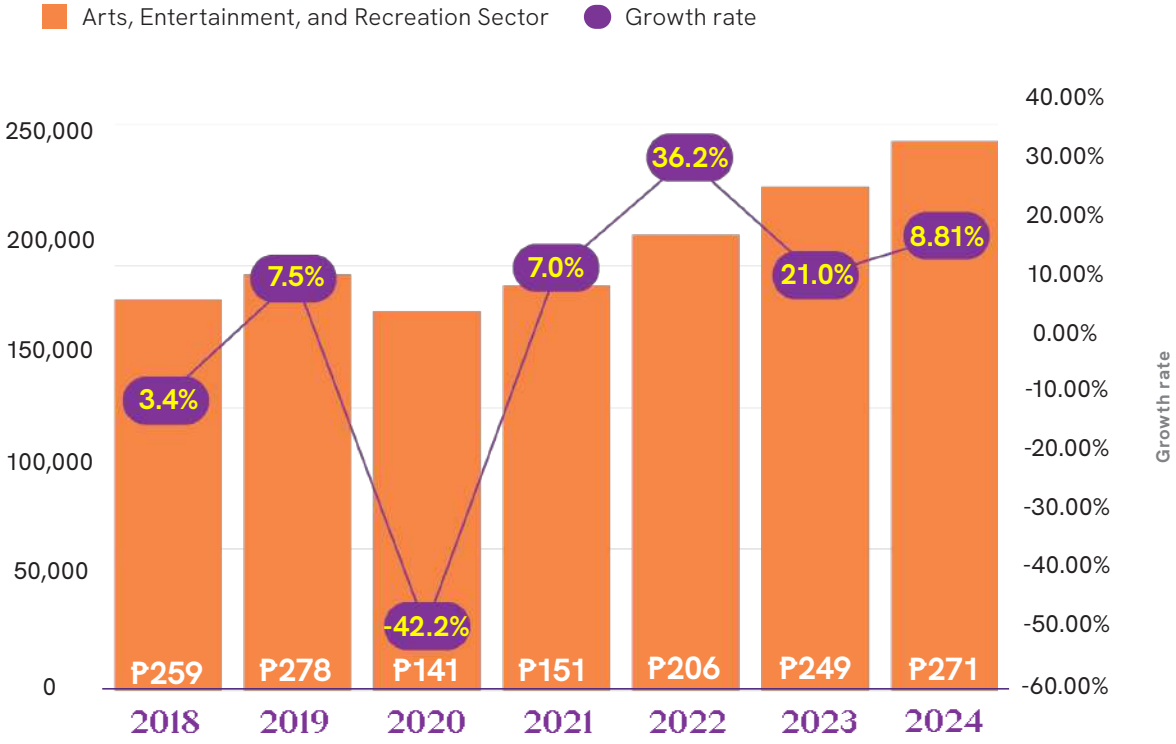
Source: PSA, "PHILIPPINE CREATIVE ECONOMY" (2025). Reformatted for presentation.

In particular, the arts, entertainment, and recreation sector ranked as the second-fastest-growing economic sector in the country in 2023. This domain was the first to be hit by the pandemic and the last to recover from its effects. In 2024, the sector experienced a remarkable 8.81% growth, indicating renewed prospects for the industry (see Figure 4).

Figure 4

Annual GVA and Growth of the Arts, Entertainment, and Recreation Sector

(PHP Thousand)



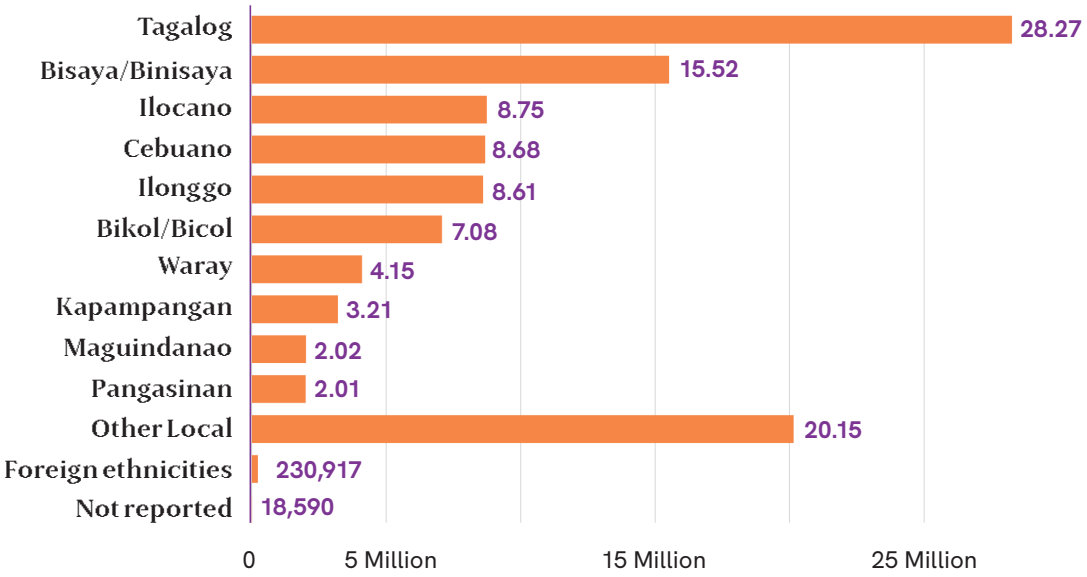
Source: PSA, "PHILIPPINE CREATIVE ECONOMY," 2024 AND PSA, "PHILIPPINES PSNA 5TH REVISION 2000-2024."
Reformatted for presentation. Numbers are rounded to the nearest approximate.

Ethnic groups across the country, such as Tagalog, Bisaya, Ilocano, Cebuano, and Ilonggo, among others, inspire fascinating stories, designs, traditions, and other creative content—many of which are still waiting to be discovered (see Figure 5).

Figure 5

Ethnic Groups in the Philippines, 2020

(Million)



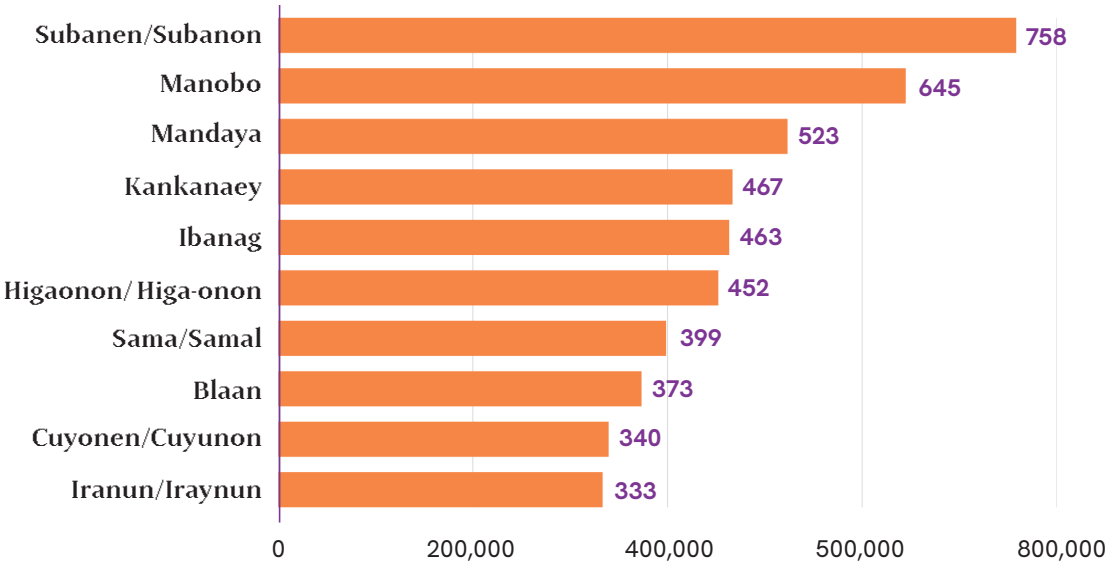
Source: PSA, "2022 CENSUS OF POPULATION AND HOUSING." REFORMATTED FOR PRESENTATION. NUMBERS ARE ROUNDED TO THE NEAREST APPROXIMATE.

Indigenous Peoples such as the Subanon, Manobo, Mandaya, Kankanaey, and Ibanag, among others, possess unique cultural knowledge, traditional practices, and artistic expressions that serve as rich sources of inspiration for various creative endeavors (see Figure 6).

Figure 6

Top 10 Indigenous Peoples in the Philippines, 2020

(Thousand)



Source: PSA, "2022 CENSUS OF POPULATION AND HOUSING." REFORMATTED FOR PRESENTATION. NUMBERS ARE ROUNDED TO THE NEAREST APPROXIMATE.







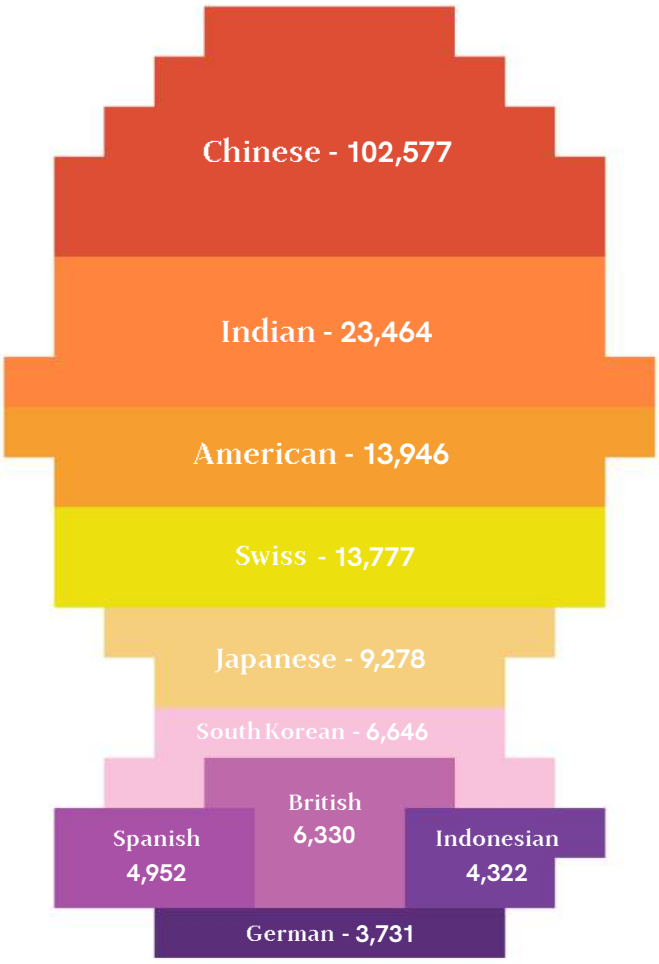


From Top to Bottom:
Hudhud chants of the Ifugao (inscribed in 2008), Darangen epic of the Meranaw people of Lake Lanao (inscribed in 2008), Buklog thanksgiving ritual system of the Subanen (inscribed in 2019), and Aklan piña handloom weaving (inscribed in 2023) are all included in the Philippine list of UNESCO intangible cultural heritage of humanity.

Recognizing and valuing the contributions of Indigenous Peoples in creative industries is essential for promoting cultural diversity and social inclusion. Ethnic groups have their own distinct language, cuisine, and cultures. They express traditions through various celebrations and festivals, which often serve to honor religious figures or commemorate community narratives. The National Commission for the Culture and the Arts (NCCA) records at least 1,138 major and minor festivals being celebrated all over the country all throughout the year. For example, the Sinulog Festival in Cebu City pays homage to the Señor Santo Niño,[2] while the MassKara Festival in Bacolod, originating in 1980, stands as a resilient response to adversity.[3] Chinese, Indian, and European ancestry, among others, stimulate hybrid cultural expressions within the country (see Figure 7).

Figure 7

Top Ten Foreign Ethnicities in the Philippines, 2020



Source: "2022 Census of Population and Housing." Reformatted for presentation. Numbers are rounded to the nearest approximate.

2 Pia Piquero, "'Sinulog sa Sugbo': Then and Now, the Birth of Cebu's 'Queen of all Festivals,'" *Cebu Daily News*, January 18, 2024, https://cebudailynews.inquirer.net/551386/then-and-now-the-birth-of-sinulog-sa-sugbo

3 Christine Cudis, "The History Behind Bacolod's 'Smile'," *Philippine News Agency*, October 2, 2019.

THE CREATIVE DOMAINS

The government has been commissioning industry studies and roadmaps across the Philippines' creative industries. Through these, we captured critical data that allowed us to trace economic value chains and understand their production, distribution, and consumption processes, identify opportunities for their growth and development, and inform directions of the Plan.

UNESCO Cultural Cycle

In analyzing the creative industries, we also refer to the cultural cycle (see Figure 8), to better understand how value is created through five interconnected phases[4]:

Phase 1: Creation

This phase involves generating expressions such as literature, music, digital art, and multimedia. It reflects a broad spectrum of human creativity and diversity, including traditional, digital, and cross-disciplinary forms.

Phase 2: Production

Creative expressions are then transformed into both physical and digital goods and services, such as films, e-books, virtual reality experiences, and performances. This phase supports economic growth and entrepreneurship, and is greatly influenced by technological advancements.

Phase 3: Distribution

Distribution pertains to ensuring that goods and services are widely available and accessible to audiences and various markets. It includes managing supply chains, coordinating with retailers, and ensuring that products like books reach bookstores, or that films are available in cinemas across the world.

Phase 4: Delivery/Transmission

This phase focuses on the specific methods of making products directly accessible to end-users. It includes streaming movies on digital platforms, purchasing books from bookstores, or viewing digital art online.

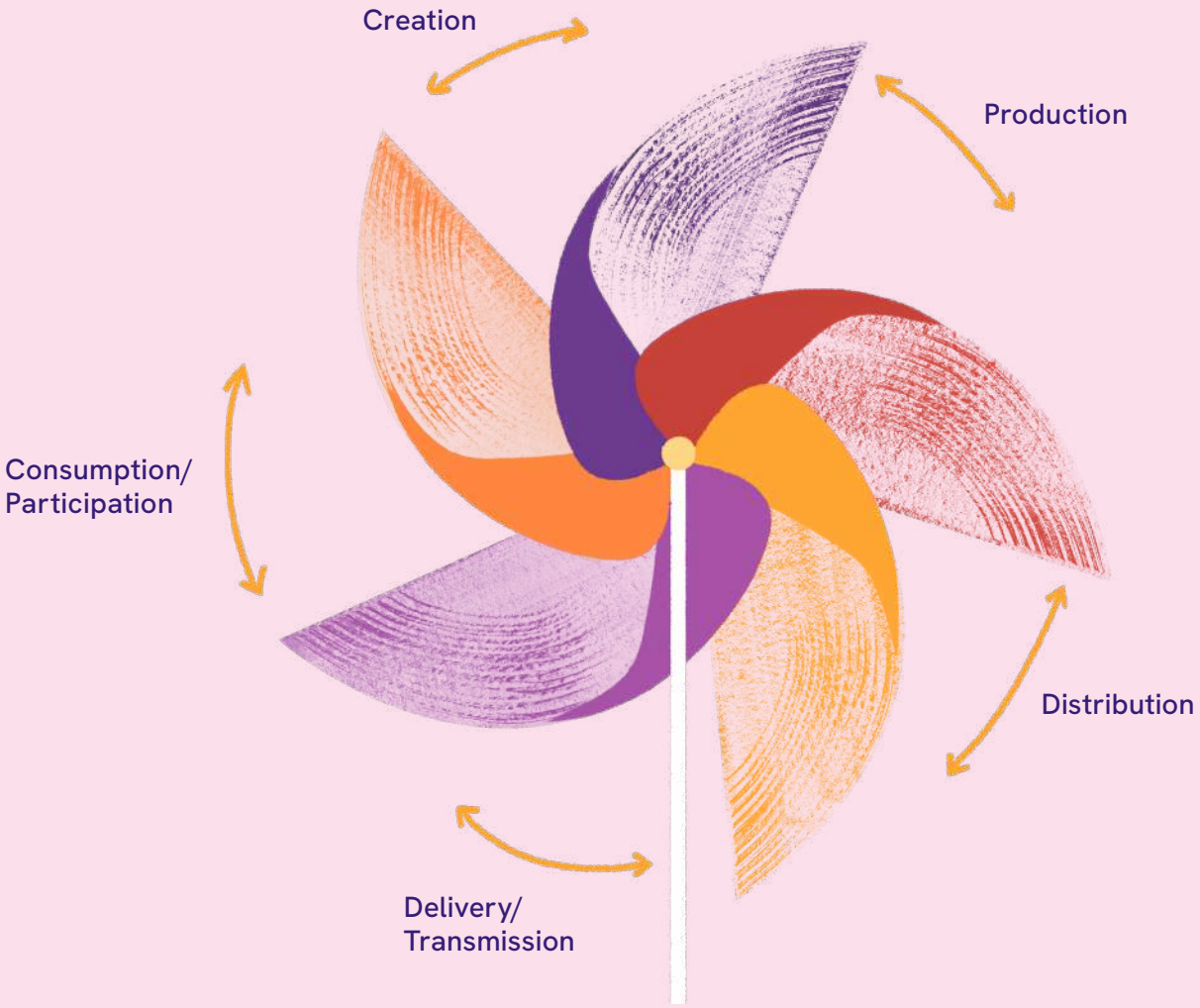
Phase 5: Consumption/Participation

This phase involves deriving meaning, enjoyment, and inspiration from experiences, such as attending events, visiting heritage sites, and interacting with digital and physical artifacts. It plays a critical role in identity building, cultural participation, and social cohesion.

4 UNESCO Institute of Statistics, *2009 UNESCO Framework for Cultural Statistics*, 2009.

Figure 8

The UNESCO Cultural Cycle



Source: UIS, 2009 UNESCO FRAMEWORK FOR CULTURAL STATISTICS, 2009. Reformatted for presentation.

Understanding value chains through this framework allows us to identify which phases require support. For example, if **Distribution** is weak, strategies can be developed to improve market access for products, which include the nine creative domains of the Philippine creative industries.

Table 1

The Nine Domains and Sectors of the Philippine Creative Industries

PCIDA classifies the creative industries into nine domains,[5] each consisting of various creative sectors (see Table 1).

DOMAIN	
1. Audiovisual Media	• Film • Broadcasting Content and Production • Animated Film Productions • Vlogs
2. Digital Interactive Media	• Software and Mobile Applications • Video Games • Computer Games
3. Creative Services	• Advertising and Marketing • Creative Research and Development
4. Design	• Architecture • Urban Landscaping • Environmental Planning
5. Publishing and Printed Media	• Books and Textbooks • Blogs • Comics
6. Performing Arts	• Live Music • Theater • Musical Theater
7. Visual Arts	• Paintings • Drawings • Sculptures
8. Traditional Cultural Expressions	• Arts and Crafts • Food and Gastronomy
9. Cultural Sites	• Galleries and Museums • Libraries

5 This classification is mostly based on the UNCTAD creative economy report and further updated to fit local contexts and emerging practices. United Nations Conference on Trade and Development, *Creative Economy Report 2008: The Challenge of Assessing the Creative Economy toward Informed Policy-Making* (New York: United Nations, 2008).

SECTORS		
	• Recorded Music • Music Score • Motion Graphics • 2D and 3D • Design Technology • Animatronics	• Composition for recording • Podcasts • Entertaining Audio or Audiovisual Material Content developed for educational purposes or Edutainment Content
	• Digital Content Streaming Platforms • Mobile Games • Virtual, Augmented, or Mixed Reality Games	• Digitized Creative Content • Web Design and User Experience/ User Interface
	• Cultural and recreational services • Live creative experience	• Communication and Graphic Design
	• Interior and Spatial Planning • Product Design • Fashion and Accessory making • Textile Development	• Furniture making • Jewelry making • Toy making
	• Graphic Novels • Physical Print • Editorial and Commentaries	• Magazines • Newspapers • Other Published Media
	• Dance • Live Events • Opera • Circus	• Spoken Word • Puppetry • Cinema and Movie Theater
	• Photography • Antiques • Performance Arts	• Art Toys • Collages • Other decorative materials
	• Culinary Practices • Cultural Festivals	• Celebrations • Cultural Education
	• Creative Cities • Performing Arts Venues	• Cultural Exhibitions • Heritage Sites
Other such domains and industries as may be determined		

Source: REPUBLIC ACT NO. 11904, (2022).



A screengrab from Hello, Love, Again (2024) featuring Kathryn Bernardo and Alden Richards. The film has officially become the highest-grossing Filipino movie of all time, surpassing P1.4 billion in worldwide box office earnings—a ground-breaking achievement in Philippine cinema.

Audiovisual Media

Tuning into the future

FILM

The Philippine film industry is characterized by its adaptability and resilience. Despite economic and structural challenges, Filipino filmmakers continue to produce high-quality content, often achieving international recognition. The industry has a robust pool of creative professionals who thrive on both traditional and digital platforms. The Film Development Council of the Philippines' (FDCP) active engagement and support, including various incentive programs and collaborations with foreign producers, highlight the industry's potential for further growth and development. The presence of strong support industries ensures access to the latest technology and high-quality production equipment.

The film industry in the Philippines is a vital component of the country's creative economy, employing over 5,900 individuals as of 2018.[6] The industry includes the production of theatrical and non-theatrical motion pictures, post-production activities, distribution, and projection. The total income of firms in the film industry has shown growth, although at varying rates across sub-sectors. For instance, the Motion Picture, Video, and Television (MPVT) Distribution Activities grew the fastest from 2012 to

6 Department of Trade and Industry–Competitiveness and Innovation Group,"Strengthening the Creative Industries in the Philippines: The Case of the Film Industry" (unpublished manuscript, Department of Trade and Industry, 2022).

2018 with a compound annual growth rate (CAGR) of about 14.7%, while MPVT Program Production Activities only grew by 0.45% annually. The total box office receipts saw fluctuations, peaking at USD160 million in 2014 and dropping to USD80 million in 2016, with a slight recovery to USD120 million in 2018.

The film industry benefits from an expanding market through direct exports, demonstrating the quality and competitiveness of its services. The notable quality of independent films, evidenced by the higher proportion of Grade A movies recognized for their outstanding quality, alongside strong support industries such as camera rentals and business services, further bolsters the industry with world-class services and equipment.

Despite these strengths, the industry faces challenges such as slow growth, limited competition in key segments, limited negotiating power of audiovisual performers, and a disproportionate share of foreign films in the market. Data from the Movie and Television Review and Classification Board (MTRCB) between 2013 and 2020 show that foreign films consistently outnumbered local productions. In 2013, 275 out of 489 reviewed films were foreign, while only 214 were local. Similarly, in 2015, foreign films accounted for 427 out of 662 total reviews, compared to 235 local films. The latest available data from 2020 reported 92 foreign films versus 75 local films. Low R&D expenditure and inadequate data monitoring of production stages, coupled with financial constraints and double taxation on box office earnings, further hinder international market expansion.

Furthermore, Filipino audiovisual performers are in a weak bargaining position when negotiating the terms of their contracts. Thus, they receive low to no remuneration for future broadcasts or public availability of their performances. Opportunities lie in the digital media landscape, with the increased use of digital platforms by distributors and growing international recognition of Filipino content. However, threats include the disruptive impact of digital media on traditional distribution channels, the marginalization of smaller independent filmmakers, declining film-related expenditures, and the rising penetration of foreign, particularly Korean, content into the local market.

Recommendations for Development

- Increase investments in innovation, equipment, and global marketing within the film industry to produce high-quality films that resonate with regional or global audiences.
- Professionalize the job structure in the industry, ensuring film workers are upskilled, protected, and properly compensated.
- Intensify efforts to combat piracy by shutting down websites that host pirated films. This will protect the revenue of local filmmakers and encourage more investments in film production.
- Revise the tax structure to ease the financial burden on film producers. Reducing or eliminating excessive taxes on the film industry can incentivize more productions. Consider reintroducing amusement tax incentives for films rated A or B by the Cinema Evaluation Board.
- Implement policies that ensure minimum screening days for domestic films in theaters. This can help increase the visibility of local films and encourage more Filipinos to watch them.



Screengrab from *FPJ's Ang Probinsyano*, a teleserye based on the 1996 box office hit of the same name. The series, featuring multi-awarded cast members Coco Martin and Susan Roces, aired from 2015 to 2022 and became the Philippines' longest-running action-drama television series due to its consistently high ratings.

BROADCASTING CONTENT AND PRODUCTION

The dual nature of traditional dominance and digital transition characterizes the Philippine broadcasting industry. While television and radio maintain their supremacy in rural areas due to socioeconomic factors, there is a burgeoning shift toward digital platforms, especially in urban settings. The industry showcases a blend of local cultural content and global influences, making it a unique media landscape. Moreover, the high audience engagement with local television shows, radio programs, and digital news indicates a culturally ingrained consumption pattern.

The broadcasting content and production industry, encompassing television, radio, and print media, plays a significant role in the country's creative sector. In 2020, the combined income of these industries accounted for about 17.60% of the creative industries and 0.99% of the total GDP. Specifically, television accounted for 5.11% of the creative industries and 0.29% of GDP, radio for 0.44% of the creative industries and 0.03% of GDP, and printed media for 12.05% of the creative industries and 0.68% of GDP. The sector includes 588 television stations, 1,642 cable television stations, 419 AM radio stations, and 1,214 FM radio stations nationwide. The industry provides a source of employment, with 75.35% of workers in Luzon, 12.65% in Visayas, and 12.00% in Mindanao as of April 2020.[7]

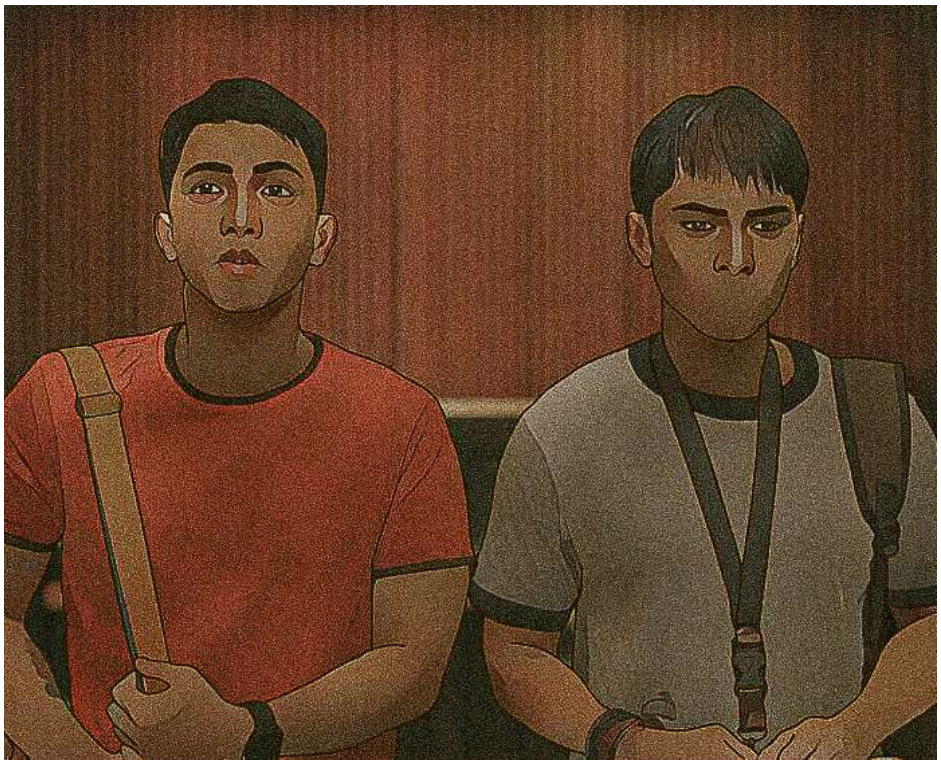
7 Department of Trade and Industry–Competitiveness and Innovation Group, "A Background Study on the Television, Radio, and Printed Media Industries" (unpublished manuscript, Department of Trade and Industry, 2022).

The industry boasts high market penetration and resilience, with television as the most trusted medium, capturing significant audience attention during primetime, while radio maintains a strong presence in rural areas.

The industry's established infrastructure and strong brand recognition of major players provide a stable foundation. However, challenges like high ownership concentration, which limits competition and innovation, the decline in print media readership, and the high cost of internet access hinder digital transition. Significant opportunities lie in digital broadcasting and content distribution, spurred by increasing mobile and internet usage, along with government initiatives to improve internet infrastructure. Despite these opportunities, the industry faces threats from rapid digital transformation, the dominance of foreign content through streaming platforms, and economic constraints affecting smaller players.

Recommendations for Development

- Increase support for local content creation through grants and incentives. This can help diversify programming and ensure local culture and stories are well-represented in the media.
- Work with the government to enhance internet accessibility and affordability. Improved digital infrastructure can support the growth of digital broadcasting and content distribution.



The Missing (Ilocano: *Iti Mapukpukaw*) is a 2023 Filipino adult animated science fiction film, written and directed by Carl Joseph Papa. On September 29, 2023, the Film Development Council of the Philippines and the Film Academy of the Philippines announced that *The Missing* would be the country's entry for the Best International Feature Film category at the 96th Academy Awards. This marks the first time the Philippines has submitted an animated film for this category.

ANIMATED PRODUCTIONS

The animation services sector in the Philippines is marked by its dynamic evolution from supporting roles to taking on more sophisticated tasks. Initially focused on post-production and production phases, Filipino animators have increasingly moved into original content creation. This shift is bolstered by significant investments from large entertainment companies like Netflix and Amazon Prime, leading to a surge in offshored animation projects post-COVID-19. The sector integrates and reflects a blend of traditional hand-drawn animation with advanced 3D and VFX services. The Philippines also benefits from a large, English-proficient talent pool and cost-effective service delivery, making it an attractive offshoring destination for global animation projects.

The animation services sector in the Philippines is a growing part of the creative industries, employing many individuals and expecting to add about 7,500 new jobs by 2028. Projected revenue is set to reach USD 141.1 million by 2028, with a CAGR of around 10% from 2023 to 2028. The industry is primarily composed of small to medium-sized enterprises. Key players include animation studios and individual artists, focusing increasingly on sophisticated tasks like 3D animation and VFX alongside traditional hand-drawn animation.[8]

8 Animation Council of the Philippines, Inc., "The Big PH IT-BPM Leap: ACPI Roadmap 2028" (unpublished manuscript, Animation Council of the Philippines, Inc., 2023).

Undoubtedly, the sector is bolstered by a high quality of talent, with skilled animators proficient in various aspects of animation and cost-effective services that make it a preferred offshoring destination. Supported by robust IT-BPM infrastructure and a strong affinity with Western culture, the sector ensures seamless communication and project execution. However, weaknesses include limited access to funding, skill gaps in higher-order tasks, and infrastructure constraints, with most activities concentrated in Metro Manila. Opportunities abound with the rise of digital media and streaming services, cross-country collaborations, and the growth of 3D animation and VFX segments. Despite these prospects, the sector faces threats from economic downturns affecting consumer spending, widespread piracy, weak intellectual property rights protection, and brain drain due to skilled animators migrating to higher-paying jobs overseas. Furthermore, the wages and rates among animators vary widely and while there is much original content in the country, public appreciation and following have remained generally low.

Recommendations for development

- Provide incentives and grants for the development of original creative content.
- Invest in training programs to upgrade the skills of animators, focusing on high-demand areas such as 3D animation, VFX, and pre-production services.
- Encourage collaboration between animation studios, government agencies, and educational institutions to develop industry-relevant curricula and provide hands-on training opportunities.
- Provide financial incentives and grants to support local studios, particularly MSMEs, in producing original content.
- Streamline access to funding and explore public-private partnerships to reduce financial barriers for content creation and technological upgrades.
- Invest in high-speed broadband and reliable digital infrastructure to support remote work and attract global clients.



Filipino actress and singer Belle Mariano performs "*Anong Daratnan*," the Filipino version of the special end-credit song for Disney's *Moana 2*.

MUSIC

The Philippine music industry is characterized by its high engagement with digital platforms and the significant presence of self-employed or freelance musicians. The industry's cyclic model showcases the interconnectivity of creation, production, distribution, and consumption stages, highlighting the complex network of stakeholders involved in music production and distribution.

The music industry in the Philippines is a vibrant sector with significant potential for growth. Filipinos lead the world in daily music listening time, averaging 126 minutes per day. Despite this high engagement, the industry still has considerable room for development. According to the International Federation of the Phonographic Industry's (IFPI) Global Music Report 2024, the Philippines music industry ranked 34th globally.[9] The report highlighted that the market size stands at USD 77.1 million, with a growth rate of 10.77% in 2023, down from an impressive 55.84% in 2022. Additionally, in 2023, the music streaming sector dominated the industry, accounting for 90.1% of recorded music revenues, which translates to USD 69.5 million.

9 International Federation of the Phonographic Industry (IFPI), Global Music Report: State of the Industry (IFPI, 2023).

The country's rich cultural heritage and diversity fuel creativity among Filipino musicians, fostering talent both locally and internationally, particularly among Overseas Filipino Musicians (OFMs). However, low appreciation of culture and the arts, inadequate audience development, and lack of collaboration between private companies and government agencies hamper growth. Many artists face financial insecurities due to irregular income and the high costs of formal music education. Opportunities arise from the massive online user base for digital music distribution, the emerging trend of hyper-localism, and the global recognition of Filipino talent, which presents chances for international collaborations and market expansion. Conversely, challenges include high consumption of international music, such as K-pop, competing with OPM, and the potential entry of new players from other Asian countries following successful industrial policy models, posing a threat to the local market.[10]

Recommendations for development

- Create institutional mechanisms to coordinate efforts and address challenges in the Philippine music industry.
- Boost financial support through grants, loans, and investment incentives to strengthen artist development and promotion.
- Promote music education and events to develop a strong audience base and engage younger generations.
- Leverage digital platforms for music distribution and innovation to increase the global accessibility of Filipino music.

10 Department of Science and Technology–National Research Council of the Philippines, "MusikaPilipinas Policy Brief" (unpublished manuscript, Department of Science and Technology, 2023).

Digital Interactive Media

Crafting game-changing, interactive worlds

Filipino software developers excel in creating tailored solutions for diverse global markets, leveraging strong cultural affinity and English proficiency. The industry benefits from a supportive ecosystem that includes numerous tech startups, established multinational companies, and government-backed initiatives fostering innovation and growth. Furthermore, the industry's focus on developing niche technologies such as AI, blockchain, and cybersecurity highlights its commitment to staying at the forefront of technological advancements.

The software development industry in the Philippines is a critical component of the country's IT-BPM sector. As of 2020, the industry employed approximately 190,000 professionals and contributed around PHP 152 billion to the economy. The sector includes a wide range of services, such as software development, IT consulting, system integration, and managed services. The industry has experienced significant growth, with a CAGR of 7.1% from 2016 to 2020. Export revenues from software development are a substantial part of the industry's income, with North America and Europe being the major markets.

The Philippines' young, English-speaking workforce, competitive labor costs, and strong IT infrastructure, bolstered by government incentives, make the country a prime location for offshore software development. Challenges include a shortage of skilled professionals in advanced technologies, reliance on foreign software,



The *High Times* game, created by Danni Ann Taylan, co-founder of Yangyang Mobile, was named the winner in the Game Development category of the 2024 Young Creatives Challenge (YC2). With 579 entries from across the country, the competition celebrated the exceptional talents of Filipino creatives in Songwriting, Screenwriting, Playwriting, Graphic Novels, Animation, Game Development, and Online Content Creation. This initiative, part of the Malikhaing Pinoy Program of DTI, was established in collaboration with the Office of Senator Imee Marcos.

inadequate training programs, and infrastructure gaps outside urban areas. Opportunities arise from the global push for digital transformation, emerging technologies like AI, blockchain, and Internet of Things (IoT), and regional expansion through the ASEAN Economic Community. Threats involve competition with India and Vietnam, economic uncertainties, political instability, and the need for continuous upskilling to keep up with technological advances.

Recommendations for development

- Enhance education and training programs to provide skilled professionals with updated curricula and hands-on opportunities.
- Encourage innovation and entrepreneurship with government grants and startup support.
- Invest in infrastructure improvements outside major urban centers to aid software development firms.
- Promote the Philippine software industry internationally through trade missions and global tech events.
- Strengthen cybersecurity by implementing stricter data protection regulations and offering specialized training for professionals.

VIDEO GAMES

The Philippine game development industry stands out for its strong focus on external development services, which account for over 90% of its revenue. Local studios excel in game art asset development, full-service game development, and game programming. The industry's familiarity with both Eastern and Western cultures uniquely positions it for effective game localization services. Furthermore, the industry's structure is characterized by a high concentration of small studios, with most companies employing fewer than 30 full-time employees. This structure promotes a collaborative environment and allows for flexibility in project management.

The game development industry in the Philippines is a growing sector within the broader creative industries, with significant potential for expansion. As of 2020, the industry produced approximately 1,000 original games, contributing USD 1.38 million in revenue, which constitutes 0.26% of total global game revenue. Furthermore, the industry recorded USD 150 million in revenue from external development services. This sector employs around 4,000 full-time employees, with an additional 6,000 independent contractors engaged in local or foreign outsourcing. The highest concentration of game companies is in the NCR, with 384 studios, followed by Bacolod, Baguio, and Naga.[11]

The Philippine game development industry excels due to its talented developers, who contribute to AAA games like *God of War* and *The Witcher,* while also providing effective localization services. However, the industry's reliance on inexpensive external services has resulted in low wages and hindered skill development. Challenges include ensuring project continuity, limited R&D, and restricted access to capital. Growth opportunities exist in developing AA and AAA games, expanding into game porting, technical artistry, and advanced programming, and leveraging certification programs. Threats include competition from Eastern Europe and Southeast Asia, brain drain due to higher foreign salaries, and the increase in remote work opportunities since the COVID-19 pandemic.

Recommendations for development

- Increase government funding and support for original game IP development with grants and loans.
- Expand technical training and certification courses in game development with international collaboration.
- Invest in high-speed internet and provide access to industry-standard tools for game studios.
- Encourage the development of local market-focused games and promote Filipino cultural themes to attract wider audiences.
- Foster international partnerships for co-development and exposure to advanced techniques.

11 Department of Trade and Innovation Group, "Game Development Roadmap" (unpublished manuscript, Department of Trade and Industry, 2023).

Creative Services

Boosting stories with a Filipino flair

ADVERTISING AND MARKETING

The Philippine advertising industry is uniquely positioned with a strong focus on social media and mobile advertising, driven by one of the highest social media usage rates globally. Its adaptability to emerging technologies and trends, such as AI and programmatic advertising, sets it apart from others. Furthermore, the local market's cultural affinity for storytelling and creative expression enhances the effectiveness of advertising campaigns. The industry's structure is characterized by a mix of large multinational agencies and a vibrant ecosystem of MSMEs, fostering innovation and diversity in advertising strategies.

The Philippine advertising industry has shown resilience and adaptability, with digital advertising generating USD 1.2 billion in 2021, up from USD 576 million in 2017. Expected to reach USD 1.44 billion by 2025, it has a CAGR of 12.1%. Social media advertising is crucial, capturing 50.2% of new brand discoveries among internet users aged 16-64. Mobile devices account for 51.3% of web traffic, highlighting the importance of mobile-centric strategies. The sector benefits from a tech-savvy population, with over 70% internet penetration and an average daily internet usage of 9 hours and 45 minutes.[12]

The Philippines' young, tech-savvy population and high internet usage drive strong engagement with digital platforms, propelling digital advertising forward. The industry's adaptability to new technologies, such as AI, enhances its competitive edge. However, slow internet outside urban areas and a talent gap in AI and digital marketing pose challenges, alongside financial constraints from undervaluing digital work. Opportunities exist in the growing demand for digital advertising, the rise of mobile and social media platforms, and the expansion of e-commerce. Threats involve high competition, data privacy concerns, regulatory requirements, economic uncertainties, and policy changes.

12 Department of Trade and Industry–Competitiveness and Innovation Group, "State and Prospects of the Digital Advertising Industry in the Philippines" (unpublished manuscript, Department of Trade and Industry, 2022).

Recommendations for development

- Invest in improving internet infrastructure, particularly in rural areas, to support the growth of digital advertising.
- Implement training programs to bridge the talent gap in digital marketing, AI, and big data analytics.
- Develop and enforce regulations to address data privacy and ensure ethical advertising practices.
- Provide financial incentives and support for startups and MSMEs to foster innovation in the advertising sector.

COMMUNICATION AND GRAPHIC DESIGN

The Philippine graphic design industry is marked by its integration of local cultural elements into modern design, creating a unique blend that is both innovative and expressive of Filipino identity. Filipino designers are known for their adaptability, often handling multiple roles and responsibilities beyond traditional design tasks. This flexibility enables them to meet the evolving demands of the industry. The strong local networks and community support among designers foster a collaborative environment that enhances creativity and resource sharing. Furthermore, the affordability of Filipino designers makes them attractive to international clients, allowing them to compete globally while maintaining high-quality standards.

The graphic design industry in the Philippines is a dynamic and growing sector. In 2020, graphic and multimedia design comprises 5% of all design-intensive occupations.[13]

13 Design Center of the Philippines, *Making Design Count: The Value and Impact of Design on the Philippines Economy* (Manila: Design Center of the Philippines, 2023).

Filipino graphic designers are recognized for their affordability, adaptability, and ability to meet international standards, making them globally competitive. Out of 1.8 million freelancers in the country, graphic design accounts for 10.96% of most awarded job types.[14]

However, this only covers job descriptions in graphic design, Photoshop, Illustrator, and logic design. Challenges arise from the loose definition of graphic design, creating pressures to expand beyond traditional roles to meet demands, such as photography, art direction, project management, brand marketing, print production, copywriting, User Interface (UI) / User Experience (UE) design, and web development. Additionally, the digital economy calls for proficiency in emerging software programs, advanced techniques, and trends, alongside increased participation in the gig economy.[15] Indeed, the term 'graphic design' limits the scope of competencies of Filipino designers in this line of work, hence the industry term 'communication design' emerged.

Recommendations for development

- Enhance access to advanced graphic design training through partnerships with educational institutions and online platforms.
- Create mechanisms to standardize rates and strengthen the protection of designer's intellectual property rights.
- Foster collaboration between graphic designers and other creative industries to leverage shared resources and expertise.
- Develop project management and communication skills among designers to improve client relationships and negotiations.
- Utilize digital and social media platforms to increase the global visibility and accessibility of Filipino graphic design work.

14 Department of Trade and Industry-Competitiveness and Innovation Group,"Pixel-Focused Pathways: Philippine Graphic Design Industry Roadmapping Initiative" (unpulished manuscript, Department of Trade and Industry, 2023).
15 DTI-CIG, Pixel-Focused Pathways.

Design

Elevating innovation through heritage

FASHION AND TEXTILE DEVELOPMENT

The Philippine fashion and textile industry is characterized by its strong emphasis on cultural conservation and sustainability. It excels in producing high-quality, artisanal products using traditional techniques. Integrating modern design and technology with traditional practices, the industry creates unique and innovative products that appeal to local and international markets. Dominated by MSMEs and cottage industries, the industry's structure fosters a collaborative and flexible environment, enabling quick adaptation to market trends and consumer preferences.

The fashion and textile industry in the Philippines is undergoing a transformative phase, driven by a comprehensive roadmap aimed at fostering sustainable growth, innovation, and global competitiveness. In 2023, the industry contributed approximately PHP 35.55 billion to the Philippine economy, reflecting a decrease from the previous year. The garment sector alone generates around USD 1 billion in exports annually, employing over 490,000 workers, 69.4% of whom are women. Despite a decline in the number of enterprises, the industry remains a vital part of the economy, with more than 200 manufacturers and 240 traders. The local demand for garments, such as clothing and footwear, is projected to double by 2028, reaching USD 10.2 million.[16]

The Philippine fashion and textile industry thrives on its rich cultural heritage, diverse traditional textiles, and skilled English-speaking workforce, making it competitive in high-end markets. Government support through initiatives like the Philippine Tropical Fabrics Law and training programs further boosts growth prospects. However, the industry faces challenges, such as reliance on imported raw materials, outdated equipment, high production costs, and a shortage of skilled workers, particularly in textile design and garment production. Opportunities include the growing global demand for sustainable and ethical fashion, innovations in natural fibers like abaca and pineapple, and new e-commerce channels for reaching international markets. Additionally, the purchasing power

16 Department of Trade and Industry–Competitiveness and Innovation Group, "Fashion and Textile Roadmap: Weaving Dreams for the Future" (unpublished manuscript, Department of Trade and Industry, 2023).



The Spiderlily Collection, designed by Bea Valdes and manufactured by Valdes Designs x BAYO, is inspired by the bakong plant and showcases the shared commitment of enterprises to uplift communities and support environmental regeneration. The collection features multifunctional pieces: a bulbous-shaped jacket and a sleek top that transform into bags, and cargo pants that convert into shorts. These garments are crafted from upcycled fabrics sourced from the workshops of Bea Valdes and BAYO, along with a bakong-cotton fabric blend woven by BAYO Foundations partner handloom weaving community.

of the diaspora community presents a significant market. Threats include the influx of inexpensive imports, high energy costs, logistical challenges, and disruptions from the COVID-19 pandemic, highlighting the need for resilience and adaptability.

Recommendations for development

- Increase financial support through grants and incentives to help MSMEs adopt advanced technologies, implement sustainable practices, and market their products to larger domestic, regional, and global markets.
- Implement targeted training programs in collaboration with educational institutions to address skills gaps in textile design, garment production, and sustainability.
- Invest in upgrading infrastructure, particularly high-speed internet and reliable transportation networks, to enhance production and distribution efficiency.
- Foster partnerships with international fashion and textile firms for knowledge exchange and co-development projects.



The photo showcases exquisite jewelry from AMAMI, a social enterprise dedicated to reviving endangered Filipino jewelry traditions while empowering artisans. Through collaboration with skilled plateros, AMAMI revitalizes the heritage of gold filigree, ensuring its preservation for future generations.

Working with over 20 artisans, each piece reflects intricate, hand-crafted designs that celebrate Filipino culture and craftsmanship.

JEWELRY MAKING

The Philippine jewelry industry is distinctively characterized by its blend of traditional crafts and modern technology. Artisanal techniques like lost wax casting and hand engraving coexist with advanced methods such as CAD and CNC milling. This unique combination ensures high-quality, intricate designs that reflect both heritage and innovation. The industry's focus on sustainability and ethical sourcing, including the use of recycled metals and conflict-free gemstones, aligns with global trends toward responsible consumption. Additionally, the sector benefits from cultural narratives that enhance brand storytelling and consumer engagement, further solidified by the country's strong gift-giving culture and the role of jewelry in special occasions.

The jewelry industry in the Philippines is a vibrant sector with significant economic contributions and cultural importance. As of 2022, the market size of the global jewelry industry was valued at USD 340.69 billion and is projected to expand at a CAGR of 4.6% from 2023 to 2030. Locally, the industry employs around 100,000

17 Department of Trade and Industry–Competitiveness and Innovation Group, "Jewelry Industry Roadmap" (unpublished manuscript, Department of Trade and Industry, n.d.).

individuals and comprises approximately 250 companies, predominantly MSMEs. The average price for fine jewelry varies widely, with silver and gold pieces starting at around USD 200, while high-end diamond jewelry often exceeds USD 2,000. With a strong presence in both physical retail and growing online channels, the industry adapts quickly to changes in consumer behavior and technological advancements.

The Philippines' jewelry industry benefits from the country's rich cultural heritage, a skilled workforce, and innovative technologies like CAD and 3D printing, supported by institutions such as DTI and DOST. However, it faces challenges like underdeveloped rural infrastructure, limited high-quality raw materials, skill gaps in digital technologies, and reliance on imports. Opportunities include global demand for sustainable jewelry, e-commerce growth, and new markets from government initiatives. Threats include competition from low-cost international markets, economic fluctuations, and prevalence of counterfeit products.

Recommendations for development

- Implement comprehensive training programs to enhance artisans' skills and maintain high-quality standards.
- Encourage adoption of CAD design, 3D printing, and laser cutting through financial incentives for upgrading manufacturing processes.
- Develop local supply chains by investing in mining and material processing facilities to secure high-quality raw materials.
- Support sustainable and ethical sourcing initiatives, encouraging brands to adopt eco-friendly practices and certifications.
- Leverage e-commerce platforms and social media to reach a broader audience and enhance global brand visibility.
- Facilitate participation in international trade fairs and forge partnerships with luxury brands to promote Filipino jewelry in global markets.

TOY MAKING

The Philippine toys and characters industry is distinguished by its strong emphasis on crafts and cultural heritage. The integration of indigenous textiles into toy designs by brands like Anthill underscores a unique value proposition. The industry is also characterized by a vibrant art toy segment, with local designers gaining international recognition. This segment leverages collaborations with global brands, to create high-value, collectible items. Furthermore, the industry benefits from a supportive community of toy artists who foster innovation and creative expression.

The Philippine toys and characters industry exhibits significant potential for growth, underpinned by a combination of local crafts and increasing international collaboration. As of 2022, the industry is projected to contribute USD 176.1 million to exports, showing a slight increase from previous years despite global economic challenges. The sector consists of approximately 323 identified firms, with only 9.28% engaged in component sourcing and product manufacturing. Traditional toys dominate the market, while niche segments such as specialty and art toys are gaining traction. In terms of sales channels, the rise of e-commerce has expanded the reach of local toy manufacturers and retailers. The industry's global CAGR is expected to accelerate to 6.7% from 2020 to 2025.[18]

This industry benefits from a skilled labor force in sewing and plush manufacturing, which meets international standards for quality and durability. Strong customer analytics in retail and collaborations with international brands boost the design sector alongside the growing popularity of art toys. However, the industry struggles with a lack of R&D, limited capital for technological upgrades, weak linkages between manufacturers, designers, and retailers, and slow adoption of digital technologies in retail. Furthermore, unlike in the US and Japan, where toys are generally linked to comic books and animated series or cartoons, the Philippines lacks this connection. The creation of associated anime or cartoons for original toy characters creates fans and followers who are the ultimate consumers of these products. Opportunities include forging linkages with local raw material suppliers and domestic retailers, leveraging e-commerce, expanding collaborations with international brands, and adopting digital manufacturing technologies. Threats come from intense competition with lower cost countries, high local production costs, logistical challenges, the proliferation of bootleg products, and economic uncertainties and policy changes.

18 Department of Trade and Industry–Competitiveness and Innovation Group, "Philippine Toys and Characters Industry Roadmap 2022-2030" (unpublished, Department of Trade and Industry, 2022).

Recommendations for development

- Foster stronger connections between manufacturers, designers, and retailers through industry associations and networking events.
- Link creators to animators, comic book publishers, filmmakers, streaming platforms, and advertising agencies to foster cross-pollination of ideas, commercialization, and cross-border trade.
- Increase investment in R&D to drive innovation in toy design and manufacturing, supported by government grants and incentives.
- Accelerate the adoption of digital technologies in retail and manufacturing with training programs for small retailers and manufacturers.
- Support initiatives that integrate indigenous materials and cultural elements into toy designs to enhance the unique value of Philippine-made toys.
- Leverage e-commerce platforms and participation in global trade fairs to promote Philippine toys internationally.



The Jollibee x Quiccs collaboration toy, "JolliTech," was launched at ToyCon PH, held at the SMX Convention Center from June 14 to 16, 2024.

Publishing and Printed Media

Reaching far and wide through reading

The publishing and printed media industry has a unique ability to reach and reflect the experiences of diverse groups. Publications in various regional languages allow communities across the nation to access information and entertainment in their native tongues. This inclusivity fosters a strong connection with readers who might otherwise be excluded due to language barriers or limited digital access.

The publishing and printed media sector encompasses books, textbooks, comics, graphic novels, magazines, newspapers, and other published media. It employs approximately 316,000 people and represents 4.21% of the industry.[19] The country has around 850 book publishers, with a primary focus on educational content. National Book Store, the largest retail chain, has 200 stores nationwide.[20]

The publishing sector has a robust foundation in educational book publishing, which dominates the market and provides a steady revenue stream. The book market was valued at USD 94 million in 2019, with 80% of revenue coming from educational materials. An underdeveloped global market for literary Filipino books limits the international reach and recognition of local authors and publishers. Innovations in digital publishing and e-books can cater to the tech-savvy younger population.

The printed media industry faces challenges due to declining readership. The National Book Development Board's (NBDB) 2023 National Readership Survey showed that book reading habits among Filipinos have declined. Only 47% of children and 42% of Filipino adults have read a non-school book in the past twelve months. Purchase of non-school books was at 8% for adults and 12% for children in the same period. Only 18% of Filipino adults and 12% of children are aware of public libraries in their city/municipality, with higher awareness in Metro Manila. Nonetheless, both adults (89%) and children (88%) respondents express positive attitudes toward the statement, "Reading books is a good leisure activity." [21]

19 Philippine Statistics Authority, *2024 Philippine Creative Economy Satellite Account* (PSA, March 2025), "Table 5: Employment in CI 2018-2024."
20 Department of Trade and Industry–Competitiveness and Innovation Group. "A Background Study on the Television, Radio, and Printed Media Industries" (unpublished, Department of Trade and Industry, 2022).
21 National Book Development Board, *National Readership Survey* (National Book Development Board, 2023).



Photo from NBDB's Philippine Book Festival 2024, held at the World Trade Center from April 25-28, 2024, showcasing the richness of Filipino literature and publishing.

The growing trend of digital and online media consumption offers a pathway for revitalizing the sector. Cross-platform content integration and interactive media can help engage a wider audience.

Recommendations for development

- Encourage publishers to transition to digital formats.
- Promote subscription models for news and media, following successful examples like the *New York Times* and *Rappler*.
- Incorporate current events and news into educational curricula to foster media literacy.
- Provide fiscal and non-fiscal incentives for MSMEs in publishing to support sustainable growth.
- Expand the distribution reach of printed media to remote areas to ensure broader access.
- Promote regional book fairs and support community libraries as knowledge hubs.
- Subsidize translation efforts and offer grants for authors to cover editing, design, and printing costs.

Performing Arts

Bridging communities through collective experience

Small-sized establishments and an adaptable workforce distinguish the performing arts sector in the Philippines. Workers in this field often engage in multiple roles, such as teaching, performing, and producing, showcasing their versatility and dedication. This multifaceted skill set allows them to effectively navigate the industry's challenges. The integration of traditional and contemporary forms, like blending epic chants with modern performance art, highlights the sector's unique cultural richness and dynamism.

The performing arts sector in the Philippines, encompassing live music, dance, and theater, constitutes 0.45 % of the creative industries and employs approximately 34,000 individuals.[22] This sector is predominantly characterized by small establishments, with 92.1% employing fewer than 20 people. Key players include local theater companies, dance troupes, music bands, and individual artists, many of whom draw inspiration from local folklore, religious symbols, and traditional stories. The audience demographic spans all ages, with notable participation in community events and educational settings.



Mula sa Buwan is an original Filipino musical based on Edmond Rostand's timeless classic *Cyrano de Bergerac*. Featuring a cast of dreamers and misfits, the production explores themes of unrequited love and self-acceptance, set against the backdrop of a city on the brink of change.

With original lyrics by William Elvin Manzano and Pat Valera, and music by Manzano, *Mula sa Buwan* continues to captivate audiences, blending history, romance, and powerful storytelling on the Philippine stage.

22 Philippine Statistics Authority, *2024 Philippine Creative Economy*, "Table 5."

Filipino talent in music, dance, and theater is impressive, with performers often achieving world-class standards. The sector benefits from both formal and informal education systems offering training from elementary to tertiary levels. Community involvement is robust, with regional collaborations and active programs from arts organizations that help promote the performing arts.

On the other hand, there is limited access to financial support and a lack of quality infrastructure and facilities for music and performances. Employment in the performing arts is often unstable, and wages are typically below the national average, with many artists holding multiple jobs to make ends meet. Maintaining a steady labor supply is difficult due to the precarious nature of arts employment. Additionally, local performing arts organizations often struggle being perceived as inferior to international productions, and the industry suffers from widespread piracy and intellectual property violations.

Recommendations for development

- Encourage Local Government Units (LGU) to invest in arts infrastructure and events.
- Strengthen educational systems to incorporate the arts more prominently, including teacher training and curriculum development.
- Enforce laws protecting artists' rights and welfare and intellectual property rights.
- Develop and promote a distinctive Filipino performing arts brand, leveraging local and overseas talent.
- Utilize digital and social media to increase the visibility and accessibility of performances.
- Integrate economic strategies with artistic productions, investing in international collaborations and digital technologies to further develop the market.
- Provide incentives and funding to organizations seeking to develop global markets.

Visual Arts

A tight-knit community amidst adversity

The visual arts are a vital cultural asset, reflecting and conserving human experiences through various forms and media. Many artists work collaboratively, sharing knowledge and supporting each other within tight-knit communities. Balancing artistic and entrepreneurial pursuits is a common challenge for these artists.

The visual arts include painting, sculpture, printmaking, photography, installation art, and more. This sector represents 6.2% of the creative industries, with 3,068 firms employing approximately 90,000 individuals. Survey data indicate that a significant proportion of artists are male (62.65%), aged 25-50 (72.29%), with 91.58% holding at least a college degree. Notably, 34% have completed an arts-related degree, while fewer than half have formal training. Income disparities are evident, with many artists earning less than PHP 10,000 during lean periods.

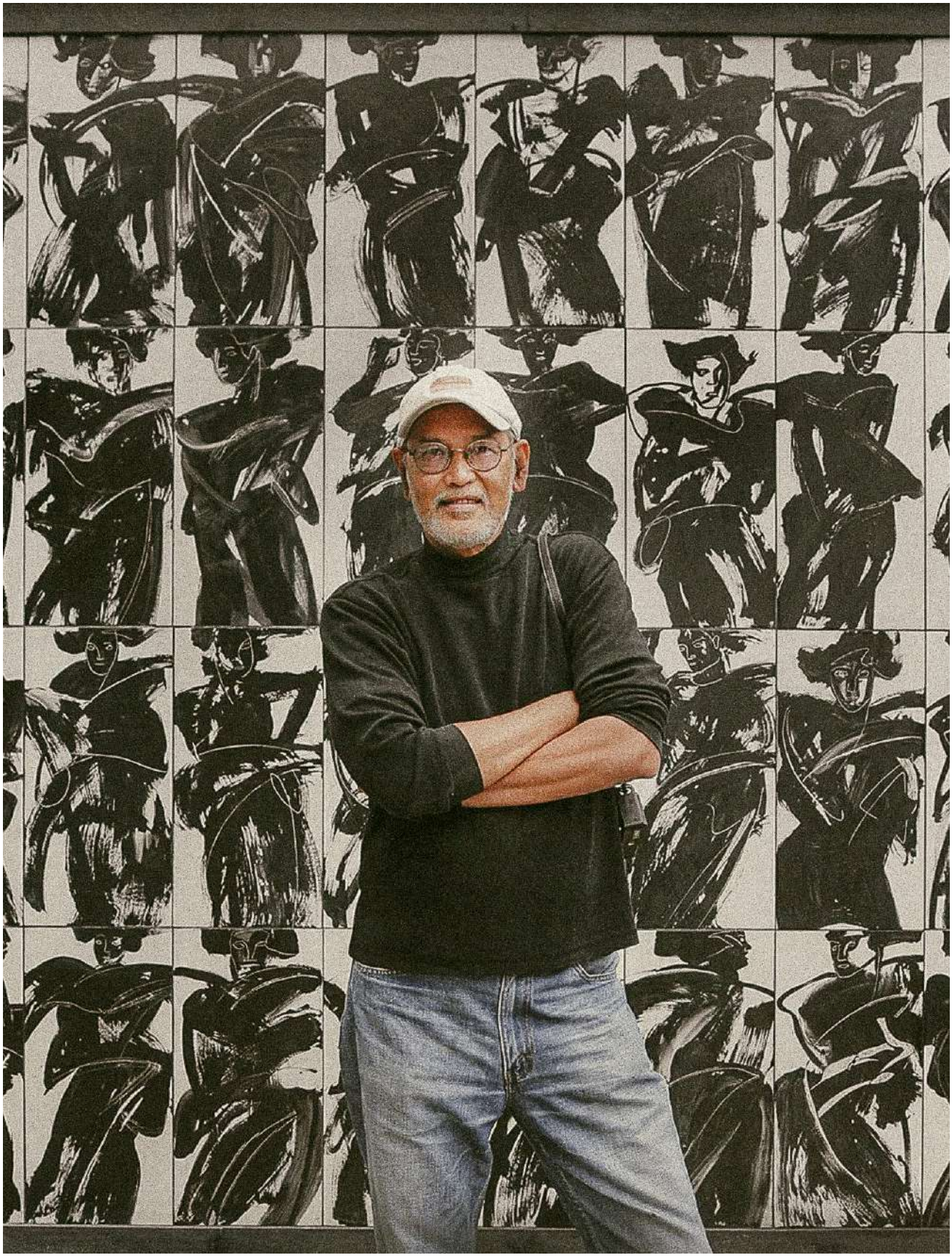
The community is bolstered by strong collaboration and camaraderie among artists, with established art galleries often found in the National Capital Region (NCR) providing exhibition platforms. Informal artist-led organizations serve as training grounds for skills enhancement, and there are some partnerships between the government and private sector to promote Philippine art internationally.

Recommendations for development

- Enhance the global promotion of Philippine art through government initiatives and collaborations with international organizations.
- Foster partnerships to provide artists access to quality materials, technologies, and international opportunities.
- Establish a comprehensive national database of practicing artists to streamline the distribution of support and benefits.

Benedicto "BenCab" Cabrera, a renowned painter and printmaker, has been a defining figure in Philippine contemporary art for over four decades. In 1992, he received the Gawad CCP Para sa Sining, solidifying his influence in the country's art scene. His contributions were further recognized in 2006 when President Gloria Macapagal-Arroyo bestowed upon him the Order of National Artist for Visual Arts at Malacañan Palace.

BenCab's works have been showcased in major exhibitions across Asia, Europe, and the United States. His signature subjects, including the iconic *Sabel*, explore themes of identity, movement, and social history, making his art both timeless and culturally significant.





Traditional Cultural Expressions

Sensory experiences driving local growth

Traditional cultural expressions (TCE) in the Philippines are characterized by their deep connection to the country's cultural and natural heritage, historical influences, and the creativity of the Filipino people. For example, food and gastronomy go beyond just meals, encompassing the entire process of food production and consumption. Similarly, celebrations blend cultural, religious, and historical elements, creating vibrant and meaningful community events.[23]

Traditional cultural expressions encompass the cultural practices, knowledge, and expressions passed down through generations within a community, often linked to their cultural and social identity. This includes oral traditions, rituals, festive events, and traditional crafts, as defined by UNESCO. In the Philippines, TCEs are the biggest employer within the creative industries, employing 2.58 million people and representing a 3.4% industry share.[24]

Food and gastronomy, a notable sub-domain, has seen advancements with legislation and initiatives promoting it as a key cultural and economic sector. The artistry of Filipino chefs and trends like the Slow Food Movement and farm-to-table tourism align with sustainable practices and enhance the sectors appeal.

↑ Iloilo City has been added to the prestigious list of UNESCO Creative Cities for Gastronomy, recognizing the city's rich culinary heritage and its role in sustainable urban development.

This recognition comes under UNESCO's Creative Cities Network, established in 2004, which fosters collaboration among cities that leverage culture and creativity to drive sustainable growth. As a new member of this network, Iloilo joins a global community committed to celebrating and preserving food traditions while promoting innovation within the gastronomic sector.

23 National Commission for Culture and the Arts, "Making Creativity Count: Operationalizing Statistical Mapping of Four Creative & Cultural Sectors under the Philippine Cultural Statistics Framework (Visual Arts, Performing Arts, Heritage, and Gastronomy Sectors)" (unpublished manuscript, July 2022).
24 Philippine Statistics Authority, *2023 Philippine Creative Economy*, "Table 5."

However, Filipino food suffers from weak branding, often perceived by locals as plain and of lower value. Logistical challenges also hinder access to fresh produce, limiting scalability and competitiveness. Globalization presents another challenge, as foreign cuisines often overshadow traditional dishes. There is a lack of written materials documenting the cultural heritage of Philippine food and gastronomy.

Celebrations, another sub-domain, showcases various traditional and contemporary expressions that are both cultural and religious. Festivals and fiestas, often supported by LGUs and private entities, drive tourism and social participation. These events involve performing arts and cultural groups, event directors, stylists, and cultural councils, with artistic components like set designs, costumes, and technical crews sourced locally.

Recommendations for development

- Develop a strong, unique identity for Filipino food and gastronomy through comprehensive branding and marketing strategies.
- Improve cross-agency coordination to create cohesive strategies for promoting food and gastronomic tourism and cultural events.
- Support research and documentation efforts to capture the rich cultural heritage of Philippine food, gastronomy, and celebrations. This includes food mapping and the development of written materials and digital archives.
- Encourage sustainable agricultural practices and fair trade to ensure the environmental and economic sustainability of the food and gastronomy sector. Integrate these practices into the promotion of food and Gastronomy Tourism.
- Encourage the development of innovative festival concepts and artistic collaborations that showcase traditional cultural expressions in contemporary contexts, attracting new audiences and ensuring relevance.
- Invest in the development of cultural venues, facilities, and resources to support the staging of festivals and fiestas, improving accessibility and visitor experience.
- Utilize digital platforms and technology to facilitate event planning and coordination and enhance audience engagement.

Cultural Sites

Discovery through built heritage

The cultural sites domain in the Philippines boasts a rich heritage, with numerous museums and historical sites attracting both local and international visitors. This domain appeals to people of all ages and educational backgrounds who are interested in heritage, culture, and history, making it an inclusive domain that contributes to education, tourism, and the Philippines global identity.

Cultural sites represent a relatively well-documented and organized segment of the country's cultural industry, accounting for 0.3% of the market share and employing approximately 270,000 individuals. Key players include professionals in museums, interpretation centers, libraries, archives, monuments, and sites that promote heritage conservation and cultural dissemination. National institutions like the National Museum, LGUs, and civil society organizations actively promote cultural heritage. The workforce includes professionals from diverse fields, such as anthropologists, historians, archaeologists, librarians, archivists, and advocacy groups, many of whom are employed in the public sector. The passage of the National Cultural Heritage Act of 2009 has provided a strong framework for heritage protection and conservation.

The professionalization of workers in this domain is growing with many positions now requiring academic qualifications and specialized training. However, there remains a lack of formal employment and accreditation for many roles, such as tour guides, who often operate informally without job security.



Visitors experiencing Intramuros through a cultural tour, exploring iconic landmarks such as Fort Santiago, Casa Manila, and San Agustin Church and Museum.

A disconnect between national and local policies leads to inconsistent conservation efforts and conflicting priorities. Furthermore, the commodification of sites through tourism can lead to cultural degradation, unsustainable site management, and misguided plans that do not align with conservation goals.

The domain also faces challenges from inadequate funding, with the NCCA often receiving only a fraction of its proposed budget. The unprotected status of Indigenous Peoples' ancestral lands and cultural heritage poses a significant threat. Conflicts between volunteer organizations and government agencies, coupled with a lack of a unified database for cultural properties, further complicate conservation efforts.

Recommendations for development

- Ensure adequate, transparent, and equitable public funding allocation for capacity building and the upskilling of heritage professionals.
- Allocate a higher budget for heritage conservation and the professional training of workers.
- Adopt standardized procedures for the recognition and conservation of cultural properties.
- Enhance heritage education through interdisciplinary, scientific, and internationally accepted principles and standards.
- Provide formal employment, job security, and professional accreditation for all heritage workers, including tour guides.
- Engage heritage professionals in tourism planning to create sustainable and culturally sensitive tourism strategies.
- Ensure the protection of Indigenous Peoples' ancestral lands and intangible cultural heritage.
- Develop a unified database for all cultural agencies to streamline conservation efforts and avoid conflicts.
- Establish a regional coordinating body to address the commodification of heritage and promote cultural development.

Table 2

Key Characteristics and Strengths, Weaknesses, Opportunities, and Threats (SWOT) of the Creative Industries

The following section summarizes the key characteristics and SWOT of the creative industries, starting with the overview below:

AREA	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Workforce	▪ Young, skilled, tech-savvy demographic ▪ High employment rate ▪ English-speaking	▪ Lack of appreciation for creative career paths ▪ Limited support for creative thinking in education ▪ Job market-skills mismatch	▪ Major employers of young people ▪ New types of jobs being created ▪ Creativity as a skill is in demand	▪ Underrepresentation of marginalized groups ▪ Job redundancies from automation ▪ Government deprioritization for art education
Market	▪ Large consumer and audience base in-country and within Southeast Asia ▪ Increasing spending power ▪ Global exposure through diaspora	▪ Weak distribution and supply chains ▪ Limited access to international markets ▪ Unsustainable and insufficient production inputs	▪ Growing consumer preference for sustainably made products ▪ New experiences for consuming content (e.g., gamification) ▪ The Philippine diaspora as cultural 'ambassadors'	▪ New sustainability regulations across entire value chains
Digital connectivity	▪ High social media penetration ▪ Fast-growing digital economy through online transactions	▪ Inequity in broadband internet access ▪ Underinvestment in new technologies ▪ Weak systems for stimulating cross-sectoral collaboration	▪ Inclusive growth potential of the digital economy is not yet unlocked	▪ Data privacy breaches ▪ Copyright concerns over AI-generated works ▪ New ethical concerns surrounding AI limits
Innovation and service capabilities	▪ High number of firms in digital and creative activities ▪ Significant employer and revenue generator	▪ Weak IP ownership and optimization ▪ Low talent retention and upskilling ▪ Lack of innovation infrastructure ▪ Underinvestment in eco-innovations	▪ Digital transformation decentralizing content distribution	▪ High energy requirements for technology
Support for creative work	▪ Laws aligned with global standards in place ▪ Growing awareness of IP protection	▪ Limited government support and incentives for creative enterprises ▪ Low access to capital ▪ Poor ease of doing business ranking	▪ New revenue streams for creators ▪ New platforms replacing traditional production methods	▪ Monopolies of big tech companies ▪ Underemployment with poor job welfare, especially for the youth ▪ Censorship ▪ Media fragility

Key Characteristics of the Philippine Creative Industries

Area 1
A YOUNG AND TALENTED WORKFORCE

At the core of the creative industries are people, ideas, and knowledge – the country's biggest assets. Local and global audiences recognize the talent and creative excellence of homegrown artists.[25] Notable icons include Francis Libiran in fashion, Lea Salonga in music and performing arts, and Kenneth Cobonpue in furniture design.

Youth employment rate in the Philippines was estimated at 91.1 %.[26] The large, English-speaking workforce has a global reputation for being talented, tech-savvy, and skilled. With a median age of 25, the Philippines boasts one of the youngest populations among emerging economies in the world (see Figure 9). In particular, Gen Zs are globally known for their creative expressions and being digital natives. [27] This generation can potentially become the engine of creative talent that will power original Filipino creative content production.

> Yet, there is a general lack of appreciation for creative fields as stable, successful and long-term career options.

This discourages young people and their parents from considering the arts as a viable career path. The reluctance is evidenced by the declining enrollment numbers in arts and design programs in Grades 11 and 12 (see Figures 10, 11), along with the minimal representation of arts and design students compared to the total number of Grades 11 and 12 students in the country's Senior High School System (see Figure 12).

25 Tom Fleming, *The Philippine Creative Economy: Toward a Baseline & Programme* (British Council, 2017).
26 Philippine Statistics Authority, "Employment Rate in June 2024 Was Estimated at 96.9 Percent," July 29, 2024.
27 J. Walter Thompson Intelligence and Snap, Inc., *Into Z Future: Understanding Generation Z, the Next Generation of Super Creatives* (JWT Intelligence, June 18, 2019). JWT Intelligence has since changed its name to VML Intelligence.

Despite having a growing workforce, concerns over the country's labor supply of creative professionals, both in terms of quality and sustainability, persist. The complexity of demands for high-quality creative output has increased due to the expansion of technical requirements brought about by the transformation of workplaces and the sophistication of technology. According to ***The Future of Jobs Report 2023,***[28] six out of ten workers worldwide will need training by 2027, but only half currently have access to adequate training opportunities.

The Philippines' performance in the Programme for International Student Assessment (PISA) 2022 Creative Thinking Assessment revealed that the country was one of the lowest performers, with less than 50% of students reaching the baseline level of proficiency in creative thinking.[29] Creative thinking is crucial for preparing students to adapt to a rapidly changing world that demands flexibility and innovation.[30] The results indicate that students may lack sufficient opportunities to develop these essential skills in current educational environments.

To support the creative industries, DepEd's Senior High School program offers tracks that directly cultivate creative skills. The Arts and Design track provides specializations in fields like Performing Arts, Creative Writing, and Multimedia Arts. Meanwhile, their Technical-Vocational track offers specializations relevant to creative fields, such as Graphic Design Technology, Animation, and Cookery, among others.

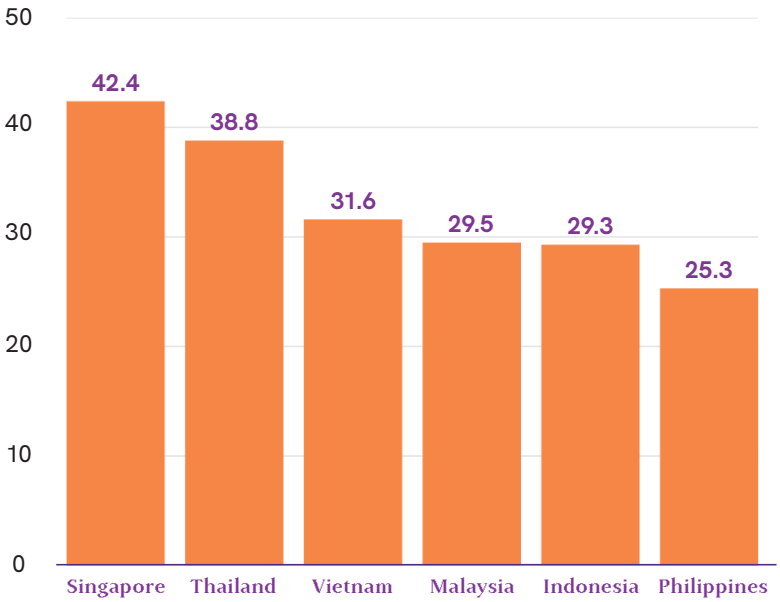
28 World Economic Forum, *Future of Jobs Report 2023: Insight Report* (World Economic Forum, 2023).
29 OECD, "PISA 2022 Creative Thinking Framework" (OECD, 2022).
30 OECD, "Executive Summary," in *PISA 2022 Results (Volume III): Creative Minds, Creative Schools* (OECD Publishing, 2024).

To further accelerate inclusive innovation in the arts, DepEd is establishing Regional Arts Academies. These academies will serve as centers of excellence for the creative industries within basic education. Equipped with state-of-the-art facilities and technology, they will form direct partnerships with regional creative industries players.

Currently, the Philippines has specialized schools for the arts, including the Philippine High School for the Arts (PHSA), Bataan High School for the Arts, Bikol High School for the Arts and Culture, Regional Lead Schools for the Arts in Angono, Batangas Province High School for Culture and the Arts, and Mandaue City School for the Arts. To ensure consistency and quality, DepEd is developing a policy to standardize the curriculum and implementation across all schools for the arts.

Figure 9

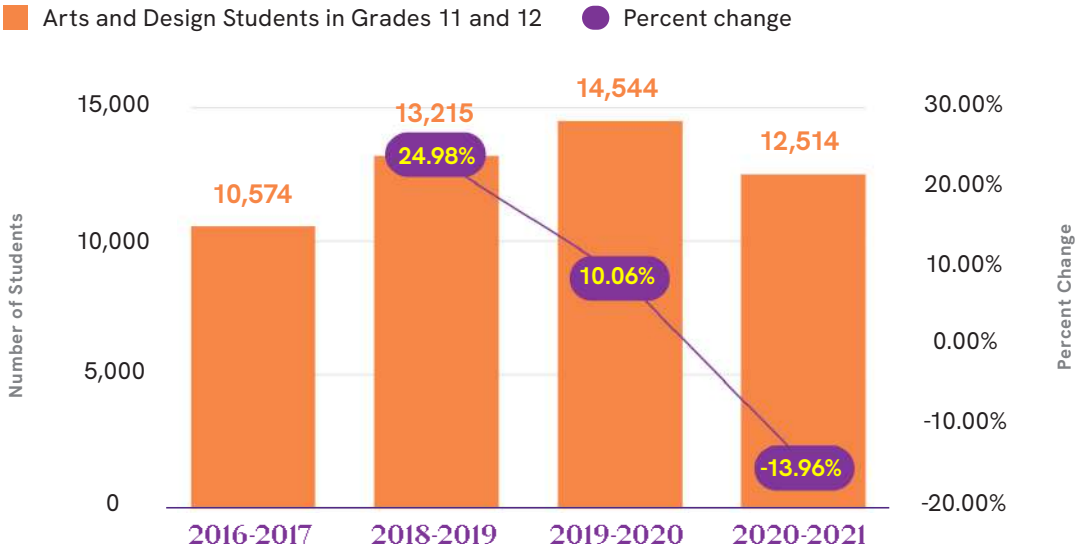
Median Age of Selected Countries in Southeast Asia



Source: Based on Statista, Median age in Southeast Asia in 2023 (2024). Reformatted for presentation.

Figure 10

Enrollment Trends: Arts and Design Students in Grades 11 and 12, Academic Years 2016-2021



Source: Based on Department of Education, Statistics, (2016-2021). Reformatted for presentation.

In terms of regional distribution of students in the Arts and Design track, the majority of the student population is concentrated in NCR, followed by CALABARZON, the Bicol Region, Central Visayas, and Central Luzon (see Figure 11).

Figure 11

Arts and Design Students in the Philippines, by Region

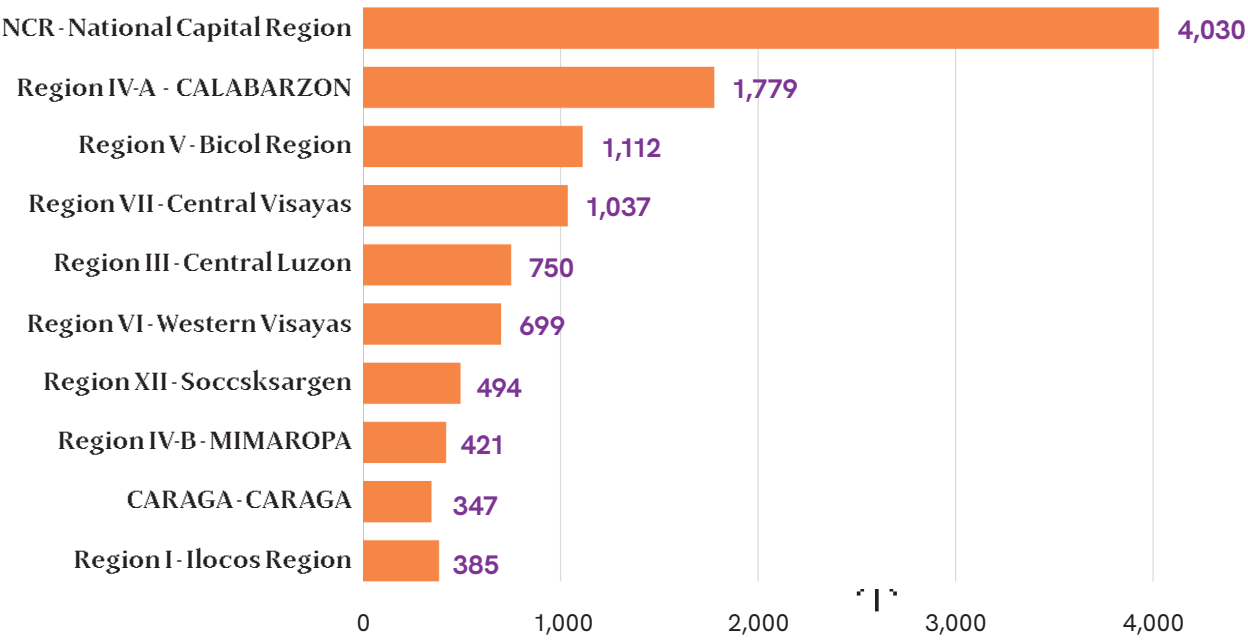


Table created using statistics from the Department of Education, Statistics, (2016-2021). Numbers are rounded to the nearest approximate.

Figure 12

Share of Arts and Design Student Enrollment in Grades 11 and 12 to Total Enrollment (Individual)

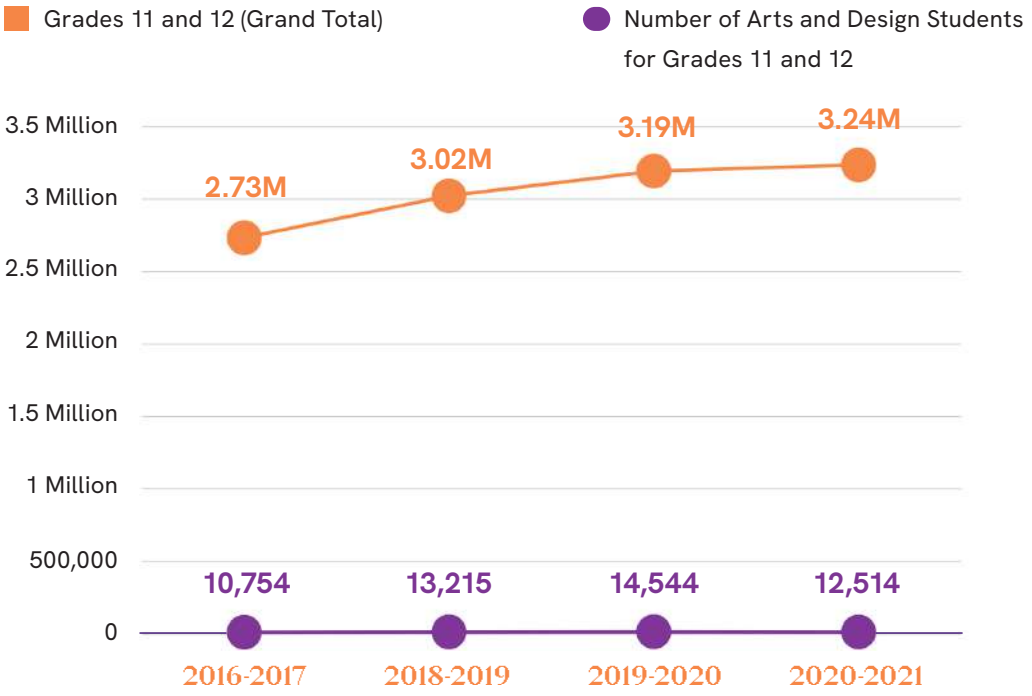


Table created using statistics from Department of Education, Statistics, (2016-2021). Numbers are rounded to the nearest approximate.

Area 2

A VAST DOMESTIC BASE CONNECTED TO REGIONAL AND GLOBAL MARKETS

With a consumer base exceeding 117 million, ranking as the 14th largest population globally, and rising incomes, the domestic market provides an ideal platform for creative endeavors to gain traction before expanding onto the global stage (see Figure 13).

Regionally, the Philippines can tap into Southeast Asia's consumer base of over 690 million. The region's cultural affinity presents an opportunity for Filipino stories and original content to resonate with neighboring countries.

Globally, the burgeoning educated and middle-class populations, coupled with increasing demand for creative outputs and rising real per capita income, propel this demand.

The two million OFWs in various parts of the world represent a natural audience and serve as ambassadors for Filipino content.



Photo from Zapateria - Philippines' creative hub for footwear design and development that aims to foster the industry's new generation of independent shoemakers.

Stepping Up: Building Supply Chains to Propel the Philippine Footwear Industry onto the Global Stage

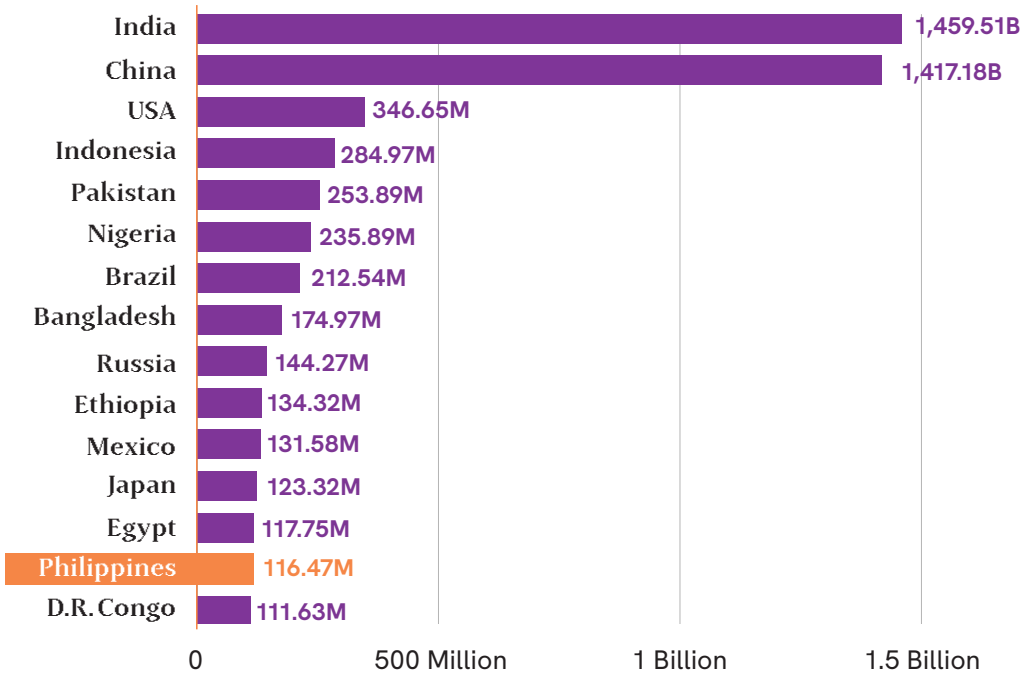
In the Philippine footwear industry, weak backward and forward linkages present significant challenges, limiting its capacity to thrive.

On the other hand, the Philippines' industry supply chain linkages remain weak, and connectivity to global networks is below potential. High material costs, limited domestic sources of production inputs, supply chain gaps, and other production-related issues weigh down efforts to sustain activities. At the same time, challenges in integrating into global value chains impede the creative industries' access to international markets.

These linkages encompass both the connections with suppliers of raw materials (backward) and distribution channels or end consumers (forward). Strengthening these linkages is crucial for enhancing the industry's efficiency, competitiveness, and market reach. Additionally, the industry faces hurdles in penetrating both domestic and international markets, restricting its growth potential.

Figure 13

Most Populous Countries in the World



Source: Based on Worldometer, Most Populous Countries in the World (2025). Reformatted for presentation. Numbers are rounded to the nearest approximate.

Area 3

A NATION OF DIGITAL NATIVES, MOSTLY SOCIAL MEDIA SAVVY

As of 2022, over 85 million Filipinos have internet access, with 99% of them being active on social media.[31] This not only offers a vast audience for creators and businesses but also signifies the potential of the population to produce diverse content.

The fast-growing digital economy was valued at PHP 2.08 trillion in 2022, accounting for 9.4% of the GDP. The digital sector employed around 6 million people or 13% of the total workforce with digital payments making up 42.1% of all transactions.[32] Despite this, broadband internet penetration remains low, and inequity in internet access has significantly widened, putting lower-middle-income groups and small businesses at a disadvantage.[33]

> There is a need to transform creative industries digitally and strengthen R&D, but there is a big gap in stimulating cross-sectoral collaboration, as well as a notable underinvestment in new technologies.

Collaboration between technology and creative industries and art-science can lead to groundbreaking creations, enhance production efficiencies, and drive value in both sectors. This sweet spot, if successful, can position the Philippines at the forefront of culture-led innovation and drive global competitiveness.

The country shows substantial potential for expanding its digital and R&D capacities.

According to the 2023 e-Conomy SEA Report, the Philippines' digital economy is projected to reach USD 35 billion by 2025 (see Figure 14). Furthermore, it is expected to continue growing in the coming years, potentially reaching USD 80 to 150 billion by 2030.[34]



Behind-the-scenes of the award-winning animated film *Iti Mapukpukaw* (The Missing), a pioneering Filipino production that pushed the boundaries of animation

Innovation in Action: Stimulating R&D Investments in the Film Industry

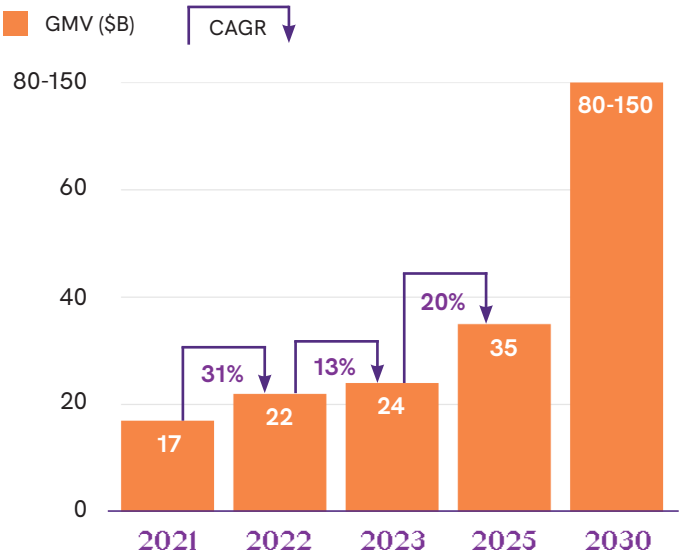
R&D expenditure in the film industry is insufficient. This limits the full potential of the industry to create world-class quality films. It also prevents establishments engaged in film production from expanding their production and utilizing new technologies. While the FDCP has facilitated several engagements to encourage the transfer of technology and collaboration among filmmakers in the Asia Pacific region, the level and extent of support are still incomparable to those provided by other countries in the region. This makes the Philippines less competitive in generating local and foreign investments.

31 Sue Howe, "Social Media Statistics in the Philippines [Updated 2024]" (California: Meltwater and We Are Social, May 3, 2024).
32 Tsang, Andrew, "The Challenges and Opportunities of the Philippines Economic Digitalization," BusinessWorld, April 11, 2024.
33 Kanehira, Naoto, Mitch Abdon, and Mary Grace Mirandilla-Santos, "Upgrading Philippine Internet for Faster and Inclusive Growth," East Asia & Pacific on the Rise, April 4, 2024.
34 Google, Temasek, Bain & Company, e-Conomy SEA 2023, Country spotlight: Philippines (California: Google, 2023).

Figure 14

Overall Digital Economy of the Philippines

(USD Billion)



Source: Google, Temasek, Bain & Company (2023). Reformatted for presentation.

Area 4

GLOBAL CAPABILITIES IN KEY DIGITAL CREATIVE SERVICES

The Philippines hosts notable creative enterprises and talents across various creative fields, many of which primarily operate as service providers or outsourced firms to international clients. According to the IT and Business Process Association of the Philippines (IBPAP), the animation and game development sector is poised for revenue and employment growth from 7% to 12% in the coming years. This aligns with projections from the Game Developers Association of the Philippines (GDAP), which forecasts a CAGR of 7.5% for the game development industry from 2021 to 2026. The anticipated growth rates are illustrated in Figure 15.

The global IT-BPM industry is estimated to have generated USD 265 to 275 billion in revenue in 2022 and is experiencing continuous growth. With a workforce projected to reach 9 to 9.5 million FTEs by 2028, it bolsters the Philippines' strong global footprint in the value chains



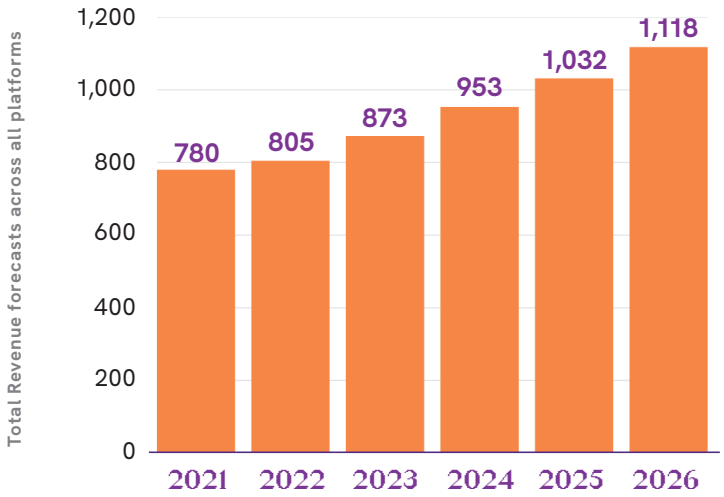
Scenes from 2024 Malikhaing Pinoy: Animation and Game Development Masterclasses

Level Up: Overcoming Funding Issues to Pioneer New Gaming Frontiers

In the Philippine game development sector, securing funding for the development of original games is a significant challenge. This hinders the innovation and growth potential of local game developers. It also restricts the capacity to explore creative ideas, invest in research and development, and produce original game concepts. By addressing this challenge and securing adequate funding sources, the industry can empower developers to unleash their creativity, drive innovation, and produce unique gaming experiences.

Figure 15

Total Revenue of the Philippine Game Development Industry, 2021-2026
(USD Billion)



Source: Game development roadmap. Department of Trade and Industry. Reformatted for presentation.

of digital creative services such as IT, software development, digital animation, and game development (Figures 16, 17).[35] The capabilities from these sectors serve as good foundations for businesses to participate in the global value chains of digital creative services, especially with the rapid shift to the digital economy.

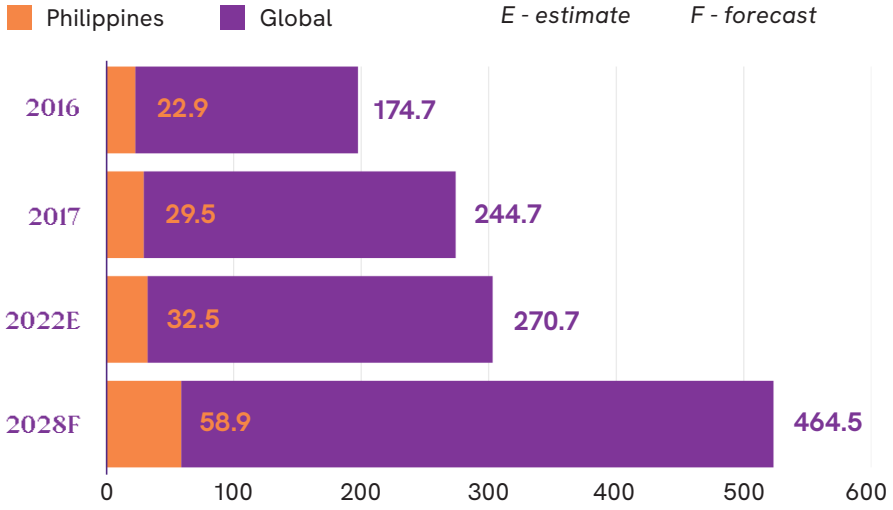
Despite their impressive economic contributions, the lack of original IP ownership presents a major challenge, limiting long-term revenue generation and hindering the development of a sustainable competitive advantage in the global market. Furthermore, retaining and upskilling talent is also a significant challenge, negatively affecting the sector's capacity to keep pace with technological advancements and meet demands for high-quality digital services.

There are substantial gaps in support, with many perceiving a lack of government backing for homegrown talent and creative firms. Access to capital remains a significant obstacle, preventing many businesses from scaling up. Lastly, the process of establishing and operating firms in the Philippines is often long and tedious. Creative professionals and enterprises continue to grapple with these constraints that impede the ease of doing business. Although the Philippines improved its ranking by 29 places moving from 124th in 2019 to 95th out of 190 economies in the 2020 World Bank Doing Business Report,[36] there is still an urgent need for more streamlined and digitized processes.

35 IT & Business Process Association Philippines, *The Philippine IT-BPM Industry Roadmap 2028-Executive Summary.*
36 World Bank Group, *Economy Profile Philippines: Doing Business 2020* (World Bank Group, 2021).

Figure 16

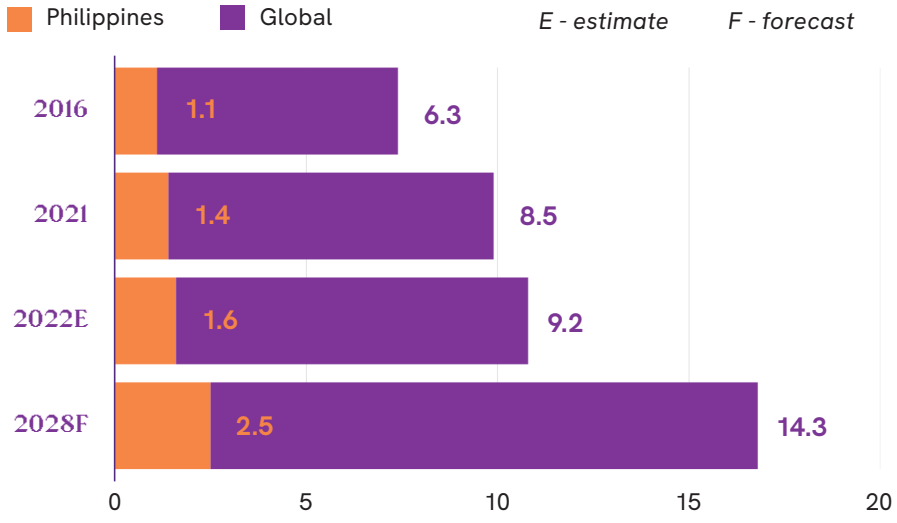
Global & Philippines IT-BPM services market revenue 2016- 2028F
(USD Billion)



Source: IBPAP, The Philippine IT-BPM Industry Roadmap 2028, (2022). Reformatted for presentation.

Figure 17

Global & Philippines IT-BPM services market headcount 2016-2028F
(number of FTEs, in millions)



Source: IBPAP, The Philippine IT-BPM Industry Roadmap 2028, (2022). Reformatted for presentation.

Area 5
STRUCTURAL CAPABILITIES TO PROTECT CREATIVE PRODUCTION

The inherent connection between intellectual property and the creative economy lies in artists and creative people generating original ideas and protecting their work.[37]

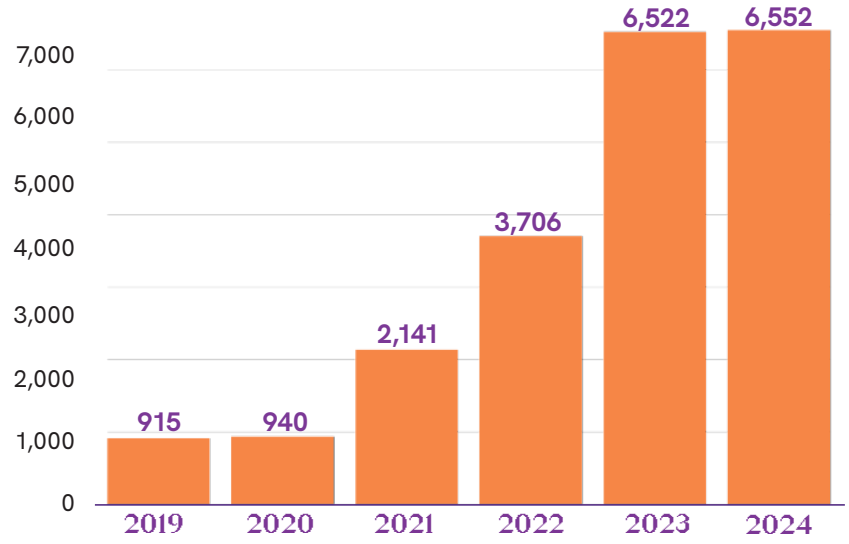
General laws and policies supporting a conducive IP environment are in place and aligned with international frameworks. Despite the laws and policies in the Philippines supporting a conducive IP environment, enforcement has been challenging. For instance, one prevailing issue is the lack of knowledge and understanding of the copyright laws within the industry. At the same time, enforcing IP rights remains difficult and inconsistent. To address these challenges, the Intellectual Property Office of the Philippines (IPOPHL) is working on amending the Intellectual Property Code of the Philippines to respond to current and emerging IP issues, including those in the creative industries, and to strengthen the enforcement of IP rights in the digital environment. The IPOPHL has also initiated the signing of a Memorandum of Understanding with Internet Service Providers and the National Telecommunications Commission to block pirate sites, and another with brand owners and eCommerce platforms to establish a code of practice for protecting IP rights online. This includes establishing an efficient notice-and-takedown procedure and preventive measures. The IPOPHL also continues to review and enhance its administrative rules and processes on adjudication and IP dispute resolution. One bill currently pending in Congress proposes site-blocking of websites that contain or facilitate pirated content.

In 2024, IPOPHL saw a record-breaking 6,500 copyright certifications, equivalent to a 75% increase from 2022, reflecting a heightened awareness and emphasis on protecting creative works (see Figure 18).

37 Gina Cárdenas, Esteban Santamaría, and Matteo Grazzi, "Using Intellectual Property as a Driver of the Creative Economy," *Puntos Sobre La* (Inter-American Development Bank), July 8, 2023.

Figure 18

Copyright Issued Certificates, 2019–202

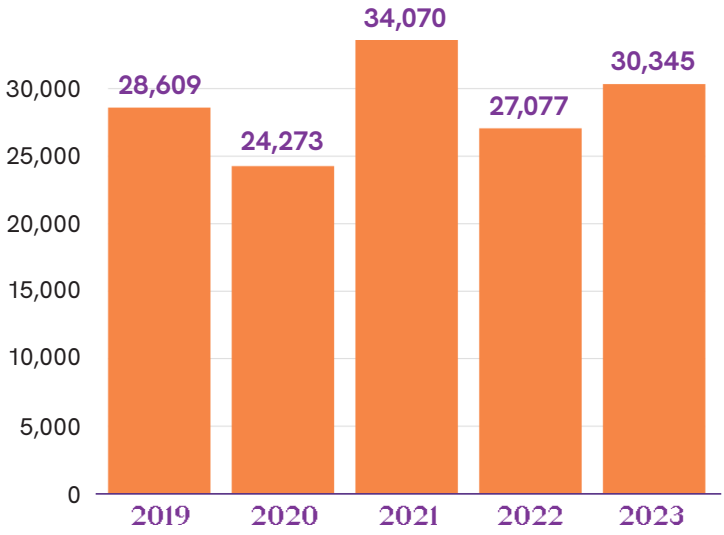


Source: IPOPHL, "Copyright Issued Certificate, 2019-2024," (2025). Reformatted for presentation.

This surge can be attributed to factors such as the proliferation of digital content creation tools, increased global connectivity of creative industries, and a growing understanding among creators of their intellectual property rights.

Meanwhile, in terms of trademark registration, IPOPHL recorded over 30,000 registrations in 2023, a 12% increase from the previous year. Industrial design registrations totaled 5,094 over the past five years (see Figure 19).

Figure 19
Trademark Registration, 2019–2023



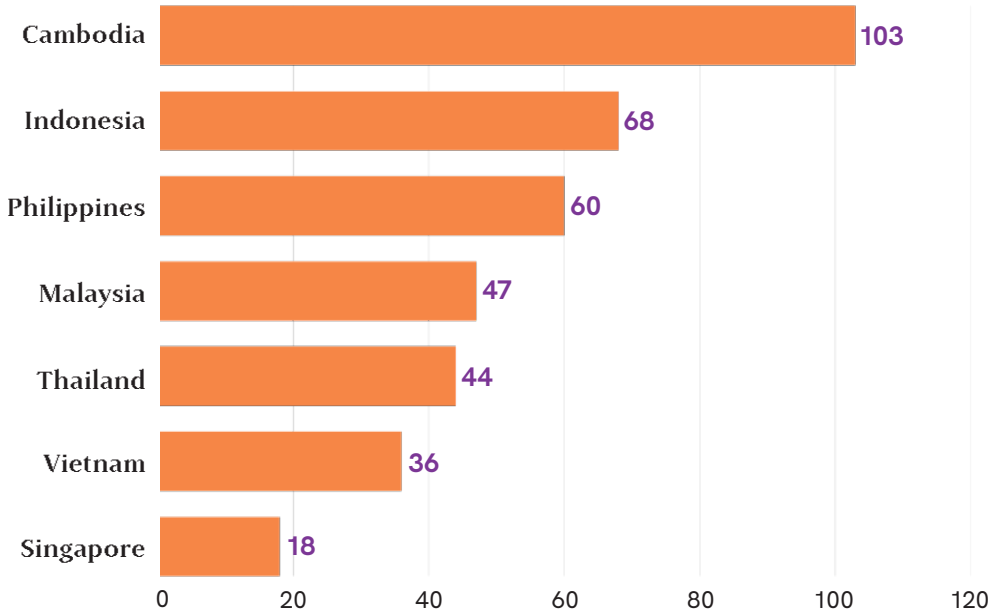
Source: IPOPHL, "Copyright Issued Certificates, 2019 - 2023," (2024). Reformatted for presentation.

The Transnational Alliance to Combat Illegal Trade (TRACIT),[38] an important actor working against counterfeiting and piracy in ASEAN, has removed the Philippines from the EU Intellectual Property Rights Watchlist[39] and the United States Trade Representative (USTR) Special 301 Watchlist for eight consecutive years since 2014.[40] Furthermore, the Philippines has acceded to the Madrid Protocol, allowing applicants in the Philippines to protect their trademarks in multiple territories through a single application. A similar process will also be applied to industrial designs once the Philippines completes its accession to the Hague Agreement. However, counterfeiting and piracy continue to threaten and disrupt our creative industries. The amount of worldwide commerce in counterfeit and pirated products is estimated at USD 464 billion in 2019, or 2.5% of global trade.[41]

38 Transnational Alliance to Combat Illicit Trade Organization, *Fighting Fakes, Contraband and Illicit Trade: Spotlight on the Philippines* (TRACIT.org, 2023).
39 EU Communication and Information Resource Centre for Administrations, Businesses and Citizens (CIRCABAC), *Counterfeit and Piracy Watch List* (European Commission, December 1, 2022).
40 Office of the United States Trade Representative, U.S. Removes the Philippines from the Special 301 Watch List, April 28, 2014, The USTR Archives.
41 European Union Intellectual Property Office (EUIPO), "Global Trade in Fakes: A Worrying Threat," June 2021.

Figure 20

2024 GII Ranking of Selected ASEAN Countries for Creative Outputs



Source: Global Innovation Index 2024, (2025). Reformatted for presentation.

Area 6
GOVERNANCE AND INDUSTRY ASSOCIATIONS

All LGUs, in coordination with PCIDC, NCCA, and the DILG, are mandated to establish a Local Culture and Arts Council (LCAC). LCACs are key to local implementation of the Plan at the city and municipal levels.

They not only support the national council in executing initiatives but also devise, implement, and evaluate localized programs and projects aimed at fostering the creative industries within their respective areas.

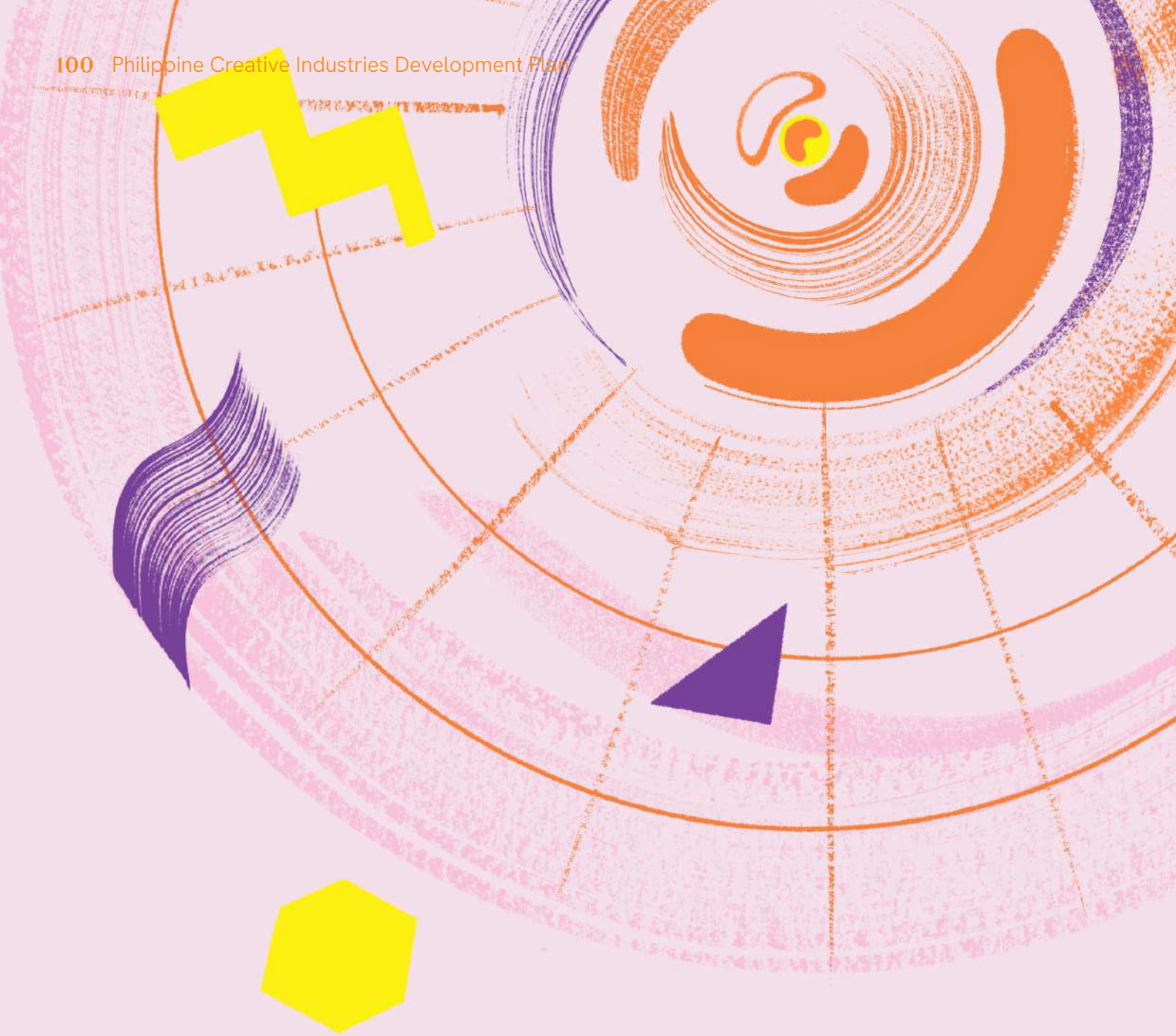
The government likewise clearly commits to sustained partnerships with the private sector. The presence of highly organized and dedicated professional and industry associations is an indispensable strength. These entities have been very active and instrumental in championing the industry's needs and pushing for a better professional and business environment. A more detailed governance framework is found in Part 4.





3

Painting the Global Creative Industries



How do we situate the Philippines within the global creative industries? This chapter examines the global landscape and highlights various policy approaches that inform the Plan. By drawing on lessons learned from past trends and initiatives, the Plan can better anticipate the positive and negative impacts of creative industries interventions. Lastly, it outlines how to position the Philippines as a country brand within this dynamic global context.

GLOBAL LANDSCAPE AND TRENDS

A multitude of interconnected factors has propelled the emergence and development of creative industries worldwide. These include the rapid advancement of technology, the transition to a knowledge-based economy, and shifting sociocultural dynamics. In today's interconnected world, there is an ever-growing demand for cultural products and experiences, driving the expansion of creative activities. As a result, creative industries have emerged as a dynamic force shaping contemporary society.[1]

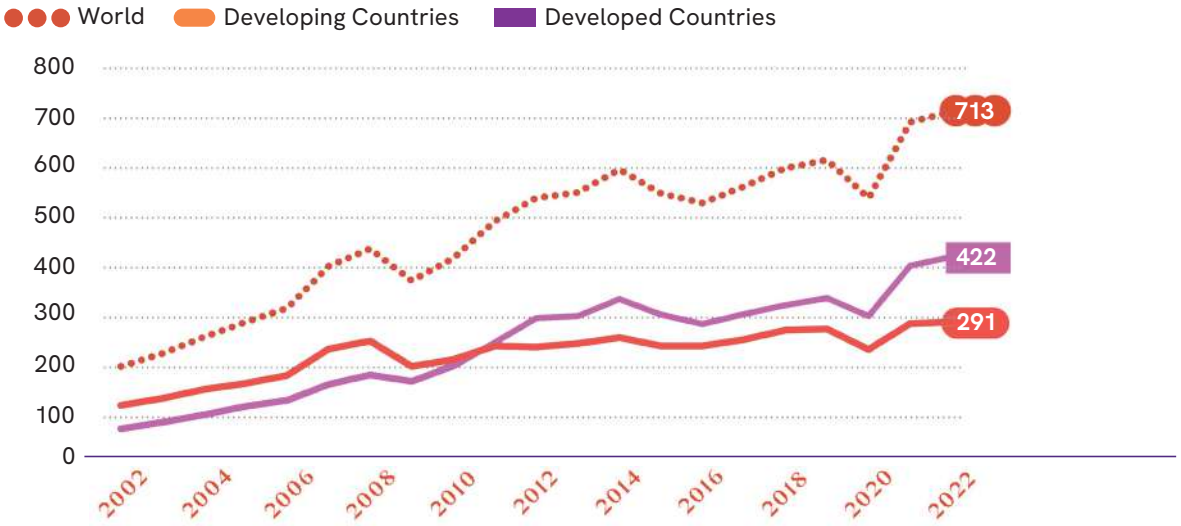
In 2020, the creative industries accounted for 3.1% of the global economy and 6.2% of global employment.[2]

With sustained growth and expansion, they are projected to contribute 10% of the global GDP by 2030, making them a key driver of inclusive and sustainable development.[3] The expansion of global trade in creative goods and services has largely contributed to this growth, with trade doubling over 10 years to USD 524 billion in 2020.[4]

1 Sacco, Pier Luigi. "Culture 3.0: A New Perspective for the EU 2014-2020 Structural Funds Programming," *European Expert Network on Culture*, 2011, Accessed 2024.
2 UNESCO, *Re|Shaping Policies for Creativity: Addressing Culture as a Global Public Good* (UNESCO, 2022).
3 Tetsushi Sonobe, Nicolas J.A. Buchoud, Tan Ghee Tiong, Seungju Baek, Nella Sri Hendriyetty, and Erica Paula Sioson, *Creative Economy 2030* (Asian Development Bank Institute, 2022).
4 United Nations Conference on Trade and Development (UNCTAD), *Creative Economy Outlook 2022* (United Nations, 2022).

Figure 21

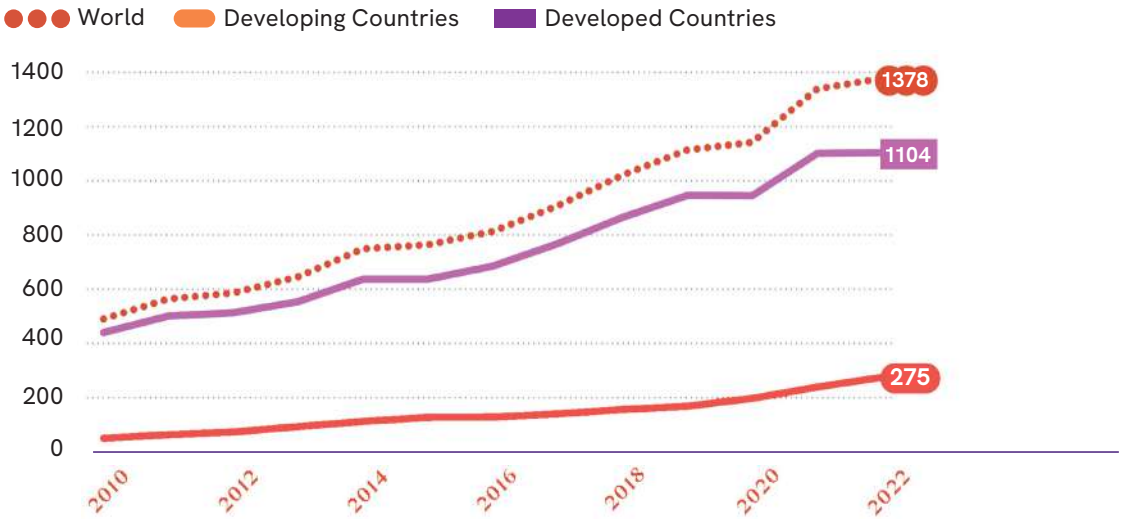
Exports of All Creative Goods by Developing and Developed Economies, 2010-2022
(USD Billion)



Source: UNCTAD, Creative Economy Outlook (2024). Reformatted for presentation.

Figure 22

Exports of All Creative Services by Developing and Developed Economies, 2010-2022
(USD Billion)



Source: UNCTAD, Creative Economy Outlook (2024). Reformatted for presentation.

The United Nations Conference on Trade and Development (UNCTAD) reports that creative goods exports have more than doubled from USD 208 billion in 2002 to USD 713 billion in 2022, within 20 years (see Figure 21). In terms of contribution, crafts and design goods accounted for 75.6 per cent of total creative goods exports, followed by software, video games and recorded media goods (14.1 per cent), music, performing and visual arts-related goods (4.7 per cent), and books and publishing products (3.7 per cent).[5]

Meanwhile, buoyed by digital technology, exports of creative services more than doubled within just 10 years, growing from USD 1.4 trillion billion to almost USD 1.1 trillion between 2010 and 2020 (see Figure 22). Software services (41.3%) and research and development (30.7%) contributed more than 70% of global exports, with the remainder coming from advertising, market research, and architecture (15.5%), audiovisual (7.9%), information services (4%), and cultural, recreational, and heritage services (0.6%).

Despite this growth, threats and vulnerabilities persist. Global inequality is on the rise, and although the creative industries are significant employers, they often face issues of underemployment and low-quality jobs. In the Philippines, inequality remains a challenge, with the top 1% earning 17% of national income, while the bottom 50% share only 14%.[6]

Monopolies of large technology platforms, typically owned by companies from developed countries, diminish the bargaining power of small producers and limit the diversity of cultural content. As a result, marginalized communities are excluded from mainstream media and cultural narratives. This, alongside issues like censorship and media fragility, can restrict equitable representation of voices and hamper innovation and the development of creative industries.[7]

5 UNCTAD, *Creative Economy Outlook 2024*.
6 The World Bank, *Overcoming Poverty and Inequality in the Philippines*, November 24, 2022.
7 UNESCO, *World Trends in Freedom of Expression and Media Development: Global Report 2017/2018*, 2018.
8 UNESCO, "Youth and Cultural Policies: Coming of Age," June 30, 2021, Last updated April 20, 2023.



JOBS

The creative industries are youthful, employing more people aged 15-29 than any other sector.[8] In certain OECD and EU countries, women comprise nearly 50% of the workforce.[9] However, women remain underrepresented in leadership positions and continue to face wage disparities. Indigenous artists encounter barriers related to cultural appropriation, limited resources, and marginalization within mainstream artistic spaces. The LGBTQ+ community, people of color, and persons with disabilities contend with similar challenges, including tokenization and systemic discrimination.

Driven by open community digital platforms in recent years, many lines within the art and culture sector have blurred. Distinctions between traditional and cross-disciplinary practices and roles between users and producers have faded, giving way to all kinds of new occupations. The growing importance of human creative thinking is increasing the demand for creative roles across traditionally non-creative industries. Amidst automation, creativity has emerged as the second most in-demand skill among workers in industries, following analytical thinking. Employment in the creative industries is expected to grow by 40% by 2030, comprising more than 9% of total employment in nine major economies, including South Korea, Japan, UK, and Germany.[10]

With digital and social transformations reshaping the nature of work, adaptability and upskilling have become more critical than ever. It is crucial to acknowledge that automation poses challenges for certain creative professions; for example, animators, who require technical skills, are now facing disruption due to AI. This presents a dilemma for young professionals entering the industry,

The **Malikhaing Pinoy Website** website—https://www.malikhaingpinoy.ph/—is a user-friendly digital hub designed to centralize essential information, resources, and support services for stakeholders in the creative industries. The platform fosters collaboration, drives industry growth, and advances the creative agenda nationwide by leveraging cutting-edge technology and data-driven insights.

Its development fulfills the mandate of Section 18 of Republic Act No. 11904 (Philippine Creative Industries Development Act), which designates the PCIDC Secretariat as responsible for its creation and maintenance. As the primary source of information on industry statistics, events, government programs, and benefits, the PCI website plays a crucial role in supporting and promoting the Philippine creative economy.

9 OECD, "LMF1.6 Gender differences in employment outcomes," OECD Family Database, n.d.

10 World Economic Forum, Future of Jobs Report 2023: Insight Report (World Economic Forum, 2023).

as the scarcity of entry-level positions limits their ability to gain the experience needed to become sought-after creative talents.

Lastly, with governments and universities often prioritizing STEM subjects over art education, art schools face the risk of closure, endangering the pipeline of creative talent.[11]

MARKETS AND AUDIENCES

Digital connectivity has revolutionized how creative goods and services are consumed and delivered to clients, consumers, and audiences. Virtual production is transforming traditional methods of producing films, music, and gaming, among others. The platform economy enables digital creative services such as streaming, online publishing, software, digital art and photography, and AI services to be distributed to a wider audience across multiple markets worldwide simultaneously.

In 2021, 91.7% of the global market for entertainment content (television and films) was attributed to the digital segment.[12] With billions of users, content creators can leverage the global reach of social media to generate new revenue streams. As new markets for creative content emerge outside of the West, particularly in Asia, giant creative companies like Marvel, Disney, and Pixar are also embracing more culturally diverse content.

TECHNOLOGY AND INNOVATION

The synergy of creative content and AI is a powerful force.

AI is already accelerating the process of creative ideation by generating suggested texts, images, and content that can aid in the creative thinking process. From writing movie scripts and exploring new designs to discovering new materials, AI complements human imagination and scales creative outputs. It reduces transaction costs and more efficiently connects consumers with their preferred content, whether through matching music playlists to listeners or recommending films. AI also helps content creators to generate insights based on feedback, allowing them to tailor fit content to their target audience.

11 Grant, Daniel, "Why So Many Independent Art Colleges Are Shutting Their Doors," Observer, September 11, 2023.
12 Motion Pictures Association, Theme Report 2021 (Motion Pictures Association, 2022).



Scene from 2024 Malikhaing Pinoy: Animation and Game Development Masterclasses

LikhaSanay is a government-funded masterclass under the Malikhaing Pinoy Program. It provides comprehensive training, workshops, and mentorship to enhance scholars' technical expertise, industry knowledge, and creative mastery, equipping them with the skills to excel in animation and game development.

Technology has made storytelling more experiential, immersive, and gamified.

Devices for immersive technologies like Virtual Reality, (VR) Augmented Reality (AR), and Mixed Reality (MR) have become more affordable and accessible to consumers. Immersive technologies offer unique, transformative experiences by promoting new and meaningful emotions, skills, and understanding.[13] They also offer prospects more personalized content and advertisements, whether for films, gaming, or even museums and cultural sites. Gamification is transforming the creative experience by allowing the audience to participate in stories through the metaverse. Looking ahead, these developments are expected to drive the growth of the metaverse, which could generate $5 trillion in value by 2030.[14] It can potentially revolutionize the creative economy for digital users.

Amidst digital expansion, data privacy emerges as a significant threat, with the potential for breaches compromising sensitive information of both creators and consumers. Further, the proliferation of AI technologies challenges the distinction between genuine

13 Cocorocchia, Claudio, Jonathan Dunn, Stefan Hall, and Ryo Takahashi. "How Do Emerging Technologies Affect the Creative Economy?" McKinsey & Company, April 4, 2018.

14 McKinsey & Company, Value Creation in the Metaverse (McKinsey & Company, June 2022).



Pinyapel, a packaging solution by Ideatechs Packaging Corporation, repurposes pineapple leaves to promote sustainability. This innovative local product reflects a commitment to a waste-free future, empowering communities through *malasakit* (compassion). Pinyapel's environmental impact earned global recognition, winning the prestigious Wood Pencil Award at the D&AD Future Impact Awards 2019.

and artificial creative works. This threatens creative authenticity and introduces ethical issues related to content use and Intellectual Property ownership.

SUSTAINING DEVELOPMENT

The United Nations 2030 Agenda for SDGs is a global commitment by 193 nations to reduce carbon emission by 2030. Despite public and private climate targets and the potential of the green economy to create 5 million new jobs, overall progress in Southeast Asia has actually fallen short.

The creative industries play a vital role in developing climate solutions and eco-innovations. While achieving carbon neutrality might be challenging, certain sectors, such as fashion, museums, and craft and design, have begun adopting and promoting practices that minimize their environmental impact. These industries are fostering circular designs, promoting sustainable materials, and inspiring zero-waste production methods. Collaborations with environmental organizations raise awareness and increase climate advocacy among the public.

However, the creative industries also have a notable climate impact. Sectors like fashion, film, and digital media contribute to carbon emissions through energy-intensive production processes and global supply chains. Events such as festivals and exhibitions often involve extensive travel and infrastructure, further exacerbating their environmental footprints. Digital technologies, including data storage and streaming platforms, consume vast amounts of energy and generate electronic waste.[15]

15 Julies Bicycle, "Creative Industries and the Climate Emergency - Creative Industries Policy and Evidence Centre," Creative Industries Policy and Evidence Centre, April 16, 2024.

A Global Policy Agenda

In an increasingly interconnected world, the creative industries have emerged as a vital force shaping economies, societies, and international relations. Recognizing their multifaceted role, governments and international organizations have begun integrating creative industries into policy frameworks, positioning them at the core of long-term development strategies.

As an economic and innovation driver

The creative industries are recognized as significant contributors to economic growth and employment.

It fosters creativity, experimentation, and new ideas, driving innovation across sectors. Strategies became even more critical following COVID-19, which negatively impacted not only creative activities but many other industries.

Countries like South Korea used their creative industries strategy to inform pandemic recovery, focusing on sectors with high growth potential and global demand, such as K-pop, gaming, film, and digital content production.

As a basis for international relations

The creative industries are powerful tools of soft power, enhancing a nation's cultural brand and diplomacy.

Governments leverage cultural assets to build international prestige, foster mutual understanding, and influence global perceptions. Japan's "Cool Japan" strategy successfully leveraged its cultural exports, such as anime, manga, and J-pop, to enhance the country's global influence and promote positive perceptions of Japanese culture worldwide, contributing to increased tourism, cultural exchange, and economic opportunities.

As a cultural right

The creative industries foster cultural expressions and preservation, community identity, and social inclusion.

One criticism of many creative industries strategies is they focused too much on exports and trade. More recent approaches now emphasize the role of creative industries in fostering well-being in society, highlighting culture's intrinsic value as a human right. This implies that culture should be accessible, enjoyed, and conserved by everyone regardless of economic status or background. The EU's Creative Europe program, for example, supports cultural and creative sectors across member states, emphasizing accessibility, diversity, social integration, and cross-border cooperation.

As a pillar for sustainable development

In recent years, international organizations like UNESCO and the British Council have started advocating for the recognition of the cultural and creative industries for their crucial role in achieving the UN's 2030 SDGs. Indonesia's Creative Economy Agency (BEKRAF) emphasizes this in its 2023 plan to promote green tourism and eco-heritage regeneration.

THE PHILIPPINES IN THE GLOBAL STAGE

Several global indices provide benchmarks to assess the performance of the Philippine creative industries.

The Global Innovation Index (GII), published by the World Intellectual Property Organization (WIPO), offers insights into the global innovation landscape, assessing institutions, human capital and research, infrastructure, creative outputs, and other factors. The GII defines innovation as the creation and implementation of new products, processes, or services that improve efficiency and competitive advantage.

In 2024, the Philippines ranked 53rd among 132 economies, climbing 3 notches from 56th in 2023. It placed 3rd among the 38 lower middle-income group economies and 11th among the 17 economies in Southeast Asia, East Asia, and Oceania. Overall, the country ranked highest in business sophistication (placing 37th), and knowledge and technology outputs (42nd).

However, weaker areas included institutions (65th), market sophistication (77th), human capital and research (84th), and infrastructure (84th). In terms of creative output, the Philippines ranks 60th, behind regional peers such as Singapore (19th), Vietnam (34th), Thailand (38th), and Malaysia (49th).

In creative goods exports, the Philippines ranked 14th within the ***South East Asia, East Asia, and Oceania Regions***, indicating the nation's strong standing in global trade. There is still an opportunity to gain leadership, as the country trails behind its regional peers such as Thailand (1st), Malaysia (1st), and Vietnam (7th).

UNCTAD regularly produces a global creative economy outlook report. In 2015, the Philippines ranked 10th among the developing countries in creative goods exports and was recognized for its vibrant sectors in music, film, and design. However, the country faces challenges such as underemployment and insufficient infrastructure.

Within UNESCO, the 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions is a legally binding instrument that believes in a holistic way of defining the creative industries, but notably, the need to support (1) diverse cultural expressions and content and (2) balancing trade and cultural exchange between the Global North and South. The Philippine government has recently ratified the treaty and stands to benefit greatly from this. On the other hand, the UNESCO Creative Cities Network report of 2023 highlights the country's vibrant urban creativity with Baguio designated as a Creative City of Crafts and Folk Art, Cebu as a Creative City of Design, and Iloilo as a City of Gastronomy. These designations underscore strong engagement from local government officials, cultural organizations, artists and creative professionals, the academe, local businesses, and communities.

The Nations Brands Index (NBI) measures how countries are perceived globally, impacting areas such as tourism, investment, and export potential. The Philippines ranks 48th out of 60 economies in the 2023 NBI[16] (see Table 4).

In the 2024 edition of the Global Soft Power Index,[17] **the Philippines climbed nine spots to 52nd place out of 193 nations, with an overall index score of 39.8 out of 100**. The index, compiled by brand valuation consultancy firm Brand Finance, ranks nations based on their "soft power" or ability to influence others through persuasion and attraction.

Lastly, the creative industries are key to advancing sustainable development by bringing together different disciplines, influencing public perception, and imagining new ways of solving the country's complex climate-related problems. As of 2023, less than 20% of the Philippines targets were progressing, while nearly 30% were regressing.[18] Finite resources, sustainability regulations, and changing modes of production pose risks to the future of creative industries, especially in a country like the Philippines, where many activities rely on natural materials and occur in disaster-prone areas.

Table 3

GII Ranking of the Philippines 2020-2024

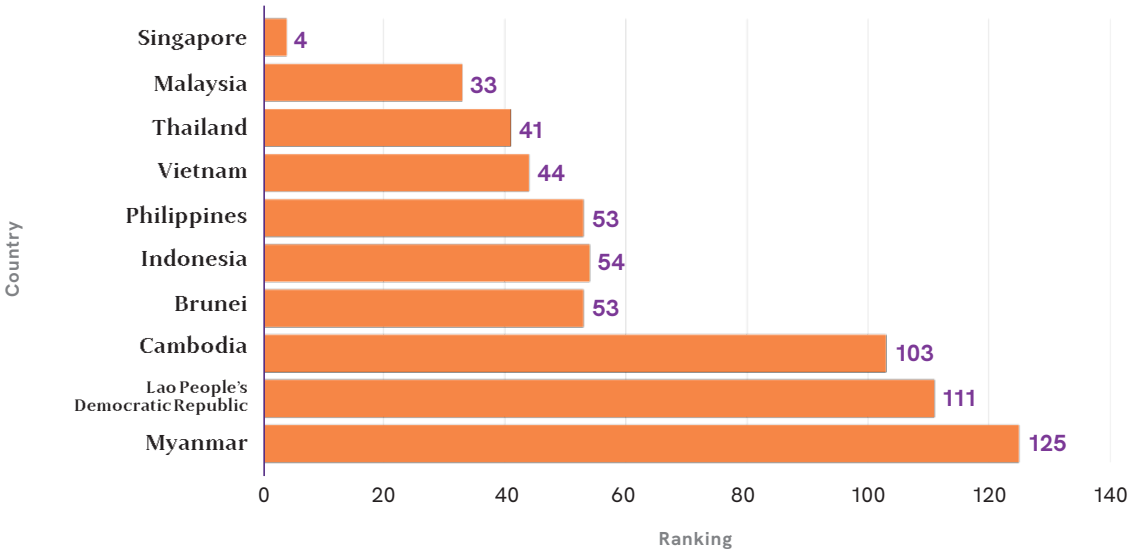
YEAR	GII POSITION	INNOVATION INPUTS	INNOVATION OUTPUTS
2020	50th	70th	41st
2021	51st	72nd	40th
2022	59th	76th	51st
2023	56th	69th	52nd
2024	53rd	67th	53rd

Source: WIPO, Global Innovation Index Database, (2024). Reformatted for presentation.

16 Simon Anholt and Ipsos, The Anholt-Ipsos Nation Brands Index: Press Release Supplemental Report (Ipsos, November 2023).
17 Brand Finance, Global Soft Power Index 2024 (Brand Finance, 2024).
18 Philippine Statistics Authority, Philippine Creative Economy Satellite Account 2023 (PSA, 2024).

Figure 23

ASEAN GII Ranking 2024



Source: WIPO, Global Innovation Index Database, (2024). Reformatted for presentation.

BUILDING A CREATIVE HUB THAT IS LOCALLY EMBEDDED AND GLOBALLY INTERCONNECTED

Positioning the Philippines within the global creative industries reveals a landscape of both achievements and challenges.

> The country has shown promising strides in innovation, creative goods exports, and urban creativity. However, it continues to face hurdles such as underemployment, inadequate infrastructure, and the absence of a cohesive branding strategy.

Enhancing these areas could significantly bolster the country's standing in the global creative economy.

Developing a brand based on creative activity involves leveraging unique cultural assets and creative outputs. For instance, South Korea's "K-Culture" brand, centered around its pop culture, entertainment, and technology, reached a record-high of USD 11.2 billion in 2020. K-Culture has attracted international audiences and propelled technological innovation and global market penetration. Despite this success, the country's creative industries face concerns about cultural homogenization, sustaining economic growth, and job welfare.[19]

19 Julian Ryall, "What's Behind South Koreas K-Pop Crisis?" *DW*, March 22, 2024.



Screengrab from ***Ang Kampanilya***, the winning animation entry in the Young Creatives Challenge (YC2) 2023, created by MeeProduction with team members Ma. Christina Iris Gunsay, Francesca Nicole L. Marcelino, and Joshua France Saligumba.

Animating Creativity: Unleashing the Power of Original Content in the Philippine Animation Sector

The Philippines remains a competitive location for 2D animation processes. Local animation talent and skills are well-reputed in the global industry. However, demand for original 3D animation services is increasing, requiring new skills. Developing the ability to produce original animation content, building valuable IP, and nurturing talent are essential to differentiate the Philippines in the international market.

Table 4
Nation Brands Index of Selected Countries 2023

COUNTRY	NATION BRANDS INDEX
Japan	1
South Korea	24
Singapore	26
China	31
Indonesia	44
Vietnam	47
Philippines	48

Source: Anholt Nation Brands Index (2023). Reformatted for presentation.

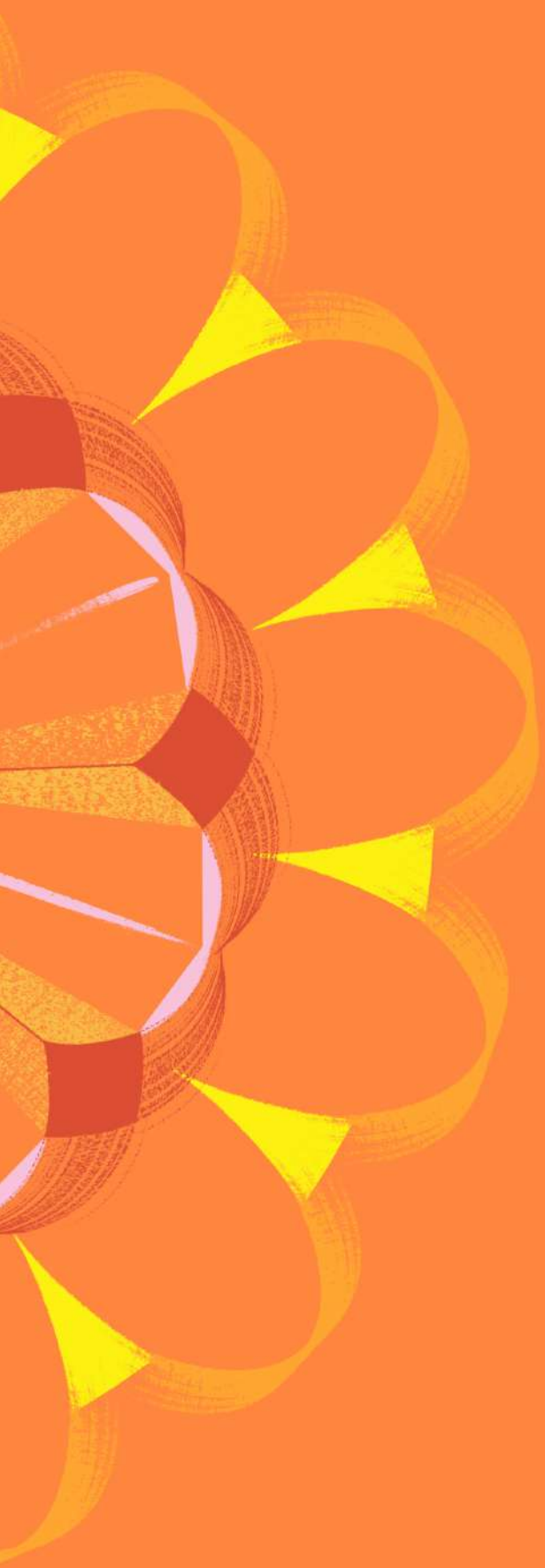
It is important to recognize that a country's brand relies on more than just exports: it is rooted in a robust local ecosystem. London's Creative Enterprise Zones program designates areas for artists and businesses, offering affordable space and support for growth and skills development. From 2018 to 2022, creative jobs within these zones grew four times faster than London City's average. Although a deeply local initiative, the program has contributed to the UK's soft power by building an international reputation for innovation and attracting global attention.

> Creating a Philippine brand that signifies quality and a unique identity could elevate Philippine-made products and services.

However, there is currently no strategic, deliberate branding initiative for Filipino creativity, except for international media campaigns led by agencies like the Department of Tourism (DOT).

Developing an offer based on original Filipino content could significantly enhance the Philippine brand to the rest of the world. This approach would position the country as a beacon of culture-led innovation and a preferred partner within the global creative community, supporting our ambition to become Asia's Premier Creative Hub by 2030 and beyond.





4

Architecting the Success Blueprint



Anchored on our vision to transform the Philippines into Asia's Premier Creative Hub, our industrial strategy is to position the Philippines as a global leader in the creative industries, driven by culture, talent, and innovation.

This section plots how we will turn this ambition into reality through a solid, responsive, and inclusive program design and implementation framework.





BEAMS

Build Creative Ecosystems

- Strengthen Global Brand
- Foster Creative Placemaking
- Improve Policy Environment

Empower Creative Workforce

- Develop Creative Talent
- Connect Creative Talent
- Protect Creative Talent

Accelerate Inclusive Innovation

- Build Innovation Centers
- Nurture Creative Startups
- Promote Technology Adoption

Mobilize Financing Support

- Establish Industry Funds
- Provide Fiscal Incentives
- Access International Financing

Seize Market Opportunities

- Attract New Investments
- Boost Trade Performance
- Expand Global Partnerships

CLUSTERING * INNOVATION * INCUBATION

BEAMS FRAMEWORK

The Plan is committed to supporting diverse stakeholders by fostering an environment conducive to growth and innovation. The Philippine creative industries are made up of artists, startups, creative enterprises, business partnerships, and other value chain actors in different stages of growth. Being aware of their unique make and needs, the Plan will function not only to reap 'low hanging fruits' but employ a long-term view for building the creative industries from the ground up.

The Plan has created five pillars to help achieve our priorities. They also function to support individuals, startups and emerging creative practices through incubation and innovation. In addition, an industry cluster approach will be used to create synergies across the value chains of different creative industries and related sectors, particularly in technology, tourism, and manufacturing.

The Five pillars serve as the fundamental building blocks upon which the entire strategy is constructed.

BENEFICIARIES

- ARTISTS
- ARTISANS
- CREATORS
- CREATIVE WORKERS
- CONTENT PROVIDERS
- CREATIVE FIRMS
- INDIGENOUS CULTURAL COMMUNITIES
- OTHER STAKEHOLDERS IN THE CREATIVE INDUSTRIES

The pillars are interconnected and will build upon one another. Each one is essential to the overall architecture of the framework and each one is underpinned by three sub-pillars, which house the strategic actions necessary for achieving the Plan. The BEAMS Framework is grounded in the Incubation-Innovation-Clustering approach.

Incubation

Through **Incubation**, the Plan provides a supportive environment for new ventures to develop, e.g., through mentorship, skills-building, funding, and infrastructure that nurtures ideas from concept to market-ready solutions.

Innovation

Through **Innovation**, the Plan works to foster a collaborative ecosystem where new products, services, and processes can emerge, supported by academia, industry, and government. This approach enhances the ability to tackle complex challenges and drives the development of groundbreaking solutions.

Clustering

Lastly, through **Clustering** approach, the Plan seeks to identify and focus on industries with high potential for scalability and economic growth. It encourages businesses, institutions, and related sectors to work together and create synergies through interconnected value chains.

Pillar 1

Build Creative Ecosystems

PILLAR 1 SUCCESS INDICATORS

- **Strengthened global soft power**
- **Increased local participation**
- **Enhanced policy-making and research capacity**

A dynamic creative ecosystem thrives in an environment that supports artistic and cultural expression, creative entrepreneurship, and innovation. Strategic policymaking at both the national and local levels is at the heart of this objective. This involves crucial elements that facilitate the cultivation of cultural activities and the promotion of the success of creative businesses and professionals.

1.1. **Strengthen Global Brand.** The Philippine creative sector needs a brand that reflects the high quality, uniqueness and rootedness of Filipino creative content, goods, and services. A solid brand can inspire local engagement and increase the nation's soft power. The PCIDC will:

1.1.1. Integrate cultural heritage into the Philippine creative industries and develop a consistent brand inspired by the country's uniqueness and values.

1.1.2. Identify and create a pipeline for creative outputs that can reach new markets and audiences, both domestically or internationally.

1.1.3. Evaluate target markets and develop with key partners to globally promote the pipeline alongside the country brand.

1.2. **Foster Creative Placemaking.** The Philippine creative sector needs cultural spaces that stimulate creativity, participation, and local growth. Success will depend on strong cross-sectoral engagement between local governments, the academe, creative communities, local businesses, and the public. The PCIDC will:

1.2.1. Organize and support festivals, conferences, and other real-time live events, promote local cultures, encourage international exchange, and inspire the development of emerging practices.

1.2.2. Create transparent and systematic frameworks to support the establishment of creative spaces and hubs in and beyond urban areas.

1.2.3. Establish open, free, accessible, and well-designed platforms



that encourage local artists and creative industry players to practice, enhance, and showcase their work.

1.3. **Improve Policy Environment.** The government should optimize investment through transparent, corruption-free, and business-friendly policies that maximize impact. The PCIDC will:

1.3.1. Develop consistent methods to benchmark, measure, and monitor the economic and social impact of the creative industries at national, regional, and local levels.

1.3.2. Cultivate a culture of evidence-led and inclusive policy-making by building a pool of experts, researchers, and think tanks specializing in art, culture, and the creative economy.

1.3.3. Streamline and align the plans of the government, including local government units, with those of the private sector.

1.3.4. Prioritize policies that improve ease of doing business and promote equity for marginalized and vulnerable groups.

The Department of Trade and Industry (DTI), in partnership with the National Commission for Culture and the Arts (NCCA), the British Council in the Philippines, and Victorias City, hosted the Creative Placemaking Dialogue and Capacity Building on 17 December 2024.

The session centered on the integration of arts and culture into urban development, exploring how creative placemaking can foster sustainable cities and elevate community life.

Facilitated by DTI, NCCA, and the British Council, the workshop aimed to engage local creatives and gather valuable insights on the challenges and needs they face in developing spaces that encourage collaboration and support their artistic endeavors.

PILLAR 2 SUCCESS INDICATORS

- Improved job welfare
- Enhanced training programs
- Upskilled workers
- More resilient jobs

Pillar 2
Empower Creative Workforce

A creative nation requires an empowered workforce. This requires fostering an environment that promotes creativity, enables career growth, and protects professionals from exploitation and unfair work practices. The key to this is education and upskilling to create more resilient jobs, as outlined separately in a Creative Educational Plan, as mandated by the PCIDA. Crucially, leaders in the creative sector must be supported so they can better sustain creative activity and support artists from the ground up.

2.1. **Develop Creative Talent.** Working with both formal and informal educational stakeholders, the PCIDC will help nurture talent through a modern education and skills development system. This system will hone creative abilities from early development through advanced and lifelong learning, both inside and outside the formal school system. A well-supported learning pathway can inspire students to pursue creative education tracks, while creating multiple avenues for skills acquisition, accreditation, and certification incentivize creative professionals to upskill and reskill. The PCIDC will:

2.1.1. Inculcate foundational creative core values in all Filipino learners at all levels, including a deep appreciation for the arts, local and regional culture, creative thinking, Filipino identity, intellectual property, and the creative economy.

2.1.2. Develop entrepreneurial skills, values, and mindsets among Filipino learners in artistic and creative tracks.

2.1.3. Provide programs and comprehensive support systems to students enrolled in art high schools or those pursuing creativity-related tracks in high schools, universities, and college, while offering pathways to pursue creative careers.

2.1.4. Establish standard practices for creative industry professionals, strengthen technical-vocational training, advocate alternative pathways

for education, training, learning, upskilling, and certification.

2.1.5. Develop strategic leadership and business management training programs for managers and creative leaders driving creative activity from the ground up.

2.2. **Connect Creative Talents.** The Plan will harness the economic potential of the creative workforce by bridging the gap between individuals and industry opportunities. This includes facilitating networking and collaboration through platforms and events, addressing job-skills mismatches with targeted training and upskilling programs, and exposing talents to diverse career pathways within the industry. These efforts will empower workers and ensure that their skills are fully integrated into the industry ecosystem. The PCIDC will:

2.2.1. Link students and trainees to internships within the creative industries that will expose them to real-world projects and applied settings.

2.2.2. Connect creative workers and entrepreneurs with experienced professionals in the creative industries for reskilling and upskilling.

2.2.3. Facilitate the collaboration and opportunities among creative industry players, potential partners, and clients.

2.2.4. Lay the groundwork for full employment of the creative workforce by encouraging investments in creative jobs and addressing jobs-skills mismatch issues, among others.

2.2.5. Develop regional creative clusters that foster collaboration between local creative talents and industry leaders, promoting regional diversity and specialization.

2.3. **Protect Creative Talents.** The Philippine creative sector can protect its talents by safeguarding their rights, ensuring fair compensation and recognition, and providing a supportive and inclusive environment that fosters their growth and well-being. The PCIDC will:



The 2nd Philippine International Copyright Summit (PICS), an annual five-day event organized by the Intellectual Property Office of the Philippines (IPOPHL), was held from October 21-25, 2024, at Novotel Manila Araneta City.

As the country's largest copyright event, led by IPOPHL's Bureau of Copyright and Related Rights, the summit centered on the theme "Unlocking the Future: Tech Trends and Challenges in Copyright." The discussions delved into the intersection of copyright law and emerging technologies, such as artificial intelligence, and examined their profound impact on the creative industries in the Philippines and beyond.

2.3.1. Raise awareness among creative industry players about their intellectual property rights and support them in protecting their creations.

2.3.2. Intensify the implementation of anti-piracy measures and enforcement mechanisms to combat unauthorized use, reproduction, and distribution of creative works.

2.3.3. Establish or strengthen policy and legal mechanisms that enforce and recognize the rights of creative industry players, including fair compensation, legal benefits, and work conditions.

2.3.4. Strengthen the intellectual property ecosystem to promote and protect innovation and creativity.

Pillar 3

Accelerate Inclusive Innovation

Innovation drives the growth of the creative industries. To ensure impact, access to innovation tools and infrastructure must be broadened, which requires going beyond the usual support systems. This involves engaging rural and not just urban areas, bridging the digital divide, and ensuring that opportunities are available to all sectors of society. Key actions include establishing state-of-the-art facilities for ideation and creative thinking in key geographic regions, promoting technology adoption across creative enterprises, and supporting creative startups in optimizing intellectual property.

PILLAR 3 SUCCESS INDICATORS

- Stronger industry-academe partnerships
- Digitally transformed creative enterprises
- Eco-innovations supported

3.1. **Establish Innovation Centers.** The Philippine creative sector needs innovation centers that welcome diverse, creative talent and entrepreneurs, especially those from marginalized and underrepresented groups. These centers will function as incubators for new ventures, product R&D, and capacity-building. The PCIDC will:

3.1.1. Cultivate a culture of innovation, disruption, critical thinking, and problem solving with a strong social impact mindset.

3.1.2. Initiate lighthouse projects to build creativity and innovation centers tailored to the regional creative industry landscapes.

3.1.3. Invest in specialized national creative laboratories for domains such as virtual reality, animation, and interactive media, in partnership with the private sector.

3.1.4. Develop creative and innovation hubs nationwide to attract talents and entrepreneurs, fostering a collaborative network.

3.1.5. Collaborate with higher education institutions (HEIs) and research and technology institutions to create interdisciplinary innovation hubs that blend technology, arts, and business.

Mindanao State University – Iligan Institute of Technology (MSU-IIT), known for its focus on engineering, science, and technology, is home to the MSU-IIT FAB LAB Mindanao. The lab is designed to be a space where researchers in these fields can create prototypes of their designs. Equipped with advanced tools, the lab also supports product development for science and technology researchers, as well as small and medium enterprises in the region.

As Mindanao's first digital fabrication laboratory, MSU-IIT FAB LAB Mindanao plays a crucial role in helping local researchers and businesses bring their ideas to life through physical prototypes.

The lab has also bridged the gap between creativity and technology, serving as the collaborative space for Digital Artisans participants, FABLAB managers, and the Design Center of the Philippines' partners and experts.



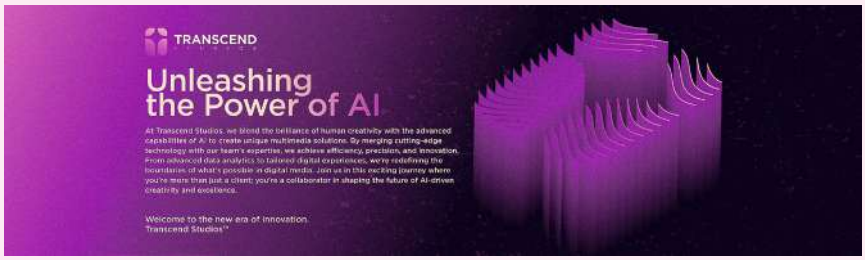


3.2. **Nurture Creative Startups.** The Philippine creative sector needs a vibrant creative startup ecosystem with firms that can expand employment and value creation. Creative startups are high-potential ventures with strong growth trajectories due to their innovative concepts or cutting-edge technologies. Their growth ensures the continuous transformation of the industry. The PCIDC will:

3.2.1. Organize competitions and challenges to discover new talents, innovative ideas, and creative content.

3.2.2. Develop and implement incubation and acceleration programs, including mentorship and internationalization for creative startups.

3.2.3. Establish a robust network of private sector investors to support creative ventures.



Transcend Studios was one of the selected elite startups for the DTI's Incubation, Development, and Entrepreneurial Assistance (IDEA) for Creatives Program in 2024.

3.3. **Promote Technology Adoption.** With the help of technologies such as Web3, artificial intelligence, and augmented reality, among others, the Philippine creative sector can streamline workflows and enhance collaboration to deliver personalized, immersive experiences to audiences. The PCIDC will:

3.3.1. Promote industry-academe collaboration for creative experimentation, research and development, technology adoption, and commercialization.

3.3.2. Provide training programs to help creative enterprises adopt digital technologies.

3.3.3. Create specific grants to support technology adoption in creative enterprises and derisk their investments.

3.3.4. Develop digital transformation strategy for the creative industries, focusing on training and support for adopting new technologies.

The IDEA for Creatives Program is one of DTI's flagship initiatives designed to nurture and support innovative startups during their product launch, commercialization, and scaling-up stages. It aligns with the goals of the Innovative Startup Act (ISA) and the PCIDA to foster a competitive creative ecosystem.

The IDEA for Creatives Program has capacitated 10 early-stage startups, including Produkto PH, Brave Story, Pamitisan Shoe Shop, Denim N' Denim, Kwentoon, MVRK Simulations, Palaro App by 7x7 Development Corp., Wika, and Carisle Media Corporation—all poised to make a significant impact on the creative landscape.

Pillar 4

Mobilize Financing Support

PILLAR 4 SUCCESS INDICATORS

- Increased access to capital
- Emerging practices funded
- New intellectual property optimization initiatives

Creative talents, firms, and startups require financial support to unlock opportunities, sustain operations, and reach their full potential. The creative sector, encompassing artistic creations, digital content, and innovative outputs, faces numerous risks throughout the journey from ideation to commercialization. These risks often exceed the internal capacities of many talents and firms to manage alone. Government and external financial support are crucial for helping large-scale ventures go to market and achieve commercial viability. The PCIDC will:

4.1. **Boost Funding Support.** Adequate and appropriate financing mechanisms are key ingredients in helping creative professionals and enterprises grow and scale. Hence, the financial sector must be able to offer flexible financing modalities to support creative businesses under varying circumstances and at different stages of their development. The PCIDC will:

4.1.1. Increase allocation for the Creative Venture Fund, which serves as a public-private equity fund providing long-term capital for strategic investments in the creative industries and creative startups.

4.1.2. Establish grant funds to support creative projects and initiatives, such as content development, research and development, and marketing.

4.1.3. Develop a loan fund with low interest rates and flexible and innovative repayment terms to provide accessible and affordable financing options for creative industry players.

4.1.4. Improve regulations around private financing to promote ease of investment in creative industry firms and projects.

4.1.5. Develop a national grant program that supports experimental and high-risk creative projects, fostering innovation and creativity.





Lunsod Lunsad is a flagship program of the Malikhaing Pinoy Program (MPP), which aims to further develop the country's creative industries by empowering creatives and fostering environments that enable them to shape the cultural, creative, and economic landscapes of cities. By supporting the pursuit of art and profession, the program encourages innovation and growth within the creative sector.

4.2. **Provide Fiscal Incentives.** The Philippine creative sector must take advantage of existing tax incentives, such as tax credits, deductions, and reduced rates under the Corporate Recovery and Tax Incentives for Enterprises Act (CREATE) Act. The government can further incentivize and stimulate quality investment in the creative sector by providing financial relief and encouraging risk-taking. The PCIDC will:

- 4.2.1. Increase tax incentives for promising creative enterprises.
- 4.2.2. Expand tax relief measures for creative professionals and enterprises, including deductions for expenses related to creative production and research.
- 4.2.3. Implement a creative industries tax credit program that rewards companies investing in local creative talent and productions.
- 4.2.4. Improve access to education about available financial incentives for creative industry players.

4.3. **Access International Financing.** International financing offers vast opportunities for investment, grants, and economic initiatives. Beyond financing, partnerships with international organizations bring global knowledge, expertise, technology, and networks that facilitate global market access, global audience engagement, and the export of creative products and services to diverse markets. The PCIDC will:

- 4.3.1. Forge partnerships with governments, international organizations, foundations, and NGOs to access global financing resources for creative initiatives.
- 4.3.2. Develop mechanisms for creative businesses to participate in international funding programs and competitions.
- 4.3.3. Facilitate connections between local creative enterprises and international investors, venture capital firms, and financial institutions to broaden access to international financing opportunities.

Pillar 5

Seize Market Opportunities

PILLAR 5 SUCCESS INDICATORS

- Expanded international partnerships
- New bilateral/ multilateral trade agreements
- Intensified support for sustainable practices

The Philippine creative industries must harness the vast global market for creative outputs while leveraging the country's substantial domestic market as a foundation. A strategic global marketing approach focused on priority creative industries clusters is vital for regional and international market penetration. Equally critical is expanding the domestic market to ensure a robust and sustainable base for growth. Enhancing domestic demand, nurturing local talent and innovation, and increasing the visibility and accessibility of Filipino creative products and services will establish a resilient foundation to support local and international growth. Strategic efforts to promote local content consumption, support MSMEs, and stimulate investment in domestic creative ventures will invigorate the Philippine creative ecosystem and propel economic development. Expanding international engagement and exchange will further drive local economic growth by introducing new opportunities, fostering innovation through exposure to global trends, and attracting foreign investments that can stimulate further development in the domestic market.



First Lady Liza Araneta-Marcos graced the opening of the 3rd edition of *Likha*, themed *Likha Ko, Lahi Ko*, in celebration of the Philippines' 126th Independence Day. The exhibit, held from June 7-11, 2024, at the Philippine International Convention Center (PICC), highlighted Filipino traditional crafts and their relevance today. The event showcased the work of 87 local weavers, designers, and artisans, providing a platform to connect and preserve the legacy of Philippine arts and crafts.

5.1. **Attract New Investments.** The Philippine creative sector must accelerate both foreign direct investments (FDIs) and domestic investments in the Philippine creative industries to expand job creation and increase value generation. FDIs, along with local investments, can revitalize the creative ecosystem by generating substantial spillovers, such as the transfer of global and local knowledge, skills, and expertise, which can elevate the country's quality of creative outputs.

Domestic investments are crucial in nurturing local talent, enhancing infrastructure, and building resilient creative industries that can flourish despite global challenges. Additionally, strong participation in global production and distribution channels, driven by both foreign and domestic investors, deepens the country's involvement in the global value chains of creative production. The PCIDC will:

5.1.1. Implement and amplify a tiered, targeted investment promotion campaign to showcase opportunities in the creative industries to both foreign and domestic investors.

5.1.2. Conduct international and local roadshows and investment forums to connect with potential investors and highlight the benefits of investing in the Philippine creative industries.

5.1.3. Establish a dedicated office and one-stop shop to attract and facilitate investments in creative ventures, ensuring streamlined support for both foreign and domestic investors.

5.1.4. Develop bilateral agreements with key countries to promote mutual investment in creative industries, facilitating easier market entry and exchange of expertise, while also encouraging local partnerships.

5.1.5. Build capacity and assist creative industry players in navigating and utilizing existing foreign trade agreements (FTAs) to attract foreign investments and provide guidance on how these agreements can lower trade barriers, reduce tariffs, and open up new markets for creative products and services.

5.2. **Boost Trade Performance.** The Philippine creative sector will take advantage of local and global market trends, especially in the digital and green economies. Embracing international markets will expose enterprises to global trends and help them adapt to fast-changing consumer preferences and demands. The PCIDC will:

5.2.1. Position the government as a leading supporter and major buyer of local creative goods and services.

5.2.2. Strengthen the presence of Filipino creatives, products, and services in targeted markets by enhancing online presence and participating in domestic and international trade promotion activities.

5.2.3. Implement export acceleration programs to support domestic creative businesses in entering international markets.

5.2.4. Strengthen tourism service exports by positioning the Philippines as Asia's hub for creative industries in tourism..

5.2.5. Develop strategic alliances with global digital platforms to increase the visibility and distribution of Filipino creative content.

5.3. **Expand Global Partnerships.** The creative sector needs to deepen its global cooperation to thrive in an increasingly interconnected world. By forging robust regional and international partnerships, the Philippines can significantly enhance its influence and broaden cross-border trade and investment opportunities. This strategic focus will enable the country to play a pivotal role in global discussions and integrate more effectively into distribution networks for creative content and products. The PCIDC will:

5.3.1. Foster bilateral and multilateral agreements and economic cooperation with other countries to enhance collaboration in the creative industries.

5.3.2. Pursue partnerships with international organizations such as WIPO and UNESCO and take advantage of international treaties like the UNESCO 2005 Convention on the Diversity of Cultural Expressions, which aim to give preferential treatment in the trade of cultural goods to developing countries like the Philippines.

5.3.3. Invest in cultural diplomacy by supporting international exhibitions, festivals, and exchanges to showcase the diversity of Filipino creative expressions.

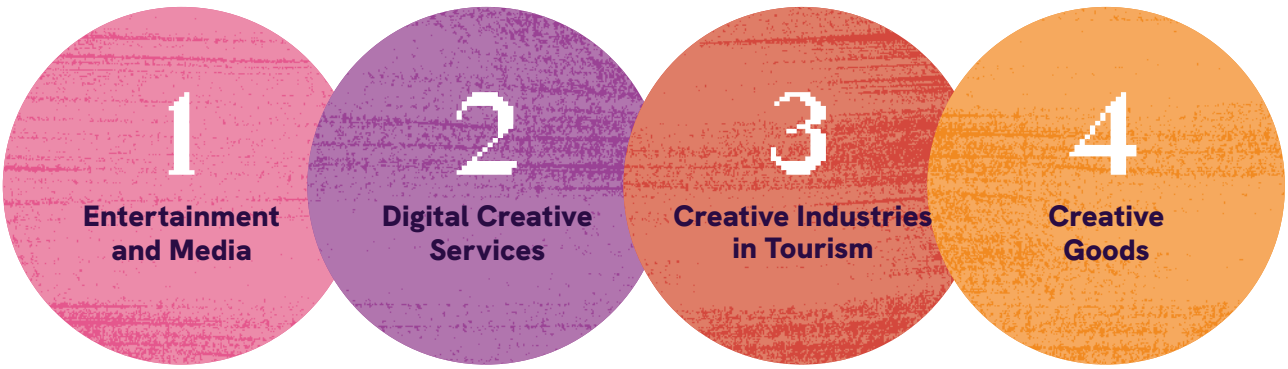
5.3.4. Foster exchange programs and residencies for Filipino creatives to work abroad and for international creatives to work in the Philippines, promoting cross-cultural collaboration.

OPTIMIZING IMPLEMENTATION THROUGH CLUSTERING

An industrial clustering approach can be instrumental in creating dynamic ecosystems that enhance resource sharing, industry efficiency, supply chain robustness, and innovation.[1] From a governance perspective, this approach facilitates a more cohesive and coordinated strategy for penetrating global markets.

With content at the core, the flow of inputs and outputs between creative sectors transcends geographic boundaries and fosters dynamic linkages, especially in the digital realm. For instance, published media such as books and novels can be adapted into films and games, thereby expanding their market reach. Similarly, music and animation serve as crucial inputs for films, while economic activities within film production can spill over into related industries, such as furniture for set design or tourism through on-location shoots. This high degree of interconnectedness amplifies the potential for value creation through the cross-pollination of ideas and innovations.

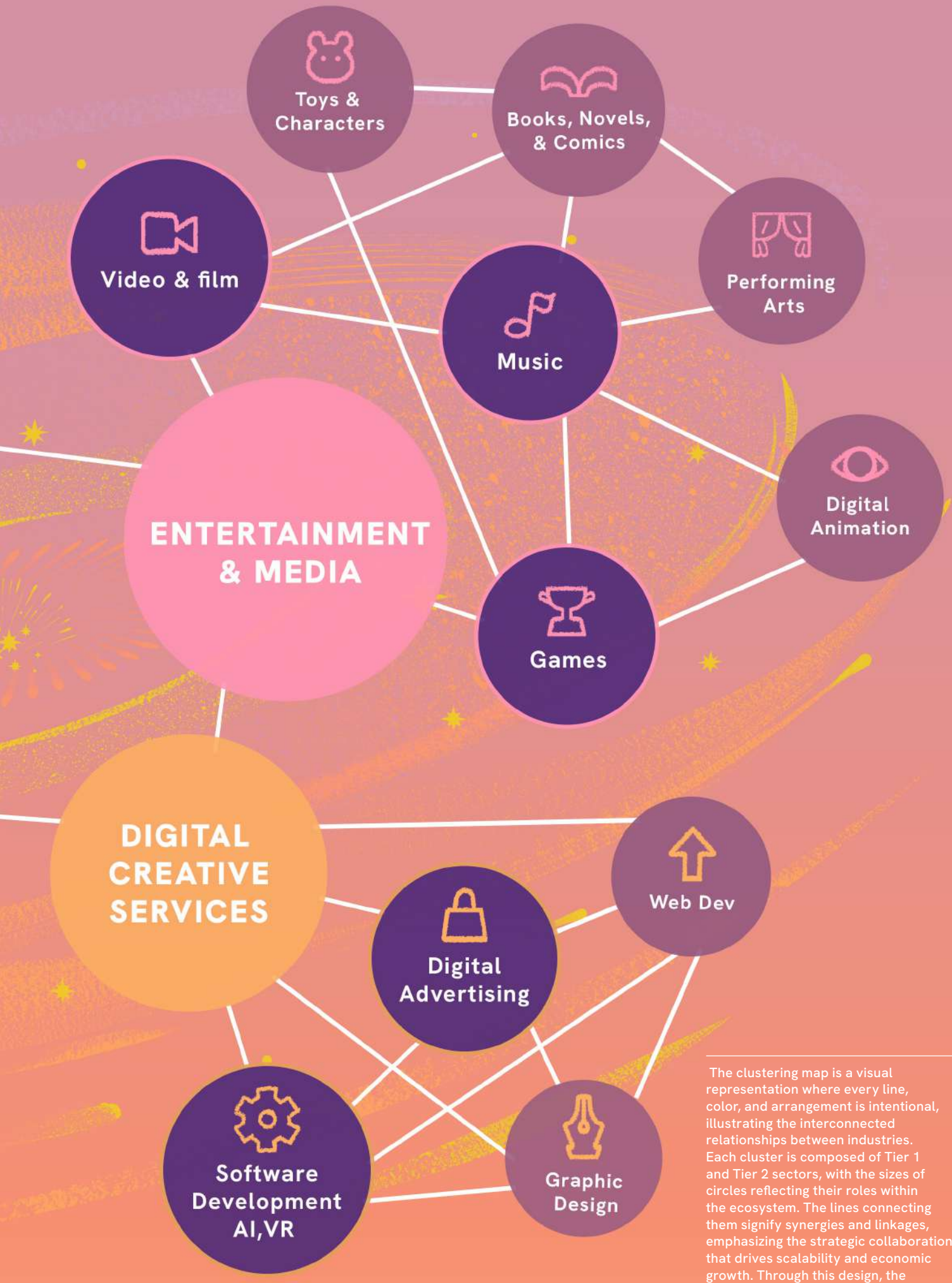
Drawing on the concept of clustering, the Plan aims to enhance the Philippine creative industries by organizing them into four major clusters. Each cluster includes Tier 1 and Tier 2 sectors derived from various domains identified by the PCIDC. The selection of these clusters is driven by their global growth potential, existing industrial capabilities or strong potential for expansion within the Philippines, capacity to generate spillovers to other creative sectors, and the presence of robust institutional support.



1 Theo J. A. Roelandt and Pim den Hertog, "Cluster Analysis and Cluster-Based Policy Making: The State of the Art," in *Boosting Innovation: The Cluster Approach*, OECD Proceedings, ed. Organisation for Economic Co-operation and Development (OECD, 1999), 413–425.

Figure 24
Priority Creative Industries





The clustering map is a visual representation where every line, color, and arrangement is intentional, illustrating the interconnected relationships between industries. Each cluster is composed of Tier 1 and Tier 2 sectors, with the sizes of circles reflecting their roles within the ecosystem. The lines connecting them signify synergies and linkages, emphasizing the strategic collaboration that drives scalability and economic growth. Through this design, the illustration conveys how creative industries work together within an integrated value chain.

Table 5

Priority Creative Industries Clusters

CLUSTERS	TIER I SECTORS	TIER II SECTORS
Entertainment and Media	Video and film Music Games	Books, Novels, & Comics Performing Arts Digital Animation Toys & Characters
Digital Creative Services	Digital Advertising Software Development (including Artificial Intelligence and Virtual Reality Development)	Graphic Design Web Development
Creative Goods	Fashion Furniture Visual Art Objects	Accessories/Jewelry Textile Footwear Indigenous Materials
Creative Industries in Tourism	Creative Cities	Architecture Cultural Sites Festivals Food and Gastronomy

Cluster 1

Entertainment and Media

This cluster focuses on the interaction of Film, Video, Music, Games, and Performing Arts. As the most popular mode of delivering creative content, these industries form the locus of industrial policy for any country aspiring to penetrate the global creative sector. Closely allied sectors include books and novels, digital animation, and toys and characters.

Video and film often serve as platforms for showcasing music, with soundtracks and scores enhancing storytelling. Similarly, films and games frequently draw narratives from books and novels. Animation, as a medium, bridges the gap between visual storytelling and interactive experiences, influencing both video/film and games. Additionally, toys and characters often originate from popular narratives in video/film, books, games, and animation, becoming cultural icons that extend into various media forms.

The performing arts market has seen steady growth due to the increasing popularity of live performances, demand for unique experiences, and advances in digital technology. Regional theaters, dance troupes, touring companies, and independent artists contribute at various scales. Digital technology has facilitated streaming, online ticketing, and virtual experiences. Performing arts organizations are now focusing on interactive experiences, educational programs, and community outreach.

Collectively, these industries propel the growth of the cluster. Owing to their popularity to consumers, these are the industries with the highest growth potential in terms of projected value:

- The global gaming industry market expanded by 26% between 2019 and 2021 and is projected to be worth USD 321 billion by 2026, according to PwCs Global Entertainment and Media Outlook 2022–2026.[2]
- Global revenues from TV and film content comes close in terms of performance which reached USD 79 billion in 2021, a 14% increase from 2020, as reported by Motion Pictures Association in 2022. In a related study, another report projects that the film and video market

2 World Economic Forum, "Gaming is Booming and is Expected to Keep Growing. This Chart Tells You All You Need to Know," *The Agenda Weekly*, July 28, 2022.

is expected to grow at a CAGR of 5%, reaching USD 345 billion in valuation by 2027.[3]

- Meanwhile, the global recorded music revenues saw a tenth consecutive year of growth in 2024, up 4.8% to US$29.6 billion. [4]
- The global market for performing arts companies is expected to reach USD 193.38 billion in 2024 and USD 254.78 billion by 2029, growing at a CAGR of 5.67% from 2024 to 2029. North America has the largest market, while Asia-Pacific is the fastest growing region.[5]

Currently, the Philippine entertainment sector caters to the domestic market, with a few occasional global hits. Meanwhile, digital animation and game development activities are mostly on outsourcing for service exports. Additionally, local performing arts organizations often struggle with an inferior image compared to international productions, and widespread piracy and infringement of intellectual property rights remain significant challenges.

To fully capture the value created in these industries, the government will stimulate the development of original Filipino content that meets global standards and preferences. Strengthening distribution channels through international partnerships and optimizing intellectual property through copyrights, licenses, and royalties, promise a viable way to diversifying and scaling business revenue. This will entail investments in innovation, skills development, and promotions in existing and new international markets. These efforts should be undertaken alongside protecting and enforcing the intellectual property rights of creative industry players.



From Left to Right: *Hello, Love, Again* (2024), Philippines' Top Grossing Film; SB19 - A Filipino Boy Band leading act in contemporary Pinoy Pop; BAYANI is a 1-on-1, indie fighting game that is heavily inspired by the Philippines' rich history, culture, and mythology.

Cluster 2

Digital Creative Services

The digital creative services encompass a diverse ecosystem of businesses offering web design, digital marketing, graphic design, and software development. These are highly scalable and integral to various industries, providing essential digital solutions to a global clientele.

3 The Business Research Company, Film and Video Global Market Report (The Business Research Company, January 2024).
4 International Federation of the Phonographic Industry (IFPI), Global Music Report: State of the Industry (IFPI, 2025).
5 Mordor Intelligence, *Performing Art Companies Market Size: Industry Report on Share, Growth Trends & Forecasts Analysis (2024-2029).*





The Philippines' IT and software development sectors are experiencing significant growth, as supported by a robust global IT-BPM industry and a tech-savvy young population. With over 400 software establishments,[6] primarily from U.S. and European multinationals, the country is well-positioned in the enterprise application segment. Startups also focus on software solutions for diverse vertical markets, such as finance, retail, healthcare, and social media.

AI is revolutionizing the creative services landscape, enabling graphic designers to generate visual assets, optimize user interfaces, and personalize content more efficiently. Companies are leveraging AI in software and web development to enhance user experiences and create dynamic, interactive digital applications. AI-driven VR experiences are pushing creative boundaries by offering immersive storytelling environments that captivate and engage audiences. Furthermore, AI-powered analytics are transforming digital advertising, allowing businesses to target specific demographics, tailor content, and optimize campaigns across various platforms.

While the current and potential economic contribution of this cluster is significant, creative digital services in the Philippines, particularly within the IT-BPM sector, are largely outsourced companies. Many companies prioritize client servicing over creating original IP, potentially missing out on opportunities to develop and monetize proprietary

6 U.S. Department of Commerce, *Philippines – Country Commercial Guide | Information and Communications Technology*, January 23, 2024.

innovations that could enhance their competitive edge and contribute more significantly to the economy.

The Plan commits to actively promote this cluster through enhanced digital transformation, AI development, and original IP creation, including copyrights, patents, and trademarks. Furthermore, the National AI Strategy Roadmap, launched in 2021, aims to establish the country as a regional leader in AI research and development. It addresses barriers to AI adoption at the firm level, such as knowledge gaps, resource limitations, and regulatory challenges. These efforts not only aim to diversify the IT-BPM industry but also to enhance its resilience against automation.

Cluster 3
Creative Goods

In creative goods, fashion and furniture are two promising sectors where the Philippines can scale on the international stage. Globally, these sectors dominate the bulk of the value being generated in creative goods.

The global fashion retailing market was valued at USD 4.7 trillion in 2021 and is projected to reach USD 16.4 trillion by 2031, representing a CAGR of 13%.[7] Meanwhile, the global furniture market was valued at USD 517 billion in 2022 and is projected to further grow from more than USD 540 billion in 2023 to more than USD 780 billion by 2030.[8]

Growth in these sectors will have cascading effect on allied industries. In fashion design, indigenous materials such as natural fibers, traditional textiles, and handcrafted embellishments often form the foundation of garments and footwear, adding unique textures, patterns, and cultural significance to collections.

Similarly, in furniture design, indigenous materials offer sustainable and culturally rich resources for crafting unique pieces that embody traditional craftsmanship and heritage.

Featuring the work of renowned Filipino designer Kenneth Cobonpue, the **Spin Easy Chair** earned the prestigious **Golden Pin Design Award in 2024**. Known for blending traditional craftsmanship with modern innovation, Cobonpue continues to elevate Filipino design on the world stage.

This recognition follows his **2022 Gawad sa Sining award** from the Cultural Center of the Philippines. Also in 2024, he was appointed by **President Marcos** as a private sector representative of the **Philippine Creative Industries Development Council**, where he represented the design sector under the Department of Trade and Industry.

With this latest accolade, Cobonpue reaffirms his role in shaping the future of Filipino design and creativity.





7 Business Research Insights, *Fashion Retailing Market Size, Share, Growth, and Industry Analysis Regional Forecast By 2033.*

8 Fortune Research Insights, Furniture Market Size, Industry Share & COVID-19 Impact Analysis, By Raw Material (Wood, Metal, Plastic, and Others), Category (Indoor and Outdoor), End-User (Residential, Office, Hotel, and Others), and Regional Forecast, 2025-2032



Manila FAME 2024 embraces the theme 'REIMAGINATION,' spotlighting the innovative craftsmanship of Filipino artisans and local enterprises. Captured during the event on October 16-18, 2024, the exhibit transforms the country's abundant raw materials into stunning, functional, and aesthetic creations.

Brakong, a lightweight external breast prosthesis for mastectomy patients, won the 2021 Circular Design Challenge conducted by the Design Center of the Philippines, Circulo, and Work in Progress. It also claimed the Philippine leg of the 2022 James Dyson Award and 2023 James Dyson Awards for Sustainability.

Materials such as wood, bamboo, rattan, and leather are commonly used to create furniture that reflects the natural environment and local artisanal techniques. Additionally, textiles play a crucial role in furniture design, providing upholstery fabrics, cushions, and decorative elements that contribute to the overall comfort, aesthetics, and tactile experience of the pieces. Accessories and jewelry further enhance fashion ensembles.

Design innovation can tap into the wealth of sustainable and indigenous materials of the Philippines. By leveraging materials science, both furniture and fashion designs can incorporate indigenous materials in ways that make the cultural stories behind them more accessible and appealing to mainstream markets.

The Plan's approach will foster collaboration among fashion designers, furniture makers, material suppliers, and technology innovators to accelerate innovation and market access. By integrating sustainable practices and digital technologies into design and manufacturing processes, and supporting skill development initiatives, the Philippines aims to enhance the global competitiveness of its fashion and furniture sectors while promoting economic growth and sustainability.



In line with Baguio City's official designation as a UNESCO Creative City of Crafts and Folk Arts, the annual Ibagiw Festival, launched in 2018, aims to inspire and foster innovation in crafts and folk arts.

Through a diverse lineup of art exhibits, cultural performances, trade fairs, forums, and webinars, the festival provides both residents and visitors with an opportunity to explore and celebrate the city's rich cultural heritage.

Cluster 4

Creative Industries in Tourism

Creative industries play a vital role in enriching and diversifying the tourism experience. Beyond their presence in artistic initiatives and visits to creative destinations, they are embedded in a wide range of tourism products such as Creative Tourism, Cultural Tourism, Food and Gastronomy Tourism, Arts Tourism, and Film Tourism. Each of these highlights the talent of Filipino creatives and offers rich, immersive experiences.

Tourism remains a key driver of the Philippine economy. In 2024, it contributed 8.9% to GDP, generated P712 billion in receipts, welcomed over 5.95 million international visitors, and provided jobs for 6.75 million Filipinos. Beyond these numbers, tourism, through its various creative products, provides a powerful platform to showcase and grow the country's creative industries.[9]

Cultural tourism, as defined by UN Tourism, centers on exploring a destination's heritage, crafts, performances, and festivals, all brought to life by local artists. Creative tourism, which emphasizes hands-on engagement and co-creation with communities, is also gaining momentum globally.

9 PSA, "Tourism Contributes 8.9 Percent to the Philippine Economy in 2024."
10 Phoang, Hoang, "Malaysia Most Visited Country in Southeast Asia this Year."







From Left to Right: Apo Whang-Od, the legendary Filipina artist from the Kalinga province; the Sinulog Festival in Cebu; and Molo Soup from Iloilo City.

Food and gastronomy tourism, identified as a priority in the 2023–2028 National Tourism Development Plan, spotlights the country's culinary heritage through cooking classes, food tours, and regional specialties, consistently favored by international visitors.

Film tourism is another high-potential area, with travelers drawn to locations featured in movies and shows. Through the work of Filipino filmmakers and production teams, local destinations gain global visibility, while film tourism enhances related sectors like crafts, cuisine, and music.

Meanwhile, creative cities serve as vibrant intersections of tourism and the arts, offering festivals, performances, workshops, and cultural spaces that foster innovation and community participation. These cities not only attract visitors but also nurture local talent and sustain creative livelihoods.

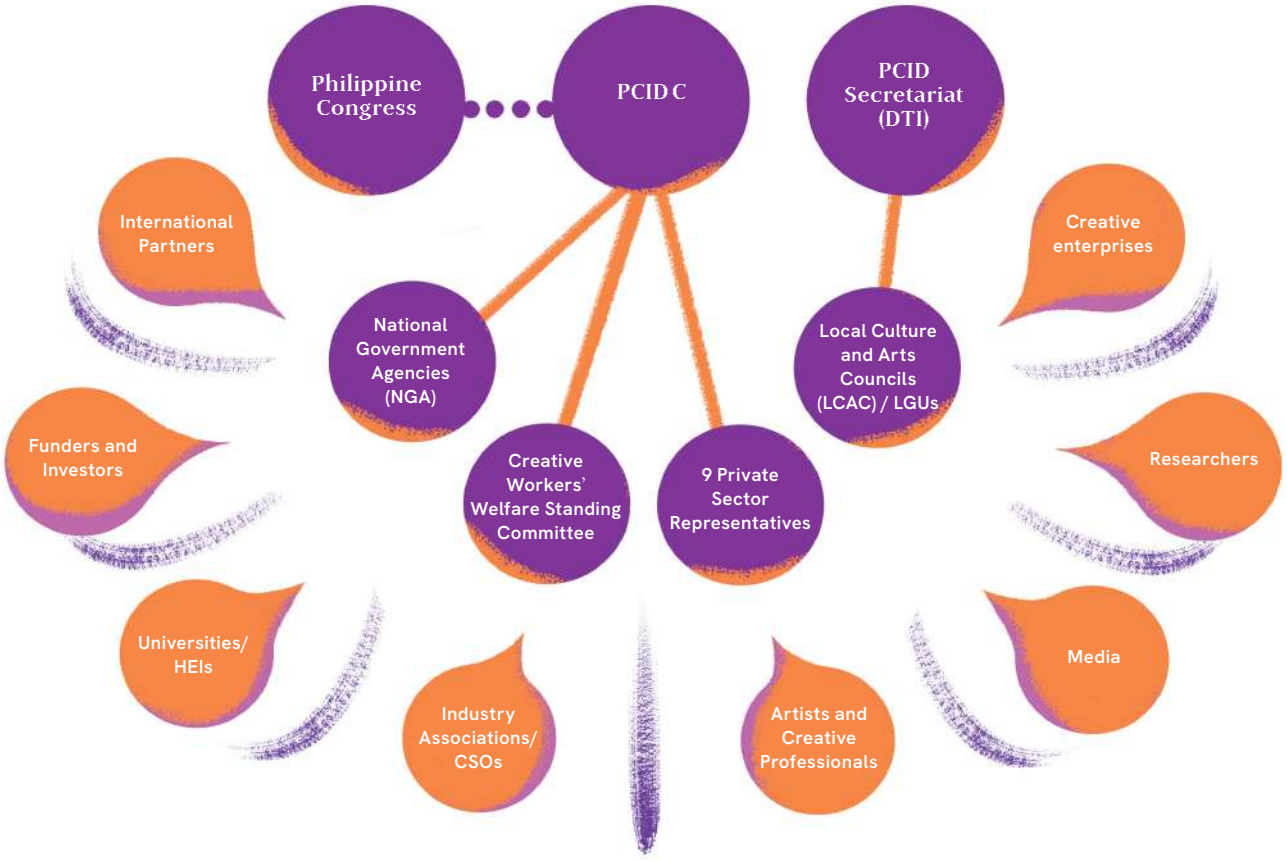
By more fully integrating the creative industries into tourism, the Philippines can position itself as a global destination not just for natural wonders, but for cultural richness, imagination, and artistic expression, where every journey is an encounter with Filipino creativity.

Governance framework

The Plan's governance framework is led by the PCIDC. It ensures effective implementation, coordination, and monitoring of the initiatives, with a strong emphasis on collaboration among key government agencies, the private sector, and other stakeholders. This section outlines the key stakeholders and their roles.

Figure 25

PCIDC Stakeholder Map



PHILIPPINE CREATIVE INDUSTRIES DEVELOPMENT COUNCIL (PCIDC)

Structure and Management:

- **Chairperson:** The DTI Secretary serves as the Chairperson, providing overall leadership and strategic direction for the Council.
- **Private Sector Representatives:** Representatives from each of the nine creative domains, appointed to bring industry-specific insights and expertise.
- **PCIDC:** Representatives from relevant government agencies, to ensure alignment with national policies and programs.

Mandate, Powers, and Functions:

- **Planning and Policy Formulation:** Develop and approve strategic plans and policies to support the growth and sustainability of the creative industries.
- **Private Sector Participation:** Encourage and facilitate active involvement of private sector stakeholders in implementing the Plan.
- **Marketing and Promotion:** Promote Philippine creative industries both locally and internationally to enhance market reach and visibility.
- **Capacity-Building:** Support IP rights, conserve indigenous cultural properties, coordinate with National Commission on Indigenous Peoples (NCIP), and provide training in business, finance, ethics, digital skills, and entrepreneurship with private sector partnerships.
- **Other Functions:** Generate and mobilize resources, enter into contracts, manage properties, raise funds, use a corporate seal, delegate powers, create ad hoc committees, and promulgate rules and regulations to support the objectives of the PCIDA.

COUNCIL SECRETARIAT

The Council Secretariat serves as the operational and administrative arm of the PCIDC, ensuring the smooth execution of the Council's initiatives.

Roles and Responsibilities:

- **Administrative Support:** Provide logistical and administrative support to the PCIDC, including organizing meetings, preparing agendas, and maintaining records.
- **Implementation Oversight:** Monitor the implementation of Council-approved policies and initiatives, ensuring projects are executed effectively and within budget.
- **Coordination:** Act as the central point of coordination among Council members, government agencies, private sector stakeholders, and other relevant entities.
- **Communication:** Facilitate communication between the PCIDC and external stakeholders, ensuring transparency and timely dissemination of information.
- **Monitoring, Evaluation, and Reporting:** Track the progress of initiatives and prepare regular reports on the status and impact of projects for the Council's review.
- **Resource Management:** Manage the allocation and disbursement of funds, ensuring efficient use of resources for their intended purposes.

LOCAL CULTURE AND ARTS COUNCILS (LCACS)

Structure and Management:

- **Chairperson:** Appointed by LGUs, responsible for leading the LCAC and ensuring alignment with the Plan.
- **Members:** Local artists, cultural practitioners, business leaders, and representatives from educational institutions.

Roles and Responsibilities:

- **Local Implementation**: Execute and monitor initiatives at the grassroots level, ensuring alignment with the overall objectives of the Plan.
- **Cultural Promotion:** Promote local cultural activities and support local artists and cultural practitioners.
- **Community Engagement:** Engage with local communities to encourage participation and support for creative industry initiatives.
- **Feedback Mechanism:** Provide feedback to the PCIDC on local challenges and opportunities, helping inform policy adjustments and strategic planning.

Table 6

Key Government Agencies Involved in the Implementation of the PCIDA and their Roles

	GOVERNMENT AGENCY	ROLE
	PCIDC	
1	**Department of Trade and Industry (DTI)**	Leads the overall coordination and implementation of the Act and the Plan.
2	**National Commission for Culture and the Arts (NCCA)**	Ensures alignment with cultural conservation and promotion.
3	**Department of Education (DepEd)**	Supports educational initiatives and integrates creative industry training into the curriculum.
4	**Commission on Higher Education (CHED)**	Partners with higher education institutions for advanced training and research in creative industries.
5	**Department of Science and Technology (DOST)**	Provides technological support and innovation initiatives.
6	**Department of Information and Communications Technology (DICT)**	Facilitates digital infrastructure and online platform development.
7	**Department of Economy, Planning, and Development (DEPDev)**	Aligns the creative industries' development with national economic plans.

	GOVERNMENT AGENCY	ROLE
8	**Department of Tourism (DOT)**	Promotes cultural and creative industries in tourism.
9	**Intellectual Property Office of the Philippines (IPOPHL)**	Protects and promotes intellectual property rights.
10	**Department of the Interior and Local Government (DILG)**	Coordinates with local government units to implement creative industry programs at the local level.
Other National Government Agencies (NGA)		
11	**Film Development Council of the Philippines**	Supports the film and audiovisual sectors.
12	**Design Center of the Philippines**	Promotes design excellence and innovation.
13	**National Book Development Board**	Supports the publishing industry.
14	**Cultural Center of the Philippines**	Facilitates performing arts and cultural events.
15	**Department of Labor and Employment (DOLE)**	Ensures fair labor practices and support for workers in the creative sectors.
16	**Technical Education and Skills Development Authority (TESDA)**	Provides vocational training and skills development.
17	**Other relevant government agencies and entities**	To be determined as needed, for agencies with roles relevant to supporting and developing the creative industries, under consideration and approval of the Council.

Risk Management Plan

The Risk Management Plan ensures that potential risks are identified, assessed, and mitigated to minimize their impact on the Plan's implementation and governance.

Risk 1

Policy Coordination

Coordination between various government agencies and private sector entities may require enhancement to avoid fragmented efforts.

1.1. **Probability: Medium / Impact: Medium**
1.2. **Mitigation Strategies:**

1.2.1. Use an information and issue management system to streamline communication and coordination.
1.2.2. Regularly monitor and evaluate policy implementation.

Risk 2

Diverse Interests

Diverse interests and levels of engagement among stakeholders, particularly within the creative community, may require careful management to ensure consistent progress.

2.1. **Probability: Medium / Impact: Medium**
2.2. **Mitigation Strategies:**

2.2.1. Establish a clear communication and engagement plan.
2.2.2. Create forums for regular stakeholder dialogue and feedback.

RISK POTENTIAL:

- **Low risk potential** refers to a low likelihood of an issue occurring.
- **Medium risk potential** indicates a moderate chance of an issue arising.
- **High risk potential** suggests a high probability that an issue will happen.

RISK IMPACT:

- **Low risk impact** involves minor consequences with negligible effects on objectives.
- **Medium risk impact** entails moderate consequences that could cause some disruption.
- **High risk impact** means significant consequences that can severely affect objectives and operations.

2.2.3. Ensure transparent decision-making processes.
2.2.4. Do pilot or beta tests, especially for wider-scale programs.
2.2.5. Design programs to benefit as many stakeholders as possible.

Risk 3

Leadership Change

Changes in government leadership or policy direction may influence the continuity and support for the creative industries' plan.

3.1. **Probability: High / Impact: Medium**
3.2. **Mitigation Strategies:**

3.2.1. Build strong multi-sectoral support for the Plan.
3.2.2. Institutionalize policies through legislation or documentation to ensure continuity.
3.2.3. Engage a broad spectrum of political stakeholders to secure ongoing commitment.
3.2.4. Maintain a knowledge management system.

Risk 4

Adequacy and Timeliness of Funds

Timely disbursement of funds or grants is crucial to maintaining project success and impact.

4.1. **Probability: High / Impact: High**
4.2. **Mitigation Strategies:**

4.2.1. Develop and communicate a detailed fund disbursement timeline to all stakeholders, ensuring transparency and setting clear expectations.

4.2.2. Allocate a contingency fund within the project budget to cover any short-term financial gaps caused by delayed disbursements.

4.2.3. Simplify and expedite approval processes by reducing bureaucratic red tape and utilizing digital systems to ensure timely fund disbursement.

Risk 5

Balancing Priorities / Complex Program Objectives

Balancing economic, cultural, and social objectives requires careful consideration to achieve holistic development.

5.1. **Probability: High / Impact: Medium**

5.2. **Mitigation Strategies:**

5.2.1. Engage experts from various fields to provide balanced perspectives.

5.2.2. Regularly review and adjust priorities based on progress and feedback.

Risk 6

Cultural Sensitivity and Inclusivity

Respecting and incorporating cultural diversity and inclusivity is vital for maintaining community support.

6.1. **Probability: Low / Impact: High**

6.2. **Mitigation Strategies:**

6.2.1. Ensure representation and participation of diverse cultural groups in decision-making.

6.2.2. Develop guidelines and best practices for cultural sensitivity.

6.2.3. Promote projects that highlight and celebrate cultural diversity.

Risk 7

Data Privacy

Protecting personal data is essential to prevent breaches and maintain trust.

7.1. **Probability: Medium / Impact: Medium**

7.2. **Mitigation Strategies:**

7.2.1. Utilize advanced encryption techniques to protect personal data both in transit and at rest.

7.2.2. Perform routine security assessments and audits to identify vulnerabilities and ensure compliance with data protection regulations.

7.2.3. Educate stakeholders and employees on data privacy and security best practices to reduce the risk of human error.

Risk 8

Intellectual Property Infringement

Clarifying content ownership and protecting IP rights are important to prevent unauthorized use and disputes.

8.1. **Probability: Low / Impact: Medium**

8.2. **Mitigation Strategies:**

8.2.1. Establish comprehensive policies and procedures for IP management in contracts to ensure all creative outputs are protected.

8.2.2. Regularly audit and monitor IP use to detect and address any unauthorized use or infringement promptly.

8.2.3. Provide training and resources to stakeholders on IP rights and protection to enhance awareness and compliance.

Risk 9

Awareness on PCIDC Mandate

A clear understanding of the PCIDC's roles in relation to other government agencies is necessary to prevent missed opportunities and inefficiencies.

9.1. **Probability: High / Impact: Low**

9.2. **Mitigation Strategies:**

9.2.1. Clearly define and communicate the distinct roles and priorities of PCIDC in relation to other government agencies.

9.2.2. Organize regular inter-agency meetings and coordination committees to ensure alignment and collaboration.

9.2.3. Create a clear brand and distribute comprehensive guidelines and campaigns to communicate specific functions and areas of responsibility.

The Philippines, envisioned as Asia's Premier Creative Hub, will thrive as a dynamic ecosystem where culture, entrepreneurship, creativity, and technology intersect—championing artists, fostering talent, and protecting workers' rights.

Our Plan is a blueprint for achieving this vision. It highlights our country's unique cultural landscape, explores the creative economy's profound socio-economic impact across key domains, and positions the Philippines within the dynamic global creative landscape.

Grounded in an in-depth analysis of **global trends and challenges,** our Plan is built upon the **BEAMS framework—Build Creative Ecosystems, Empower Creative Workforce, Accelerate Inclusive Innovation, Mobilize Financing Support, and Seize Market Opportunities.** With this strong foundation, the Plan outlines **a clear and actionable strategy** to drive sustainable growth, nurture creative talent, and unlock new opportunities for the Philippine creative industries.

Our Plan has been shaped by years of research, collaboration, and deep engagement with stakeholders. Guided by industry studies and roadmaps commissioned by the DTI, we have ensured that our strategy reflects the aspirations of Filipino creatives while staying attuned to global shifts. It is a strategy that invests in digital infrastructure, boosts local enterprises on the world stage, and empowers a creative workforce ready to drive innovation. Through these efforts, we will elevate the Philippines as a global leader in creative industries, fostering inclusive growth, resilience, and sustainability.

Our Plan is a living document—constantly evolving alongside the creative industries it seeks to uplift. It continuously adapts to new insights, emerging opportunities, and shifting realities. More than just a roadmap, it is a testament to the passion of Filipino creatives and the unwavering belief that creativity and innovation have the power to transform our economy and society.

Our Plan is a call to collective action, one we all contribute to. Each stakeholder— government agencies, industry leaders, creative communities, and content consumers—has an essential role to play. Together, we support our artists, create opportunities for the next generation, and build a transformative force that uplifts lives in the Philippines and worldwide.

Our Plan is the story of our creative journey. The next chapter begins with unwavering passion and collective effort to elevate the Philippine creative industries. We will make Filipino ideas, stories, and innovations shine on the global stage, proudly carrying the brand of Malikhaing Pinoy.

Let us write this story together.

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