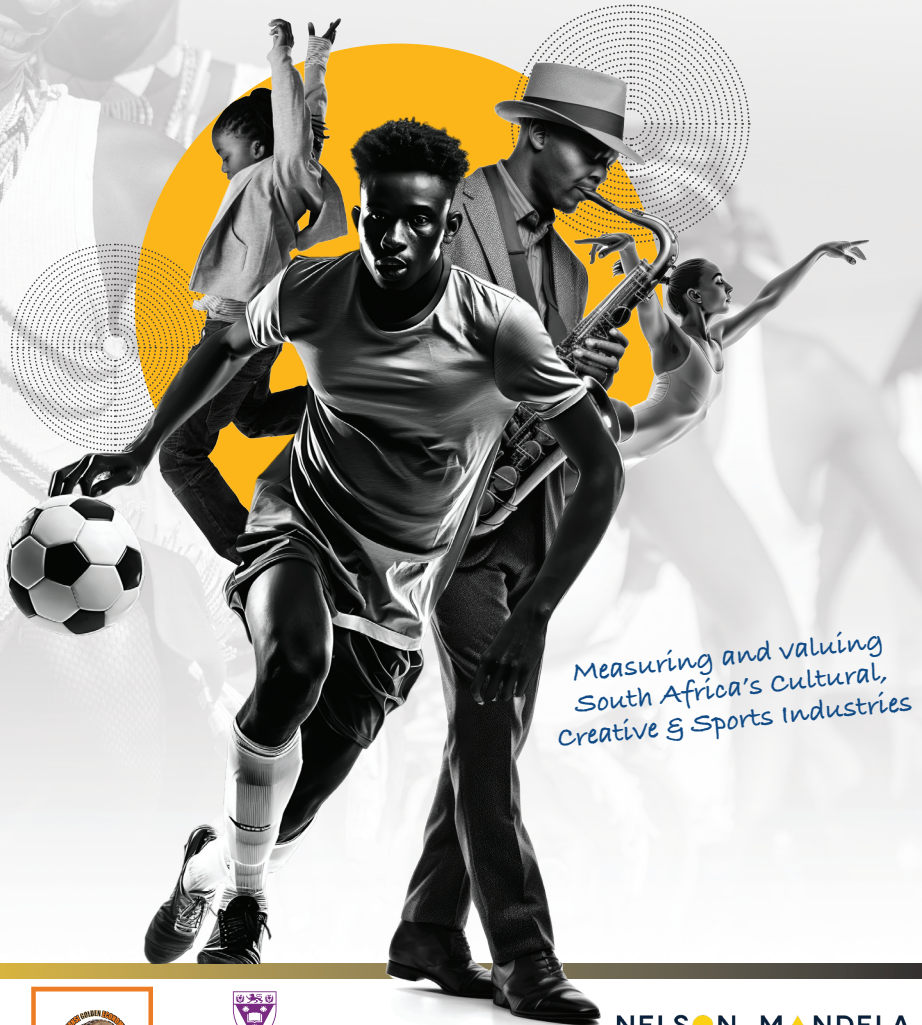


THE ECONOMIC MAPPING OF THE CULTURAL, CREATIVE AND SPORTS INDUSTRIES

CAPSTONE REPORT 2025



*Measuring and valuing
South Africa's Cultural,
Creative & Sports Industries*

The Economic Mapping of the Cultural, Creative & Sports Industries in South Africa 2025

CAPSTONE REPORT



Department of Sport, Arts and Culture



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LIST OF ABBREVIATIONS

AFS	Annual Financial Statistics
BRICS	Brazil, Russia, India, China, and South Africa
CCI	Cultural and Creative Industries
CCI&S	Cultural, Creative Industries and Sports
CGE	General Equilibrium Model
DSAC	Department of Sport, Arts, and Culture
dti	Department of Trade and Industry
EU	European Union
EU28	28 countries of the EU
FCS	Framework for Cultural Statistics
GDP	Gross Domestic Product
GHS	General Household Survey
GOS	Gross Operating Surplus
GVA	Gross Value Added
HS	Harmonised Commodity Description and Coding System
IP	Intellectual Property
I-O	Input-Output
KMA	Keynesian Multiplier Analysis
LMD	Labour Market Dynamics
MEIA	Macro-Economic Impact Assessment
QLFS	Quarterly Labour Force Survey
SACO	South African Cultural Observatory
SADC	Southern African Development Community
SAM	Social Accounting Matrix
SARB	South African Reserve Bank
SDG	Sustainable Development Goals
SIC	Standard Industrial Classification
SITC4	Standard International Trade Classification
SNA	Systems of National Accounts
StatsSA	Statistics South Africa
SU-Tables	Supply and Use Tables
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USMCA	US-Mexico-Canada
VR	Virtual Reality

MEASURING AND VALUING SOUTH AFRICA'S CULTURAL, CREATIVE & SPORTS INDUSTRIES

WHY MEASURING THE CCI&S MATTERS

CCI&S represent a dynamic intersection of cultural capital, creative production, and socio-economic development. Mapping these industries provides the empirical foundation needed to understand their economic footprint, labour dynamics, and growth potential, thereby informing evidence-based strategies that advance national development outcomes and social inclusion.

KEY FINDINGS AND ECONOMIC CONTRIBUTION

GDP (2023)

R271 billion
(4% of SA GDP)

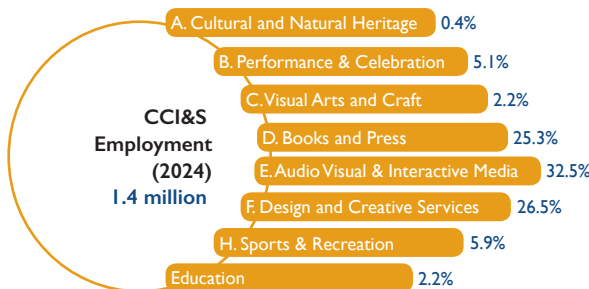
INTERNATIONAL TRADE (2024)

US\$ 304 million

GOVERNMENT REVENUE (2023)

R117 billion

GDP AND EMPLOYMENT CONTRIBUTION BY DOMAIN



EMPLOYMENT (2024)

Created 1.4 million jobs

POVERTY REDUCTION (2023)

Total income received by households was about **R244 billion**, with an estimated **R45 billion** going to lower income households.



THEME:

DIGITAL FUTURES AND SUSTAINABLE TRANSITIONS

HOW TECHNOLOGY & SUSTAINABILITY ARE RESHAPING THE CCI&S

Generative AI is transforming the CCI&S by lowering production costs and accelerating creative output.

Streaming platforms, social media and online marketplaces are globalising South African content and expanding audiences and revenue streams.

Digital inequality persists, with urban-based creatives accessing better connectivity, tools, and training, while rural creatives face high data costs and limited infrastructure.

Non-Fungible Tokens (NFTs), virtual goods, automated streaming, and digital advertising create new income opportunities, though earnings remain concentrated among a small minority.

AI supports eco-design, material optimisation, and virtual participation in cultural and sports events. It also requires energy-intensive infrastructure that must be decarbonised.

The sector is responding to climate risks through green sets, eco-friendly events, renewable energy use, circular design, and reduced carbon footprints in productions.

Digital infrastructure (e.g. data centres) and streaming platforms have high energy use and e-waste footprints, highlighting the need for greener digital infrastructure in a coal-heavy economy.

Artists, designers, and athletes play a crucial role in shaping public awareness of climate change through digital campaigns, performances, and immersive technologies.

POLICY IMPLICATIONS

- Prioritise inclusive participation that supports youth, women, and rural creatives through targeted funding and digital/ entrepreneurship skills programs that broaden ownership, reduce inequalities, and build a future-ready creative workforce.
- Develop a national framework to guide ethical AI use, protect digital IP, bridge digital divides, and incentivise green creative practices and support eco-friendly production, digital workflows, recycling/upcycling initiatives, and climate-smart sports and cultural events.
- Diversification of export markets and strengthening of value-added cultural trade, while building strategic partnerships with SADC, USMCA, and emerging Middle Eastern markets to reduce volatility and expand cultural export footprints.
- Policies must strengthen metro-led creative hubs while enabling smaller provinces to leverage creative industries for redistribution through infrastructure investment, creative precincts, and targeted place-based development.

01

INTRODUCTION



In today's increasingly globalised world, Cultural, Creative Industries and Sports (CCI&S) are emerging as crucial sectors of national economies that significantly contribute to leisure and entertainment and stand as pillars of innovation, competitiveness, employment and development. The global share of the creative economy was estimated to be around \$2.3 trillion in 2024, contributing 3.1% to GDP and employing 6.2% individuals. The creative industries are known to create more employment for women and youths than any other sector, which is a great potential for Africa, given that the continent has over 60% of its population under 25 years old. The CCI&S could therefore constitute a new avenue for the million job seekers who enter the job market monthly on this continent.

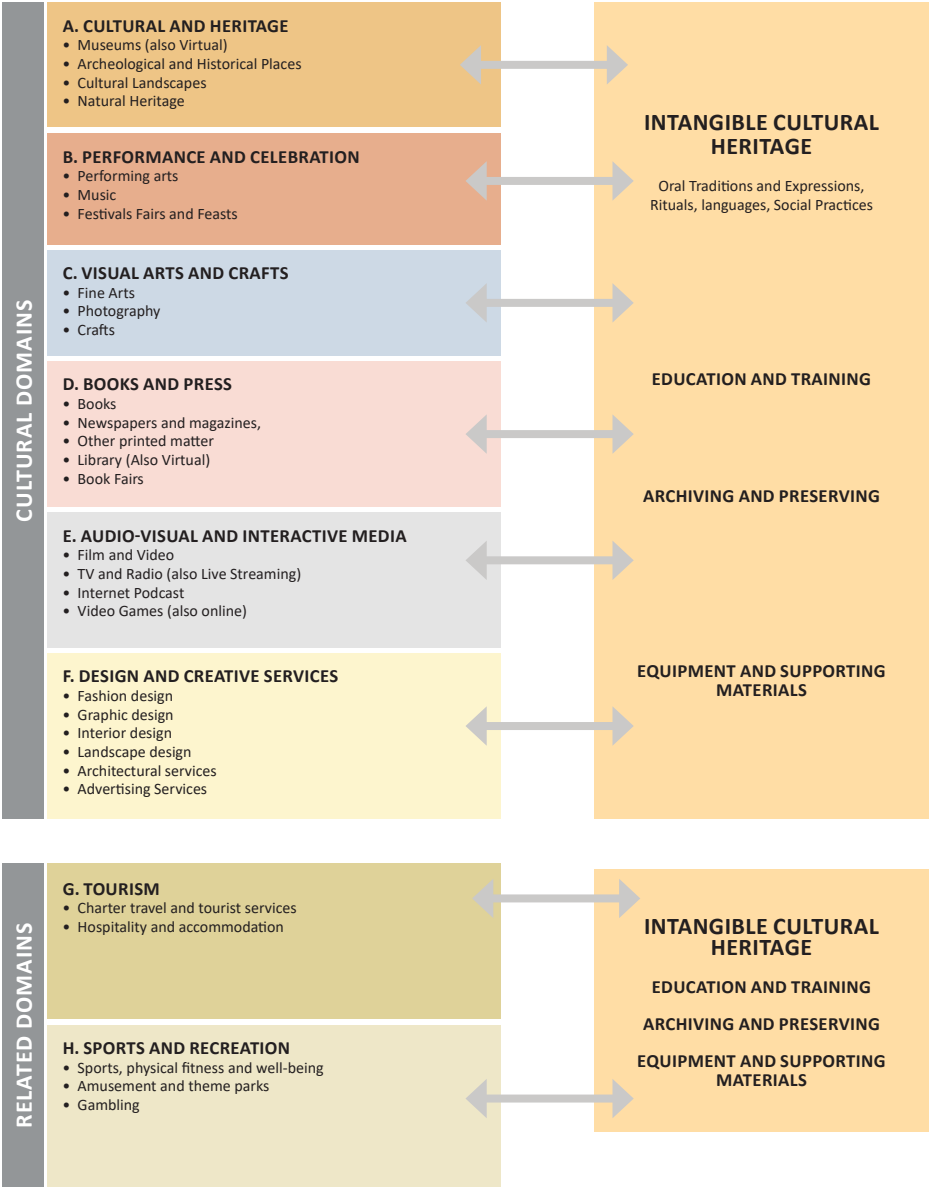
In South Africa, the economic and social footprint of these industries is already noticeable. For instance, in 2020, South Africa's cultural and creative industries contributed 3% to Gross Value Added (GVA) and accounted for 4.1% employment in 2019. As the global economy continues to recover following the easing of pandemic-related restrictions, these sectors are projected to rebound, benefiting from renewed tourism, increased cultural exchange, and domestic consumption, with employment trends further underscoring the sector's importance. The cultural and creative industry generated just under a million jobs in 2022 in an array of occupations, including film makers, designers and actors (SACO, 2022). The sports also make an important contribution in South Africa's GDP. The industry is estimated to add about R50 billion annually to GDP (DSAC, 2022). Jobs are created in the sports industries themselves and in related industries, stimulated by tourism. Trade statistics reflect a similar potential of the CCI&S in South Africa, with exports of cultural goods rising from 0.25% of cultural exports to 0.47% in 2018 (SACO, 2022).

Given the importance of the cultural, creative and sports industries to the South African economy, it is of interest to the government to leverage its potential both for economic growth and environmental sustainability. In this line, digital technologies are increasingly becoming a defining force in reshaping cultural expression, creative industries, and sports around the world. The digital age can make it relatively easier for African culture, with digital tools now structuring how stories are communicated, music is shared, how games are played, and how art is monetised. There is also a pressing need to combat climate change as temperatures increase, altered rainfall patterns, and extreme weather events pose a danger to public health, food production, biodiversity, and water security (DEA, 2019). The CCI&S can drive the economy to environmental sustainability through platforms that shape public opinion, promote eco-conscious behaviours, and lead by example through sustainable practices within their productive practices.

1.1 Defining the Cultural, Creative, and Sports Industries

The creative economy is an evolving concept which currently lacks a universal definition. The terms 'creative economy' and 'creative industry' do not mean the same thing in different countries and governments. The creative industries encompass specific industries of a creative nature, while the creative economy sums up all output derived by creatives, which is sometimes difficult to quantify. The industries are deeply rooted in human capital; hence, they have huge job creation potential. The output stems from individual creativity, imagination, inspiration, skills, and talent, which in turn translates to wealth. UNESCO (2023) defines the Cultural and Creative Industry (CCI) as "the creation, production, and commercialisation of products which are intangible and cultural in nature" and which are "...protected by copyright and they can take the form of a good or a service". The following figure shows the different domains under the industry.

Figure 1: Framework for Cultural Statistics – UNESCO Institute for Statistics (FCS/ISU)



Source: UNESCO (2009)

Similarly, according to the United Nations Conference on Trade and Development (UNCTAD), the cultural and creative industry mainly includes advertising, architecture, arts and crafts, design, fashion, film, video, photography, music, performing arts, publishing, research and development, software, computer games, electronic publishing, and TV/radio. In South Africa, the cultural industries include music (classical, popular, folklore); the visual arts (painting, sculpture, public arts, and the decorative arts); the publishing sector based on writing and literature (books, magazines, newspapers); the audio-visual and media sector (film, television, photography, video, broadcasting); the performing arts (theatre, dance, opera, live music); the emerging multimedia sector (combining sound, text, and image); crafts (traditional art, designer goods, craft art, functional wares, and souvenirs); cultural tourism; and the cultural heritage sector (museums, heritage sites and cultural events such as festivals and commemorations) (CSA, 1998).

While UNESCO does not currently provide a formal definition of the sports industry comparable to the Framework for Cultural Statistics (FCS) used for the Cultural and Creative Industries, the UNESCO Institute for Statistics (UIS) offers relevant guidance through its classification of Sports and Physical Recreation. The UIS includes within this domain: the provision and organisation of sports and recreation services, coaching and education, and the manufacture, wholesale, and retail of sports-related goods and equipment.

Building on this guidance and complementary definitions from international literature (IGI Global, Human Kinetics, and sport economics sources), this study defines the sports industry as the system of enterprises, institutions, and activities engaged in the production, organisation, facilitation, promotion, and distribution of goods, services, and experiences related to sport and physical recreation.

It encompasses:

- The core sport economy, including professional and amateur sport, events, and athlete development;
- Support and ancillary services, such as coaching, sports tourism, broadcasting, media, sports technology, and facility management; and
- The manufacture, trade, and retail of sports equipment, apparel, and other related goods.

This definition recognises sport as both an economic and cultural activity — generating employment, income, and innovation — and as a social institution that contributes to cohesion, identity, and wellbeing. The inclusion of both tangible goods and intangible experiences aligns the sports domain conceptually and methodologically with the broader CCI&S framework used in this study.

The South African government has also established the CCI&S industries' importance in creating economic and social benefits. This is evident in several official strategy documents that were previously produced to develop the sector.¹ The Cultural and Creative Industries Master Plan released in 2022, is the most recent offering that aims to set up specific interventions to assist in creating decent work for the citizens of the country in the CCI. Similarly, strategy and policy documents have been developed for the Sports Industry,² with a core focus of promoting mass participation, unifying the nation, as well as professionalising sport. However, it is important to

¹ Cultural Industries Growth Strategy (CIGS, 1998), Accelerated and Shared Growth Initiative for South Africa (ASGISA), National Industrial Policy Framework (NIPF), New Growth Path (NGP) and the National Development Plan (NDP).

² White Paper on Sport and Recreation (1998), National Sport and Recreation Plan (2012), Sports Industry Masterplan (emerging, 2022–2024)

regularly determine the picture and the impact of the creative and sports industries on the South African economy. It is for that reason, SACO commissioned the mapping of the CCI&S, which started in 2018.³ The aim is to map the impact of CCI&S on the South African economy. The sports industry is a new addition to the report; it was not included in the previous mapping studies.

The previous mapping study focused on the impact that the COVID-19 pandemic has had on the CCIs, both internationally and in South Africa. The current mapping study still maintains the post-COVID performance of the CCI&S but with a specific focus on developing trends in the industry, in particular, the impact of AI and technology, as well as sustainability in the industry.

This study provides the most comprehensive account to date of the CCI&S by integrating both cultural and sports domains into a single analytical framework. Using a Satellite Account embedded in a Social Accounting Matrix (SAM), the report quantifies the sector's contribution to GDP, employment, household income, trade, and fiscal revenue, while also examining its spatial distribution across provinces and metropolitan areas. The Capstone report summarises the technical methods, data and findings of the chapters that make up the mapping study. The contents of the chapters are as follows and available on SACO website:

- Chapter 1: The Macroeconomic Impact of the CCI&S in South Africa
- Chapter 2: Cultural Employment and Transformation
- Chapter 3: International Trade in Cultural Goods and Services
- Chapter 4: Spatial Distribution – Provincial and Metro Profiles
- Chapter 5: The South African Creative and Sports Economy in Historical Context

³ The initial mapping study only focused on the Cultural and Creative Industry. This is the first mapping study to incorporate Sports.

02

THE IMPACT OF DIGITISATION AND SUSTAINABILITY ON THE CULTURAL, CREATIVE, AND SPORTS INDUSTRIES



The CCI&S are undergoing a profound transformation, shaped by two global megatrends: the acceleration of artificial intelligence (AI) and digital technologies, and the imperative of environmental sustainability. Scholars have increasingly emphasised that cultural and creative sectors are not merely symbolic domains of identity and heritage but are also deeply embedded in broader technological, economic, and ecological transitions (UNESCO, 2009; Cunningham & Potts, 2015). The twin dynamics of digitisation and sustainability are particularly salient in South Africa, where the creative economy must negotiate structural challenges such as inequality, infrastructure gaps, and environmental vulnerability, while simultaneously seeking opportunities in global markets.

At the heart of this transformation lies a spatial dimension. Metropolitan hubs such as Johannesburg, Cape Town, and Tshwane are leading the adoption of AI-enabled creative practices and sustainable production models. At the same time, smaller provinces and secondary cities remain constrained by limited connectivity, resource endowments, and institutional capacity. Recognising these geographic disparities is critical to ensuring the sector's growth trajectory is both competitive and inclusive.

2.1 Digitisation, AI, and Technology

The digitalisation of the CCI&S has reconfigured how cultural goods and services are produced, distributed, and consumed. Streaming platforms, social media, and AI-enabled tools have globalised South African creative products, enabling genres like Amapiano to reach international audiences. This reflects what Flew (2012) described as the “platformisation” of culture, where creative value is increasingly mediated through digital intermediaries.

Artificial intelligence has emerged as a particularly disruptive force. Surveys suggest that a majority of South African artists now integrate generative AI into music composition, video editing, and visual design. These tools accelerate production, lower costs, and open new creative possibilities, but they also raise questions about intellectual property, authorship, and employment substitution. In the design domain, AI is being deployed in fashion modelling, product visualisation, and creating digital-only garments for online consumption, echoing global experiments in the metaverse economy. Similarly, in sports, AI-assisted performance analytics and automated streaming platforms, such as SuperSport Schools' live-streaming of youth sports, are reshaping the business model of participation and viewership.

The economic implications are significant. Digital distribution has created new revenue streams through streaming royalties, NFTs, online advertising, and esports sponsorships. Yet the benefits remain unevenly distributed. Research in South Africa⁵ confirms that only a small fraction of musicians earn sustainable incomes from streaming platforms, with the majority struggling to monetise their digital presence. Moreover, structural inequalities in digital infrastructure perpetuate a spatial divide: metropolitan creatives have greater access to high-speed internet, digital equipment, and innovation ecosystems, while rural practitioners face barriers of high data costs, unreliable connectivity, and limited training opportunities.

⁵ Music in Africa Foundation. (2024). Revenue Streams for Music Creators in South Africa 2024. Retrieved from <https://www.musicinafrica.net/RSFAM>

Case Study I

Digital Transformation IP Challenges and International Lessons

Digital transformation and the rapid advancement in AI have revolutionised creative industries, fostered productivity and created new occupations. However, concerns remain around intellectual property rights, job displacement, and privacy issues.⁶ Developed economies have implemented diverse policy responses in this regard. The United Kingdom government launched a consultation process in December 2024 that attracted 11,500 responses from creative industries, AI companies, and legal experts. The consultation aimed to create transparency, support rights holders, and to ensure AI developers use legally sourced training data.⁷ France's competition authority imposed fines on companies using unlicensed data for AI model training. However, copyright law alone is insufficient; comprehensive policies must also address skills development and fair compensation mechanisms. South Africa can leverage these international frameworks while adapting them to local contexts and institutional capacities.

2.2 Sustainability in the CCI&S

Parallel to the digital turn, sustainability has become an increasingly central concern for the creative and sports economy. As a coal-dependent and climate-vulnerable country, South Africa faces intensifying environmental pressures, including droughts, rising temperatures, and extreme rainfall events. These conditions intersect with the CCI&S in multiple ways: through the carbon footprint of mega-events, the material intensity of the textile and fashion industries, and the waste generated by festivals, concerts, and sports gatherings.

The sector, however, is a source of environmental challenges and a site of innovative responses. Creative practitioners have pioneered practices of recycling and upcycling, with examples ranging from Mbongeni Buthelezi's art made from melted plastics to Sealand Gear's sustainable fashion brand. The film and music industries are experimenting with "green sets," employing LED lighting, digital workflows, and renewable energy sources to reduce emissions. Internationally, sports events such as the Paris 2024 Olympics have embraced eco-design and renewable infrastructure, setting precedents that South African venues could adopt.

Equally significant is the cultural influence of the sector. Artists, designers, and athletes are powerful storytellers, capable of shaping public understanding of climate change and sustainability. Campaigns that integrate performance, visual narratives, and digital amplification have proven effective in embedding environmental awareness in popular consciousness. Virtual and augmented reality technologies are increasingly used to visualise climate impacts, offering immersive experiences that bridge scientific evidence and public engagement.

⁶ Shelper, A., Maijane, K., & Njomane, M. (2024). Artificial intelligence – Rushed revolution or holy algorithmic grail? The initial impact of artificial intelligence on South Africa's creative work and workers. DSAC/South African Cultural Observatory: Gqeberha. Retrieved from <https://www.southafricanculturalobservatory.org.za/artificial-intelligence-cci-report>

⁷ UK Parliament. (2024). Copyright and artificial intelligence [Hansard debate, 18 December 2024]. Retrieved from <https://hansard.parliament.uk/commons/2024-12-18/debates/447E0399-22CE-46AC-809B->

Case Study 2

International Lessons on the CCI&S Industries and Skills Development

A study⁸ examining digitisation in Africa found critical skills gaps across various dimension including digital infrastructure, digital finance, digital skills, and digital public sector engagement. Moreover, about 48% of workers in developing countries with formal education lack the right level of digital skills.

In responding to the digital skills gap, developing countries have implemented various strategies that include industry partners, formal education, using institutional infrastructure. In the European Union (EU), the Creatives Europe Program funded various initiatives aimed at enabling creatives experiment with AI technologies without worrying about the cost.⁹ Moreover, around the world there are various educational programmes that focus on AI and data analytics in the CCI&S.¹⁰ Such initiatives, collaboration and education enable structured learning for creatives, leading to better outcomes.

2.3 Intersections of AI and Sustainability

The convergence of AI and sustainability introduces both opportunities and risks. On the one hand, digitalisation facilitates dematerialisation: virtual showcases, online fashion weeks, and digital music releases reduce the need for physical travel, textiles, and printed media, thereby lowering environmental footprints. AI-driven design tools can optimise material use in fashion and architecture, while digital platforms enable virtual participation in sports and cultural events, reducing energy-intensive logistics.

On the other hand, the infrastructure underpinning digitisation is itself environmentally intensive. Data centres, streaming platforms, and high-bandwidth technologies consume significant energy and contribute to e-waste, unless powered by renewable sources and accompanied by sustainable practices. This paradox underscores the need for integrated strategies that align digital expansion with green transitions. For South Africa, where electricity generation remains dominated by coal, greening digital infrastructure is as urgent as expanding access.

2.4 Challenges and Policy Considerations

The creative sectors, including media, digital storytelling, visual arts and craft, fashion, music, and design, are now increasingly seen as the way forward in promoting environmental sustainability. They need dedicated legislation to facilitate sustainable practice, inclusive digital transformation, and deliver strategic partnerships to release their potential. However, there are emerging structural challenges at the intersection of AI, Sustainability, and the CCI&S. Structural barriers, such as digital inequality, exclude full participation for creatives in rural areas. Protection of Intellectual Property (IP) in digital domains also remains a stumbling block, with piracy and counterfeit causing losses in the creative industries annually. Further, there are sustainability gaps

8 Bhorat, H., Signé, L., Asmal, Z., & Monnakgotla, J. (2023). Digitalization and digital skills gaps in Africa: An empirical profile. Brookings Institution. Retrieved from <https://www.brookings.edu/articles/digitalization-and-digital-skills-gaps-in-africa-an-empirical-profile/>

9 European Commission. (2023). Greening the Creative Europe programme. Publications Office of the European Union. <https://op.europa.eu/en/publication-detail/publication/e20ac9a0-f52b-11ed-a05c-01aa75ed71a1/language-en>

10 University of York. (n.d.). Artificial Intelligence for the Creative Industries (MSc). Retrieved October 6, 2025, from <https://www.york.ac.uk/study/postgraduate-taught/courses/msc-ai-for-the-creative-industries/>

in terms of waste management, energy efficiency and eco-certification. The rapid uptake of AI also requires upskilling and reskilling to match skills to available opportunities. Three main policy areas where intervention is necessary and effective are described below.

2.4.1 Incentives and frameworks for eco-friendly creative production

Enhancing the performance of the creative sector for an ecologically friendly production necessitates the implementation of several key policies spanning a mix of regulatory reforms, tax incentives, and sector-specific guidelines. The application of these regulations builds an environmentally conscious society rooted in knowledge and culture.

- Subsidies should be given to enterprises using ecologically friendly means of production and distribution in the form of green subsidies and tax credits. This can include producers using creative techniques such as using biodegradable materials and renewable energy sources.
- Certification programs and eco-labels can equally be implemented to serve as incentives to those using environmentally friendly techniques. These labels can equally serve as key elements that will permit consumers to identify environmentally friendly products.
- For more eco-friendly production activities, setting up sector-specific environmental standards or “green protocols” tailored for events, architecture, publishing, music festivals, and more is equally vital.

2.4.2 Financing digital access, green infrastructure, and capacity building

Equity, inclusion, and resilience in creative sectors rely greatly on accessible infrastructure as well as a digitally literate and skilled workforce. The near absence of these systems disproportionately impacts Global South creatives and marginalised groups.

Development of the digital infrastructure: The expansion of the digital infrastructure such as investment in high-speed internet in underserved communities such as rural areas can enhance participation and eventual impact in the creative economy. Research has shown that communities with good internet access are often more receptive to scientific knowledge as internet tools permit them to access vital information (World Bank, 2021).

Establishing sustainable creative spaces: Setting up spaces that value eco-conscious behaviour and collaboration such as art hubs with wind energy, and studios that operate on sustainable architecture principles, helps drive environmental consciousness among individuals to drive sustainability.

Valorising capacity building programmes: training programs focused on digital literacy and content creation; eco-conscious design, production, and distribution; entrepreneurship, IP rights, and creative business models can help build knowledge and awareness.

2.4.3 Public-private partnerships to amplify sectoral impact

Public-Private Partnerships (PPPs) have provided a central vehicle to exploit the creative economy’s structural characteristics and move into scale sustainability. With the capacity to mobilize an agglomeration of resources, risk-sharing, and convergence of innovation, PPPs provide a powerful instrument of sectorial change at scale. Green creative industries can be funded through investment in green infrastructure, sustainable cultural content can be initiated, and eco-responsible entrepreneurship can be made possible. The OECD (2020) has noted that PPPs play an important role in addressing the funding gap and delivery challenges experienced by institutions, particularly those within the Global South.

With the private sector's innovation potential and government's regulatory strength, PPPs can develop mass-level initiatives such as climate-smart innovative campuses, low-carbon music and film festivals, or green music and film production houses. Co-investment collaboration among government departments, private music and film production houses, and philanthropic actors can finance green retrofitting of cultural infrastructure and green energy-based production studios, for instance. Bakhshi and Throsby (2010) observe that collective systems of innovation are the defence wall upon which positioning sustainability within creative value chains, especially in fashion, design, architecture, and digital content creation sectors, occurs. PPPs also possess the ability to catalyse circular economy transformation by catalysing markets for recycled creative materials and eco-art supplies.

PPPs form a significant element of economies of scale in market presence and visibility. Integrated communication efforts, green labelling, and sustainability branding using PPPs can create more awareness among consumers as well as make environmentally sustainable products' competitive space on international platforms (UNESCO, 2021). Governments can also offer incentives in the form of tax credits, co-branding efforts, and policy rewards, while private operators assist through finances as well as technology's expertise. To succeed, however, PPPs need to be grafted onto participatory governance systems that ensure transparency, citizen participation, and coordination with national planning to enhance sustainability (UNCTAD, 2022). Well-designed PPPs are not merely budget tools but drivers of cultural resilience and green innovation.

Case Study 3

Sports Digitisation Meets Sustainability Imperatives

Digital events reduce mass gatherings, reducing event waste from physical event attendance and carbon footprints from event travels. In developed countries, frameworks have been established that infuse sustainability in the creative and sports industries. The European commission study (2023) on Greening the Creative Europe Programme established documents that guide sports industries on good environmental practices guide, a document on different strategies around greening in a stagewise approach, and a monitoring guide. Such documents ensure the current and future beneficiaries are well equipped to make an impact in environmental sustainability from a sports perspective.

03

RESEARCH METHODS



The analysis of the Cultural, Creative Industries and Sports (CCI&S) in this report is grounded in internationally recognised frameworks, while being adapted to the South African context and to the spatial distribution of the sector across provinces and metropolitan areas. In line with global best practice, the methodological approach draws primarily on the UNESCO Framework for Cultural Statistics¹¹ (FCS, 2009), which provides a coherent definitional structure for cultural and creative activities, and on the System of National Accounts (SNA, 2008) and serves as the statistical backbone for the construction of a satellite account for the creative economy. The UNESCO framework identifies six cultural domains—Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audio-visual and Interactive Media, and Design and Creative Services—to which South Africa has added the domain of Sports and Recreation in recognition of its economic and social significance.

3.1 Approach to calculating GDP Contribution of CCI&S

Various economic approaches and data sources are used to conduct the mapping study. The Keynesian Multiplier Analysis (KMA), referenced by Lyons in 2022, assesses overall economic shifts triggered by changes within individual sectors. However, its aggregated approach does not permit a detailed sector-specific impact assessment, making it unsuitable for this study. The Input-Output (I-O) analysis from the Supply and Use Tables (SU-Tables) offers insights into the economic interdependencies among sectors. Yet, it doesn't capture transactions involving households or international entities; hence, it can't comprehensively fulfil the study's goals. Consequently, this study employs a macroeconomic impact model based on the Social Accounting Matrix (SAM), which expands upon the Systems of National Accounts (SNA). The SAM provides a comprehensive portrayal of all economic exchanges occurring within the economy over a specified timeframe.

Data for the construction of the satellite account are derived from multiple official sources. The Annual Financial Statistics (AFS), Labour Market Dynamics Survey (LMDS), Quarterly Labour Force Survey (QLFS), General Household Survey (GHS), and the Supply and Use Tables (SUTs), alongside Input-Output Tables and the Social Accounting Matrix (SAM), provide the basis for measuring GVA and sectoral linkages. In particular, the QLFS is used to identify cultural and sports occupations at the subnational level, applying the Cultural Trident Model (Higgs and Cunningham, 2008), which distinguishes between cultural occupations in cultural industries, cultural occupations in non-cultural industries, and non-cultural occupations in cultural industries. This allows for a detailed mapping of cultural employment across provinces and metros, highlighting spatial differences in occupational structures.

3.1.1 The System of National Accounts

The System of National Accounts (SNA) is a set of international guidelines used for the development of country's economic accounts. The statistics are reported to international organisations in a manner comparable across countries. The 2008 SNA, the most recent version, consists of a coherent, consistent, and integrated set of macroeconomic accounts, balance sheets, and tables. The 2008 SNA is based on a set of internationally agreed-upon concepts, definitions, classifications, and accounting rules. It provides a comprehensive accounting

¹¹ UNESCO has released a draft updated Framework for Cultural Statistics (2025), which expands on digital, sustainability, and cross-sectoral domains. However, as it has not yet been formally adopted, this study applies the 2009 framework for consistency and international comparability."

framework within which economic data can be compiled and presented in a format designed for purposes of economic analysis, decision-making, and policymaking.

Broadly, the SNA consists of:

- The Annual Financial Statistics
- Labour Market Dynamics
- General Household Survey
- The Supply and Use Tables
- Input-Output tables
- Social Accounting Matrix



3.1.2 The CCI&S Satellite Account

In the context of national accounts, a satellite account is a framework used to provide additional information and detail on specific economic or environmental activities that are not part of the core national accounts. Satellite accounts can complement the central accounts and allow for the integration and linking of economic and environmental data. They are called “satellite” accounts because they are designed to be consistent with the central accounts (like the System of National Accounts or SNA), yet they orbit around and extend these accounts by focusing on areas of interest.

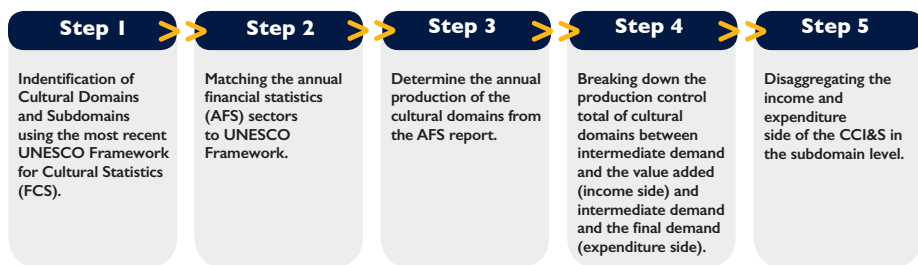
These accounts are useful for policymakers, researchers, and businesses as they offer a more detailed view of specific sectors or activities, enabling better-informed decisions and strategies. Satellite accounts adhere to the same conceptual framework as the central accounts, ensuring coherence and comparability of data. The cultural, creative, and sports industry is an account not explicitly reported in the SAM for South Africa. To address this shortcoming, a satellite account matrix for the CCI&S was built by disaggregating the CCI&S outside the SAM and then linking it back to the SAM in the required disaggregated format.

A SAM that incorporates an internal Satellite Account for the South African Cultural, Creative Industries, and Sports and Recreation was compiled to estimate the macroeconomic impact of CCI&S in terms of various macroeconomic variables such as GDP, income distribution, and employment. The underlying assumption is that the Cultural, Creative Industries, and Sports sectors can be extracted from the national account sectors and be seen as a separate sector in the economy. Utilising the 2009 UNESCO Framework for Cultural Statistics (FCS), which aligns with international and national standards through a comprehensive global consultation, the account for CCI&S is then integrated into a Social Accounting Matrix (SAM). This integration aids in quantifying the sectors’ economic contributions.

The steps to build the CCI&S Satellite Account are further defined in the sections below.

By following these steps, a comprehensive CCI&S Satellite SAM is constructed, which is then utilised in macroeconomic models to gauge the influence of CCI&S domains on key economic indicators. This structured procedure accurately measures the cultural, creative, and sports sectors’ contributions to the broader South African economy.

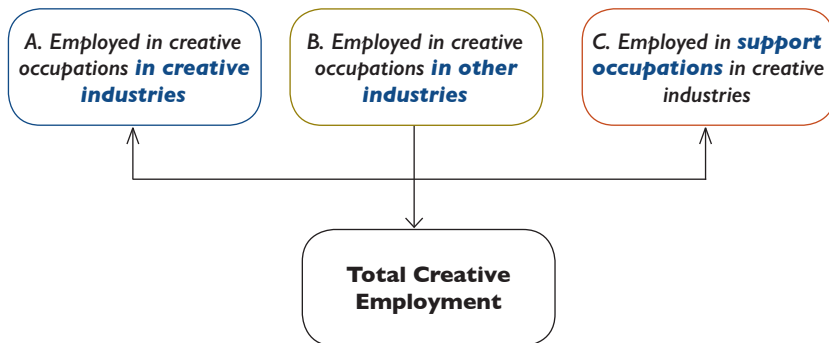
Figure 2: Steps to Build the CCI&S Satellite Account



3.2 Approach to calculating CCI&S Employment

The labour data presented is from official national data collected by Statistics South Africa. The Quarterly Labour Force Survey (QLFS) is a household survey conducted every three months, which is then pooled into an annual dataset called the Labour Market Dynamics Survey (LMDS). The UNESCO (2009) Framework points out that cultural workers may be found in cultural industries and other industries doing cultural work. A useful model for demonstrating this effect is the “Cultural Trident” (Higgs and Cunningham, 2008), which distinguishes between cultural and non-cultural occupations:

Figure 3: Cultural Trident Model



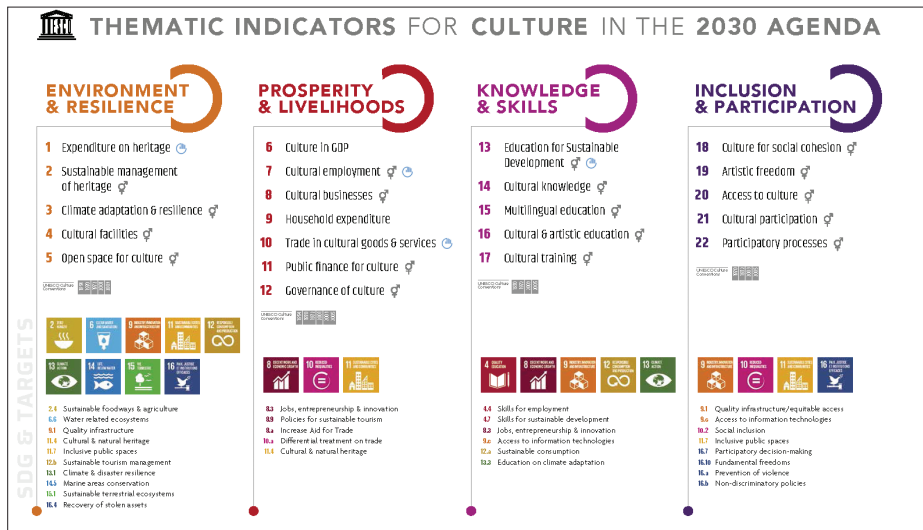
This definition gives rise to three different ways of expressing employment in the cultural sector:

- The Creative Economy includes those employed in creative occupations inside and outside the creative sector and those in non-cultural jobs in creative sector firms (A + B + C).
- Creative Industries, which is a sub-set of the creative economy, focusing on cultural and non-cultural workers, but only those employed in CCIs (A + C); and
- Creative Occupations is a sub-set of the creative economy that focuses on cultural work both in and outside cultural firms (A + B).

Using the UNESCO definitions of cultural occupations and cultural industries, this study identifies all three of these groups, as in previous mapping study reports. The data can also be used to report on how the cultural sector contributes to the Sustainable Development Goals via the UNESCO “Thematic Indicators for Culture in the 2030 Agenda” (UNESCO, 2019). Thematic indicators are divided into four sub-categories: Environment and Resilience, Prosperity

and Livelihoods, Knowledge and Skills and Inclusion and Participation. 'Cultural Employment' fits into the Prosperity and Livelihoods sub-category, which feeds into SDGs 8 (Decent Work and Economic Growth), 10 (Reduced Inequalities), and 11 (Sustainable Cities and Communities).

Figure 4: UNESCO Thematic Indicators for Culture 2030



Source: UNESCO, 2019

The cultural employment indicator is defined as “the number of people employed in the cultural and creative sectors and cultural occupations as a percentage of overall employment” (UNESCO, 2019:54).

3.3 Approach to calculating CCI&S Trade

South Africa does not have an official framework for cultural statistics that defines and classifies trade in cultural goods and sports. Like many countries globally, South Africa uses the UNESCO Framework for Cultural Statistics (2009) to define and classify cultural and sports trade.

The UNESCO Framework for Cultural Statistics outlines the trade classification system for cultural goods. This classification forms the basis for establishing the cultural and sports trade. The UNESCO FCS guides on how existing trade data can identify cultural trade in goods and services. For goods trade, the framework specifies which categories of the 2007 Harmonised Commodity Description and Coding System (HS), and the Standard International Trade Classification Revision 4 (SITC4) can be used to measure cultural goods trade. Of the two classification systems, the 2007 HS provides greater detail, with 85 six-digit HS codes identified as relevant for cultural goods trade across the six domains. The HS six-digit level provides data for South Africa's total and trade. The cultural and sports use a six-digit product code based on the Harmonised System of 2007, and is used for this analysis.

The provincial and metropolitan international trade analysis used South African Revenue Services (SARS) data and Easy Quantec data, particularly on import and export records.

04

CONTRIBUTION OF CCI&S TO THE SOUTH AFRICAN ECONOMY



4.1 Contribution to GDP

The economic contribution of the CCI&S is measured by gross domestic product (GDP). GDP is a good indicator of economic growth and welfare, as it represents, amongst others, the remuneration of employees and gross operating surplus (GOS) (profits) as components of value added to the economy.¹²

Production by the CCI&S in the years 2021 to 2023 resulted in additional GDP. The results are shown below.¹³

Table 1: CCI&S Contribution to GDP

	Direct impact	Indirect impact	Induced impact	Total impact
Impact on GDP (R millions) - 2021	85 507	98 134	67 080	250 721
Impact on GDP (R millions) - 2022	94 337	100 023	64 098	258 458
Impact on GDP (R millions) - 2023	97 080	105 731	68 363	271 174

Source: South African Social Accounting Matrix

The production activities of the Cultural, Creative, and Sports Industries (CCI&S) have experienced steady growth over the years 2021 to 2023. In 2021, the industries made a significant economic contribution, generating around R250 billion in GDP. This figure constitutes nearly 4% of the national GDP at basic prices. The industry's importance continued to increase to R271 million in 2023. The results display a healthy recovery from the COVID-19 pandemic, due to increased consumer spending. In addition, the increase in contributions from this sector may be attributed to the rise of digital platforms that have made cultural and creative content more accessible, leading to enhanced audience engagement.

On average over the years, the combined indirect and induced impacts are responsible for approximately two-thirds of this GDP contribution, underscoring the extensive multiplier effect the industry's impact on the broader South African economy. Of this contribution, around 26% is induced, stemming from labour remuneration and the subsequent consumer spending it sparks. Direct production of goods and services within the CCI&S accounts for 36% of its GDP impact, highlighting the substantial role of both the core activities of the industries and their extensive value chain.

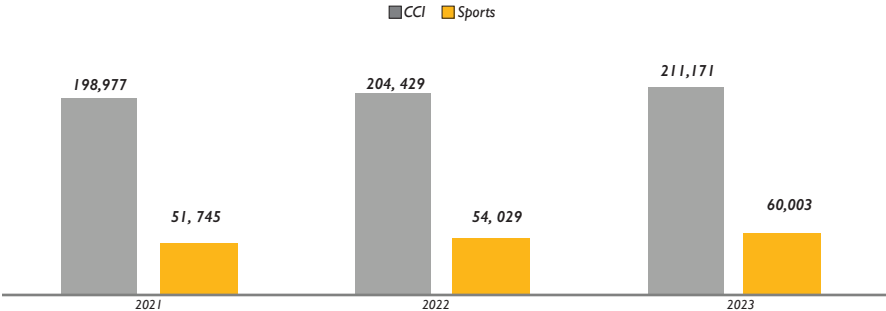
Figure 5 below shows that:

- Cultural and Creative Industries (CCI) consistently contribute the larger share to GDP, rising from 198,977 in 2021 to 211,171 in 2023.
- Sports contribute a smaller but steadily growing share, increasing from 51,745 to 60,003 over the same periods.
- Between 2021 and 2023, sports grew at 4.4% and 11.1% year-on-year, outpacing CCI growth of 3.1% and 4.9%.
- Both sectors show positive growth trends, with sports expanding relatively faster proportionally.

12 The GDP impact is reported up to 2023, as the underlying data series (Annual Financial Statistics- AFS) is only available up to 2023.

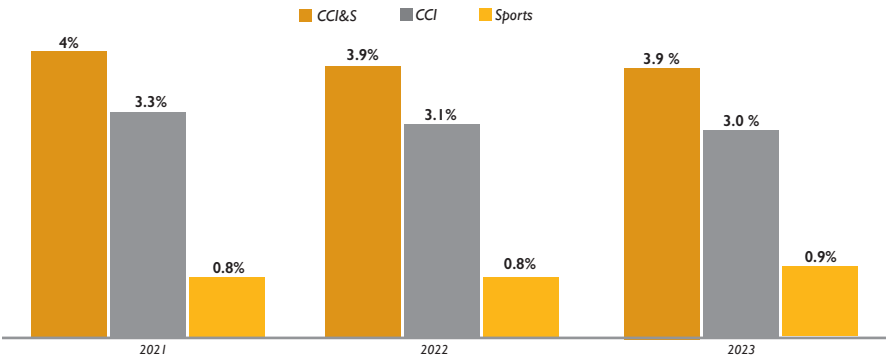
13 Source: CCI&S Satellite Account and South African SAM

Figure 5: CCI&S contribution to South Africa's GDP, 2021–2023 in (R) millions



Source: South African Social Accounting Matrix

Figure 6: CCI&S percentage contribution to South Africa GDP, 2021–2023



Source: South African Social Accounting Matrix and author calculations

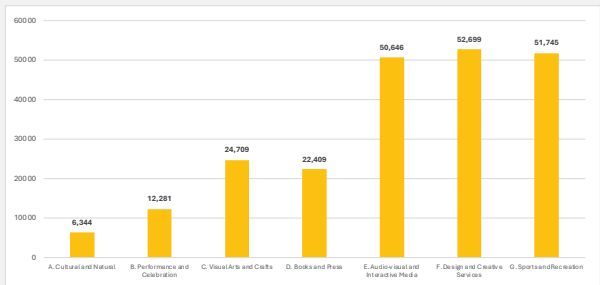
The CCI&S contribute consistently to South Africa's economy, averaging around 4% of national GDP between 2021 and 2023. Within this, the CCI contributed 3.3% in 2021, 3.1% in 2022, and 3.0% in 2023. The Sports Industry makes up a smaller but stable share, rising slightly from 0.8% in 2021 to 0.9% in 2023. This steady performance underscores the resilience of the CCI&S even in a period marked by economic uncertainty, while also highlighting the combined sector's role as a structural component of South Africa's GDP, comparable in scale to several established industries.

4.1.1 Domain Contribution to GDP

The contribution to GDP by the CCI&S is further broken down according to the domains as depicted in the following figure:

Figure 7: Domain Contribution to GDP in (R) millions

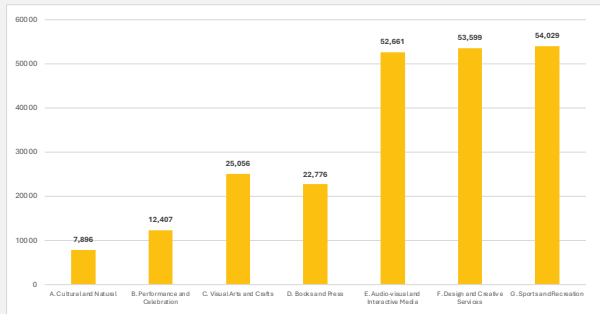
2021



Digital transformation has had a significant role in transforming the CCI&S industries. In the domain contribution for 2021, the top three domains that contributed the most GDP were the Design and Creative Services, Audio-Visual and Interactive Media and the Sports and

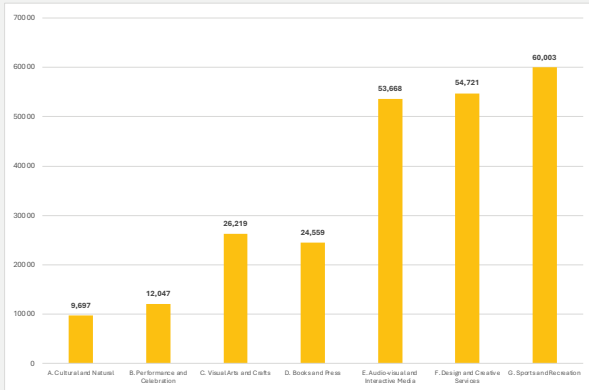
Recreation domains. The Audio-Visual and Interactive Media domain demonstrates this, achieving one of the highest contribution to GDP because of its inherent digital scalability and advanced streaming technologies. In contrast, the Performance and Celebration domain and the Cultural and Natural Heritage domain had the lowest contributions to the total GDP. This is evidence that some industries were not as flexible in implementing necessary changes emanating from the pandemic, which led to their sluggish growth compared to others that managed to bounce back.

2022



In 2022, the sports and recreation domain dominated contribution to GDP, contributing R54 billion. It was the second largest contributor in the previous year. The impact of digitisation is also evident here. Games were streamed to wider audiences.

Moreover, because of digitisation, more players can play games online with team members or players from anywhere in the world. The other sectors like the Visual Arts and Crafts and Books and Press, saw moderate increases. However, while these sectors still contribute significantly to economic growth, they do so at a lower rate compared to the Sports and Recreation, Design and Creative Services, and Audio-Visual and Media industries. This disparity is also largely due to the larger consumer base in the sports, design, and music sectors, underscoring the importance of government support for these areas.



The Sports and Recreation domain continued to dominate in 2023, contributing R60 billion to the CCI&S industries, while the other industries grew at a slower rate.

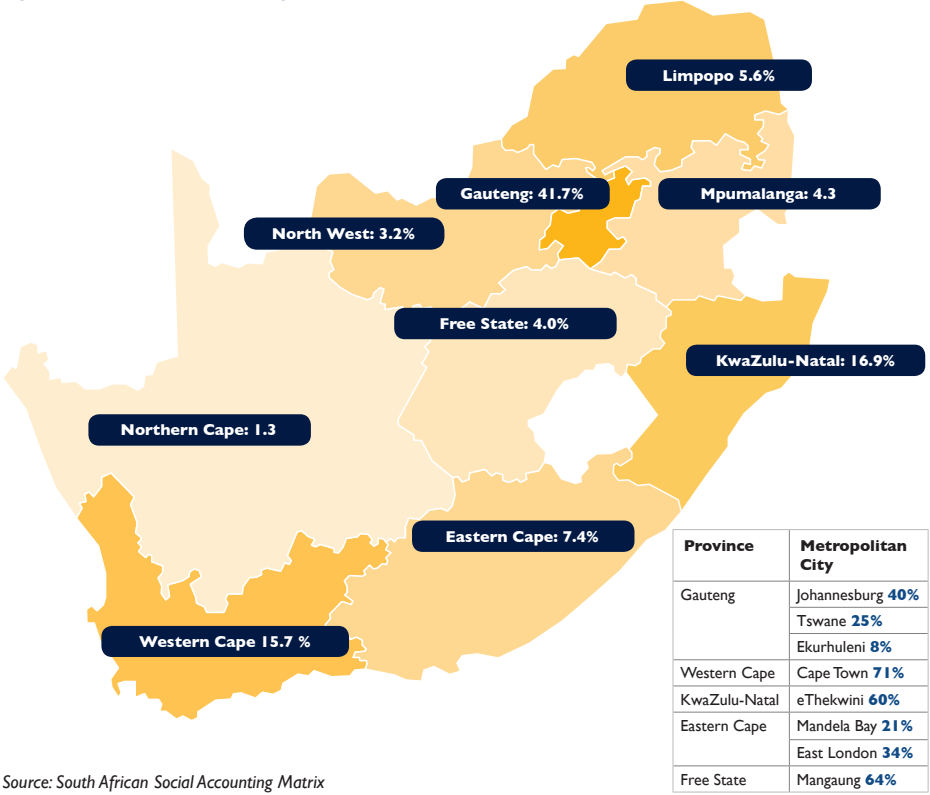
Source: South African Social Accounting Matrix

From a provincial perspective (Figure 8), a long-standing key finding is that the sector is heavily spatially concentrated in Gauteng, Western Cape, and KwaZulu-Natal provinces. These provinces account for more than 70% of the national CCI&S GDP. Gauteng dominates the contribution to the GDP, contributing 42% of the national CCI&S GDP, making it the undisputed leader in both scale and intensity.

The adoption of digital technologies and artificial intelligence (AI) reveals another axis of inequality. The three provinces, Gauteng, Western Cape, and KwaZulu-Natal, are rapidly integrating AI into design, film, advertising, and sports analytics, reinforcing their dominance and positioning them as continental leaders in the digital creative economy. Rural provinces, however, remain constrained by weak digital infrastructure and limited skills, creating a widening digital divide. This divergence highlights the risk that spatial inequalities in the sector may deepen in the absence of deliberate policy interventions aimed at inclusive digital transformation.

The distribution of GDP by metropolitan cities mirrors that of the provinces, with metropolitan cities in larger provinces accounting for the largest share of GDP contribution. The City of Johannesburg remains dominant, with the City of Cape Town, eThekweni and City of Tshwane following. These spatial distribution patterns that the provinces provide the dissemination base from which metros are able to innovate, trade and produce.

Figure 8: Provincial and Metropolitan Cities GDP Distribution



Source: South African Social Accounting Matrix

The next two tables present the GDP distribution of provinces and GVA distribution of metros by domain. The analysis further demonstrates that metropolitan dominance is not uniform across all domains. For instance, Johannesburg leads nationally in books and press. Cape Town, by contrast, has established itself as the leading hub for film, design, and digital media exports, leveraging its port infrastructure and international networks. eThekweni's strength lies in festivals, music, and sports, positioning the city as both a heritage-rich and globally connected metro. While smaller in output, Tswane is unique in its concentration of educational and heritage institutions, which underpin its identity as a knowledge and culture hub. These metro-specific specialisations explain much of the variation observed in their parent provinces' performance.

In smaller provinces, such as the Eastern Cape and Free State, metros (Buffalo City, Mangaung and Nelson Mandela Bay) are vital for sustaining provincial creative economies. These metros serve as conduits for rural creative production, enabling crafts, heritage, and performance traditions to enter formal markets. Without these urban hubs, provincial contributions to the CCI&S would be significantly diminished, underscoring the importance of urban-rural linkages in sustaining cultural and sports economies outside the dominant provinces.

Table 2: Provincial GDP Distribution by Domain

Domain	EC	FS	GAU	KZN	LIM	MPU	NC	NW	WC	Total
A. Cultural & Natural Heritage	9%	4%	2%	3%	3%	2%	8%	2%	6%	4%
Performance & Celebration	5%	3%	5%	3%	4%	3%	6%	8%	4%	4%
Visual Arts & Crafts	6%	6%	12%	8%	4%	5%	6%	6%	12%	10%
Books & Press	9%	5%	10%	7%	8%	11%	12%	13%	9%	9%
Audio-Visual & Interactive Media	16%	23%	22%	16%	18%	27%	16%	15%	19%	20%
Design & Creative Services	17%	17%	24%	13%	12%	12%	14%	20%	25%	20%
Sports and Recreation	23%	28%	14%	40%	36%	27%	19%	17%	17%	22%
Education	15%	16%	10%	10%	16%	13%	20%	19%	8%	11%

Source: South African Social Accounting Matrix

Table 3: Metropolitan Cities GVA Distribution by Domain

	Buffalo City	Nelson Mandela Bay	Mangaung	Johannesburg	Tshwane	Ekurhuleni	eThekweni	Cape Town
Cultural & Natural Heritage	17%	16%	18%	13%	8%	9%	12%	8%
Performance & Celebration	16%	15%	19%	14%	8%	10%	11%	9%
Visual Arts & Crafts	5%	8%	4%	8%	26%	22%	6%	11%
Books & Press	6%	4%	4%	22%	16%	13%	7%	15%
Audio-Visual & Interactive Media	14%	15%	15%	8%	9%	11%	17%	14%
Design & Creative Services	14%	13%	11%	7%	11%	14%	14%	16%
Sports and Recreation	12%	13%	10%	14%	16%	13%	21%	18%
Education	17%	15%	20%	14%	7%	9%	11%	9%

Source: South African Social Accounting Matrix

4.2 Contribution to Poverty Alleviation

One of the government’s mandates is to alleviate poverty, which corresponds to the zero hunger SDG. The CCI&S contributes towards poverty alleviation through its contribution to low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. Table 4 outlines the impact the industries have had on low- income households from 2021 to 2023.

Table 4: Income Contribution to Low-Income Households by Domain 2021–2023 (R millions)

Domain	2021	2022	2023
A. Cultural and Natural	1 104	928	878
B. Performance and Celebration	2 049	2 251	2 602
C. Visual Arts and Crafts	4 811	4 611	4 698
D. Books and Press	3 914	3 992	4 368
E. Audio-visual and Interactive Media	8 807	8 973	9 610
F. Design and Creative Services	8 284	7 464	8 395
G. Sports and Recreation	9 670	12 225	13 223
Education	2 151	2 071	2 123
Total	40 790	42 514	45 899

Source: South African Social Accounting Matrix

In Table 4, special attention is given to the low-income households who often struggle to sustain their livelihood. The income contribution highlights both recovery trajectories and structural shifts within the CCI&S sector for the years under consideration. In 2021, the income that supported low-income households amounted to about R40 billion, increasing to R45 billion in 2023. This demonstrates the sector’s growing effectiveness in supporting lower-income communities. The structural shifts are evident in 2023, where the education domain displayed a huge contribution. This can be attributed to the digital transformation through online courses, which are provided and have become a norm post the COVID-19 pandemic.

The sports domain’s contributions to low-income households remained substantial throughout the years. This can be attributed to its ability to generate employment and stimulate local economies through events and infrastructure, providing direct financial support to low-income households. Additionally, the audio-visual and interactive media domain also contributed the most after the sports and recreation. Through digitisation, there has been increased access to information and entertainment, creating economic opportunities that empower communities. In contrast, the lower contributions from cultural heritage and performance sectors reflect their limited outreach and commercial viability, resulting in fewer resources directed toward poverty reduction initiatives. The following Figure outlines the visual percentage contributions of CCI&S to poverty alleviation for the years 2021 to 2023.

Figure 9: Percentage Contribution of the CCI&S to Household Income in 2021–2023

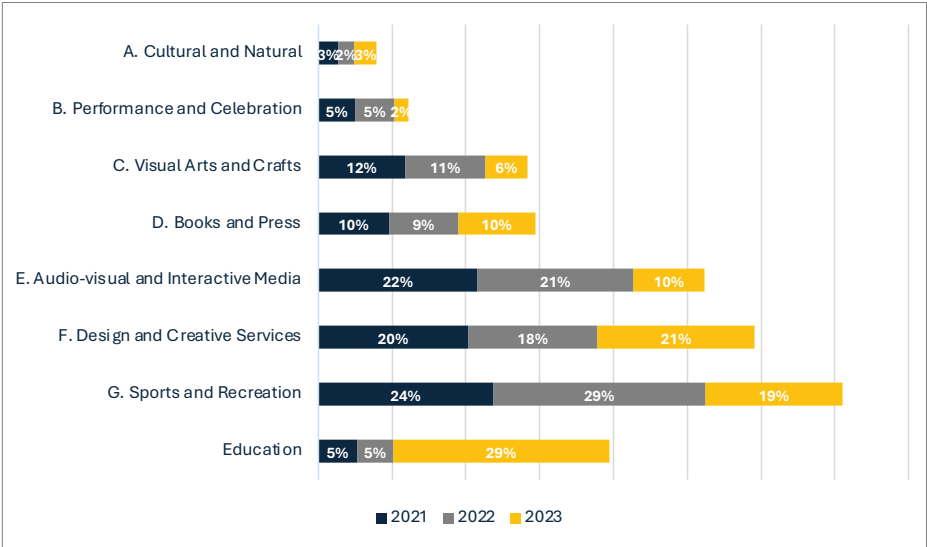


Figure 9 above presents the percentage contributions of the domains to poverty alleviation and the general well-being of households for the years 2021 to 2023. Most of the income was generated through the Sports and Recreation, Design and Creative Services, and Audio-visual and Interactive Media domains, which are expected to be in line with the GDP and employment patterns. What is noteworthy from the Sports and Recreation domains is a decline in low-income contribution between 2022 and 2023. This may be because of the sports industry’s recovery post-COVID-19, with revenues shifting to other industries. Additionally, growth has concentrated in digitised, urban, and professional segments—such as broadcasting, analytics, and events—benefiting skilled workers more than community-level participants. Limited investment in grassroots recreation and a shift toward spectator-driven value chains further reduced the trickle-down effect to poorer households.

05

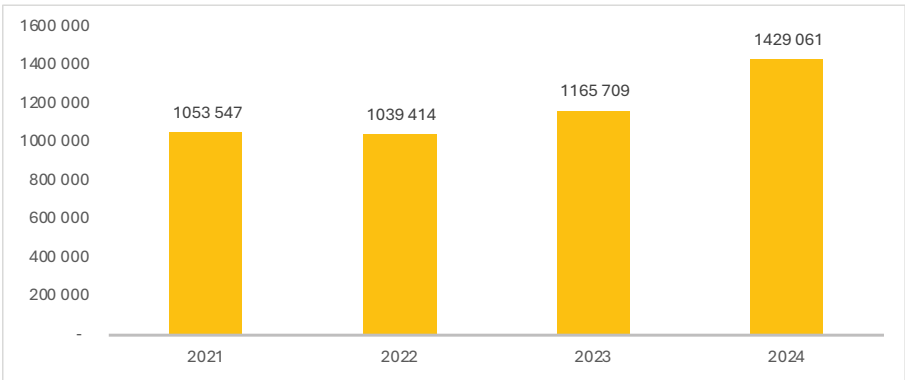
CCI&S EMPLOYMENT AND TRANSFORMATION



5.1 Employment characteristics in CCI&S

Figure 10 illustrates the employment trends within South Africa's CCI&S from 2021 to 2024, highlighting a period of fluctuating but ultimately positive growth. Between the years under consideration, the sector experienced a slight decline from 1,053,547 jobs in 2021 to 1,039,414 jobs in 2022, suggesting employment shifts among different industries. The industry showed a strong recovery in 2023, with an impressive surge of 1,165,709 jobs in CCI&S employment. The most striking growth occurred between 2023 and 2024, as the sector witnessed a substantial 23% expansion, indicating a period of robust job creation and suggesting a strengthening role for the CCI&S within the national economy. Overall, the CCI&S employment grew by 35% from 2021 to 2024. This is in line with global expectations for the industries. For example, PwC (2022) estimates the African entertainment sector to grow by 15% annually. Against this background, South African industries can benefit from support programs to reach their potential.

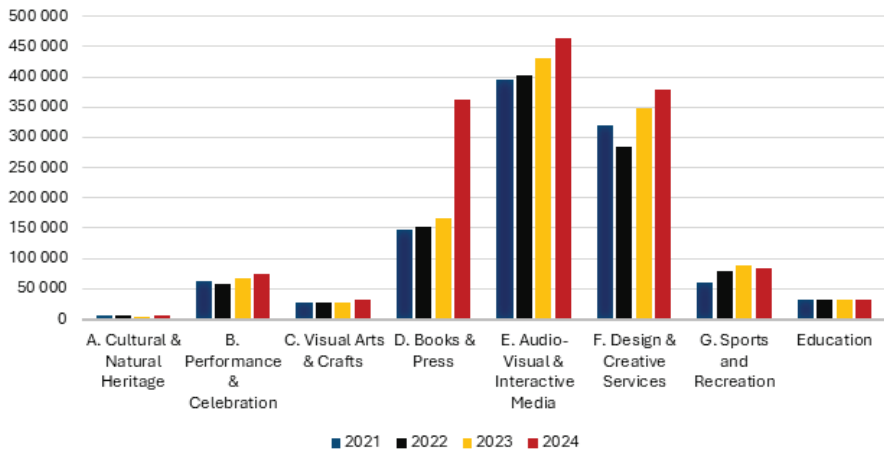
Figure 10: CCI&S employment trends



Source: StatsSA

Figure 11 breaks down employment in South Africa's CCI&S industries by domains, revealing a varied landscape of job creation across the sector. From 2021 to 2024, certain domains demonstrably outperformed in increasing their share of labour absorption. Audio Visual & Interactive Media, Design & Creative Services, and Book & Press consistently emerged as the leading employment generators within the CCI&S, suggesting strong growth and demand in these areas. Conversely, domains such as Cultural & Natural Heritage, Performance & Celebration, Visual Arts & Crafts, Sports & Recreation, and Education experienced significantly weaker employment growth during the same period. This disparity highlights a critical need to understand the factors limiting job creation in these underperforming areas and to develop targeted strategies to stimulate growth and employment opportunities across the full spectrum of South Africa's CCI&S.

Figure 11: Employment trends by domain 2021–2024

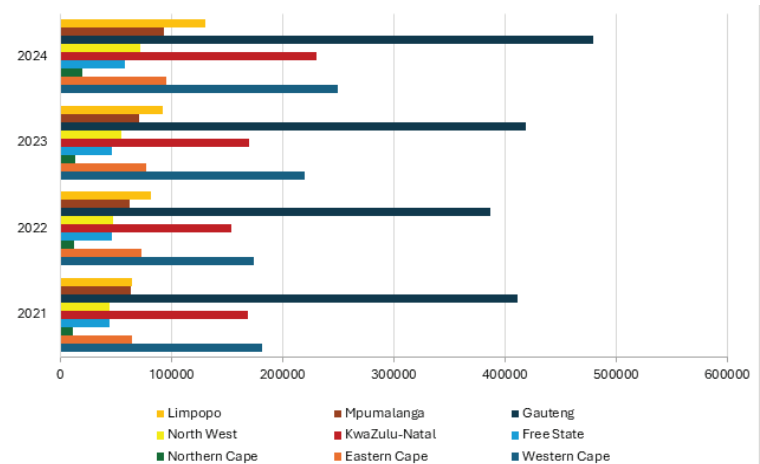


Source: StatsSA

Figure 12 displays the geographic distribution of creative economy employment in South Africa, demonstrating Gauteng Province as the dominant hub. Holding a commanding 34% share of the nation's cultural and sports occupations, Gauteng provides livelihoods for an average of 479,000 workers. The Western Cape emerges as the second-largest contributor, yet trails considerably, offering approximately 249,000 employment opportunities, representing an average of 17.5% of total CCI&S employment in 2024. Trailing further, KwaZulu-Natal's CCI&S sustains an average of 230,000 individuals (16.3%), while Limpopo accounts for roughly 130,000 positions (9%). The Eastern Cape contributes a smaller segment, employing 95,293 individuals, or approximately 7% of the sector's workforce. Remaining provinces like Mpumalanga (6.5%), North West (5%), Free State (4%), and the Northern Cape (1.4%) contribute only marginally to the overall employment numbers within the CCI&S.

This significant geographic disparity underscores the urgent need for targeted policy interventions and strategic initiatives to foster the growth and diversification of the CCI&S across underrepresented provinces, ultimately striving towards a more equitable and balanced national creative economy that benefits all regions of South Africa.

Figure 12: Employment trends by Province



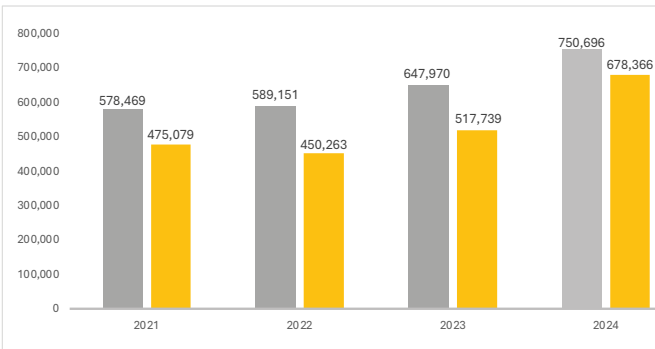
Source: StatsSA

These graphs likely serve multiple purposes, including illustrating the dynamic employment landscape within the CCI&S, identifying growth areas and domains that are driving job creation, pinpointing areas of concern where employment is lagging, and providing evidence-based insights to inform policy decisions and resource allocation.

5.2 Employment in CCI&S by Gender

Regarding gender dynamics in South Africa’s creative and sports industries, Figure 13 below largely confirms existing patterns, with men consistently outnumbering women in the overall workforce since 2021. This trend reveals a persistent gender gap. In 2022, there was even a further decline in the number of women engaged in the CCI&S industries. However, an improvement is seen in 2023, which was even stronger in 2024. Against this background, targeted initiatives are needed to promote women’s equitable participation and economic empowerment within South Africa’s creative and sports industries.

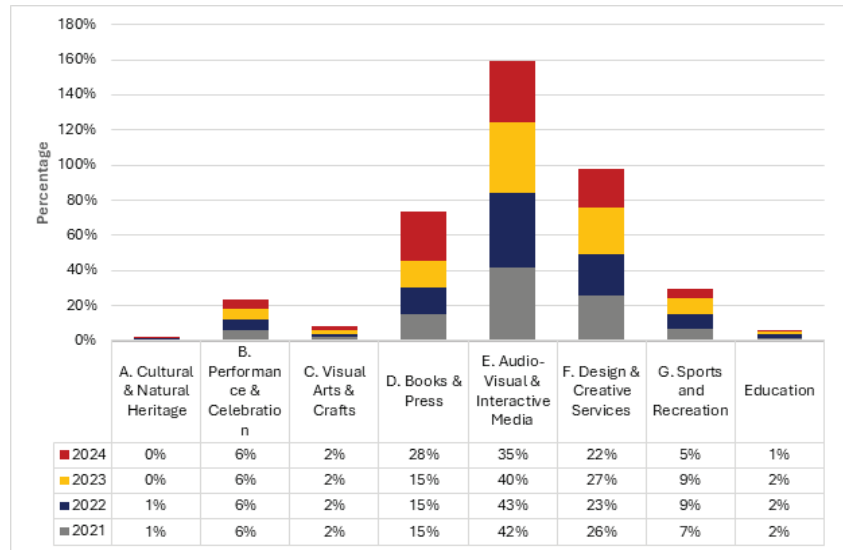
Figure 13: Employment in the CCI&S Industries by Gender from 2021–2024



Source: StatsSA

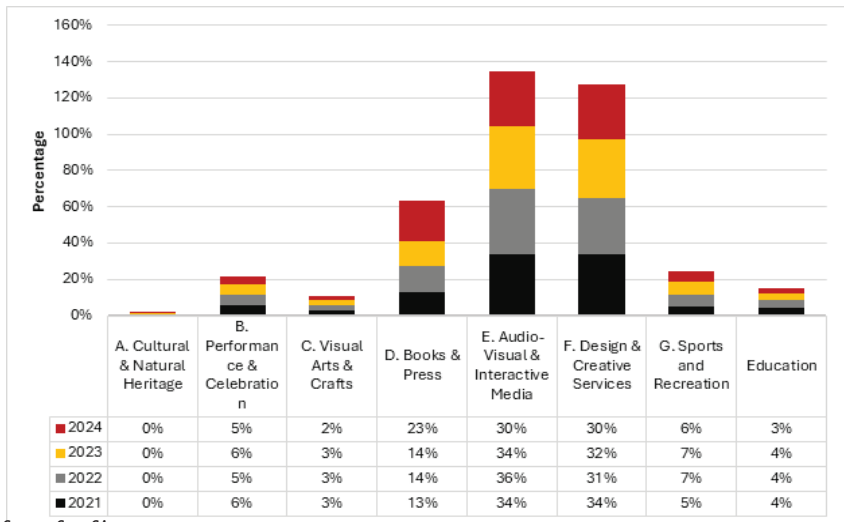
Figures 14 and 15 further highlight percentage of employment opportunities in various domains for men and women across the sector from 2021 to 2024. The more granular analysis by domain reveals a noteworthy exception: the audio-visual and interactive media sector, which stands out as the only domain consistently employing more women than men across 2021 to 2024. This suggests a potential shift in traditional gender roles within this specific area, particularly considering previous research highlighting women's underrepresentation in this field. However, increased female representation does not automatically translate to equitable economic outcomes. As Bob and Munien (2022) observed, positions predominantly held by women in the sector, such as producers, assistant directors, costume designers, and makeup artists, are often characterised by lower pay and limited decision-making authority. This underscores the importance of interventions that go beyond simply increasing the number of women employed to address issues of equity, ensuring fair compensation, and promoting access to leadership roles within the creative economy. On the contrary, males are well represented in the Audio-Visual and Interactive Media, Design and Creative Services, and Books and Press. Overall, consistent with previous reports, the significant underrepresentation of young women in cultural occupations compared to young men remains a concerning trend.

Figure 14: Employment in CCI&S Domains by Gender – Females



Source: StatsSA

Figure 15: Employment in CCI&S Domains by Gender – Males



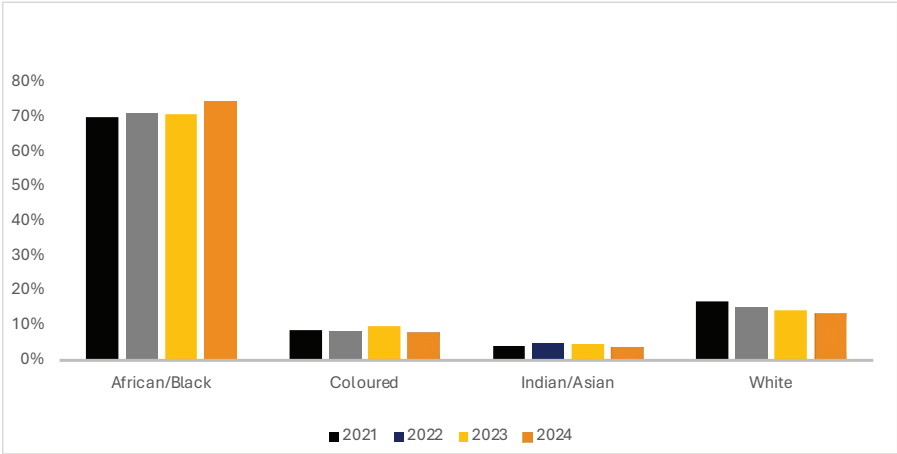
Source: StatsSA

5.3 Employment in CCI&S by Race

While not yet fully reflecting the diverse demographics of the South African population, data from Figure 16 suggests progress towards greater racial representation within cultural and sports occupations. According to Statistics South Africa's 2024 findings, African/Black individuals comprise the majority of those employed in cultural occupations, accounting for 75% of the workforce. White individuals represent 14%, Coloured individuals constitute 8%, and Indian/Asian individuals make up 4% of workers within these occupations. Notably, the representation of Indian/Asian individuals, although less than 10% of the South African population, highlights a potentially disproportionate presence within the cultural occupations workforce, suggesting specific areas or sub-sectors where this community may be more heavily represented. Continued monitoring and targeted initiatives are essential to ensure that the cultural and sports sectors fully reflect the nation's diverse population and provide equitable opportunities for all.

Figure 16 depicts employment numbers from 2021 to 2024, broken down by four racial groups: African/Black, Coloured, Indian/Asian, and White. This visual representation provides a clear overview of the racial composition of the workforce within the South African cultural and sports industries over the specified period. A key observation from the graph is the significantly higher employment numbers for African/Black individuals than for other racial groups. The figure also showcases employment figures for Coloured, Indian/Asian, and White individuals, allowing for a comparison of their representation within the cultural and sports sectors. The figure below provides valuable insights into employment equity and racial diversity within South Africa's cultural and sports industries.

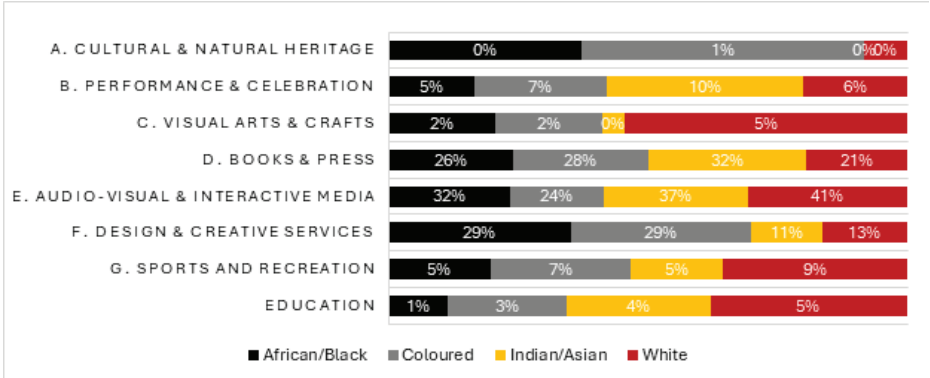
Figure 16: Employment in the CCI&S Industries by Race from 2021–2024



Source: StatsSA

The results presented in Figure 17 outline CCI&S occupations by race in 2024. The data reveals disparities of races in the domains, identifying sectors that can benefit from transformation. Sectors like the Audio-Visual & Interactive Media, where digitisation is growing remains predominantly white. Given the domains growth potential, policy makers should embark on initiatives to upskill the other racial groups, ensuring equitable participation in the digitisation benefits.

Figure 17: Employment in the CCI&S Industries Domains by Race 2024



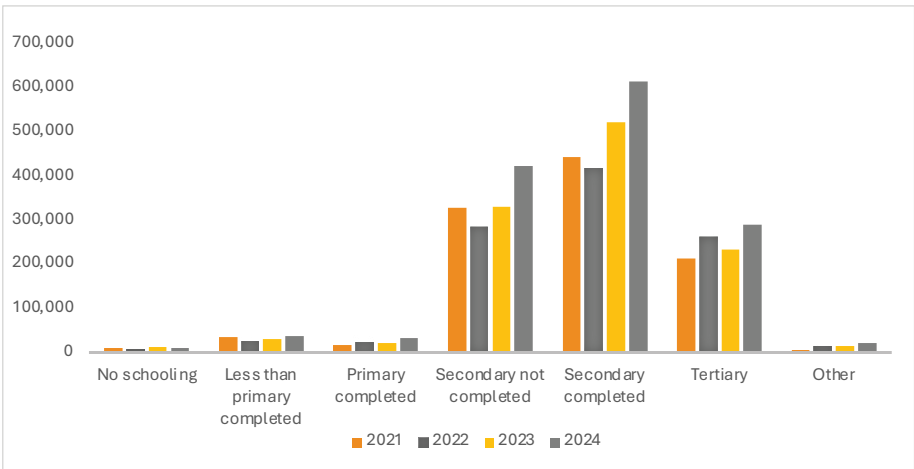
5.4 Employment in CCI&S by Education Level

Figure 18 tracks employment trends for individuals with no schooling, less than primary completed, primary completed, secondary not completed, secondary completed, tertiary education, and an "other" category. The data visually represents the relationship between education level and employment, showcasing which educational categories have the highest and lowest employment rates over the four-year period.

A general observation from the graph reveals a clear positive correlation between education level and employment. Individuals with secondary completed and tertiary education consistently demonstrate the highest employment numbers, significantly outperforming those with lower levels of education or no schooling. The graph also highlights trends over time, indicating whether employment within each educational category is increasing, decreasing, or remaining relatively stable between 2021 and 2024. This visual representation provides a valuable overview of the employment landscape concerning education levels, offering insights for policymakers and researchers interested in addressing employment disparities and promoting educational attainment.

In comparative terms, it should be noted that the number of those employed in the CCI&S, who have completed tertiary education is about half that of those who have completed secondary education. This suggests that the industry generally employs a semi-skilled labour force, therefore those who have exceeded primary education. This trend illustrates the potential for the CCI&S to absorb unemployed youth across the country.

Figure 18: Employment Trends in the CCI&S Industries by Education Level

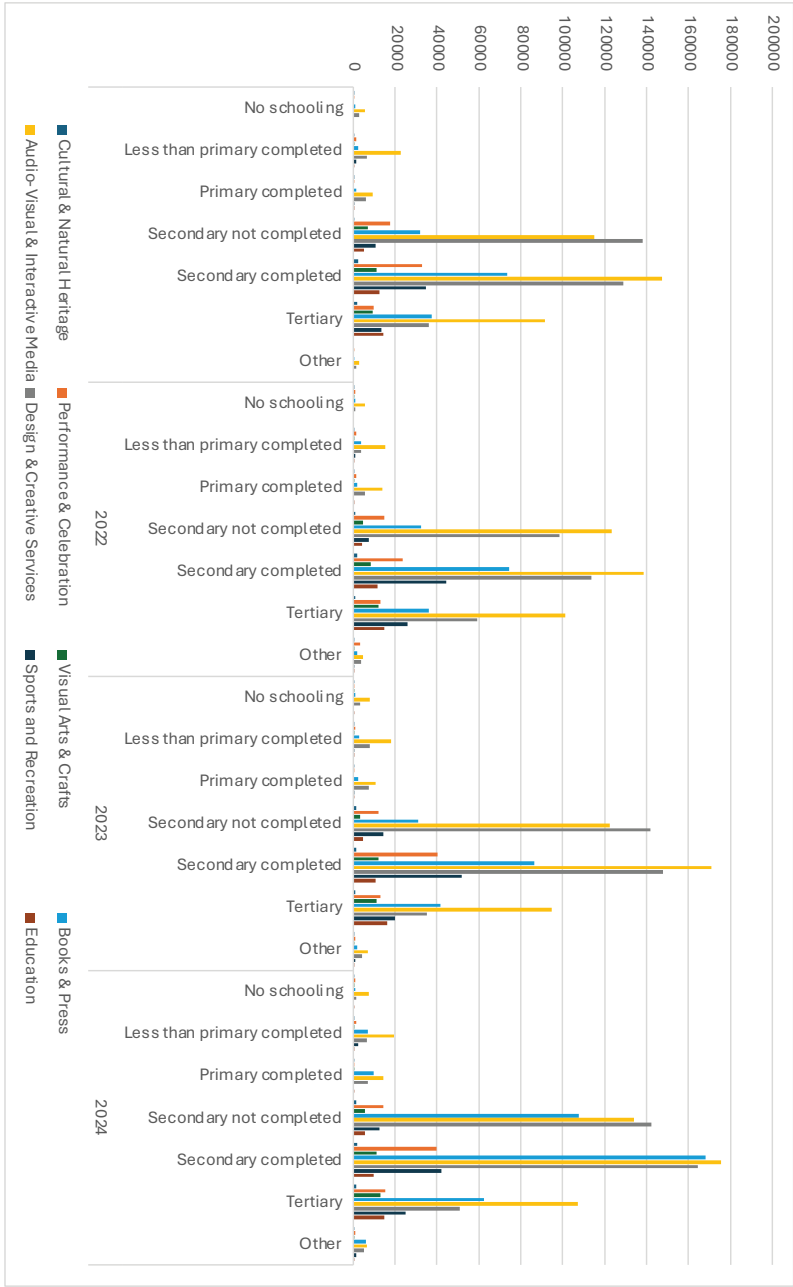


Source: StatsSA

Figure 19 displays employment trends across various educational levels and cultural sectors between 2021 and 2024. The graph categorises the workforce by their highest level of educational attainment, including "No schooling," "Less than primary completed," "Primary completed," "Secondary not completed," "Secondary completed," "Tertiary," and "Other." These educational levels are then cross-referenced with employment within several key cultural sectors: "Cultural & Natural Heritage," "Performance & Celebration," "Visual Arts & Crafts," "Books & Press," "Audio-Visual & Interactive Media," "Design & Creative Services," "Sports and Recreation," and "Education."

From a high-level view, the figure shows that certain cultural sectors exhibit higher employment figures overall compared to others, with Visual Arts & Crafts and Audio-Visual & Interactive Media showing relatively high figures. Moreover, the graph suggests that those with a Tertiary education tend to have higher rates of employment across most cultural sectors.

Figure 19: Employment Trends in the CCI&S by Education and Domain

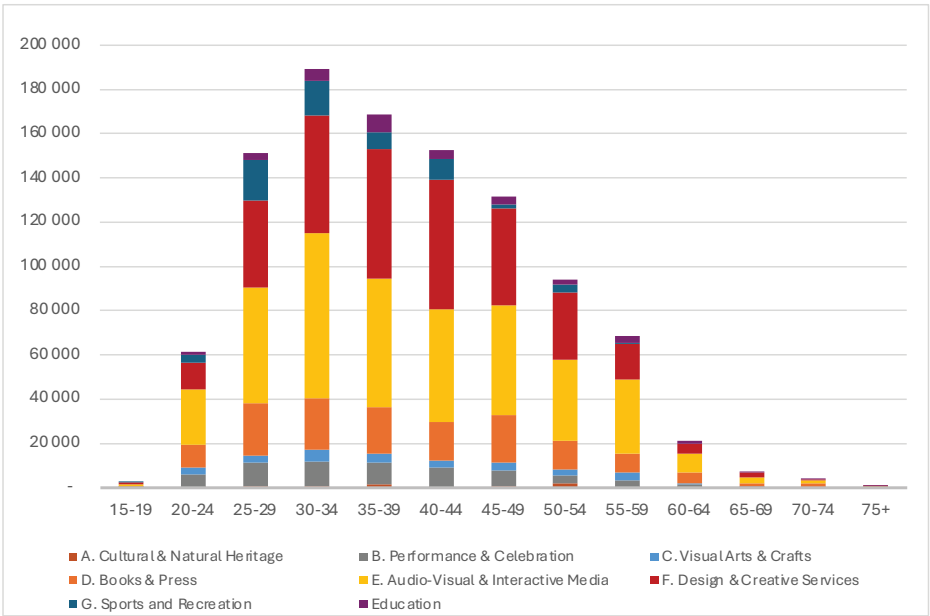


Source: StatsSA

5.5 Employment in CCI&S by Age

Figure 20 presents employment in the South African Cultural and Sports industries by Age, depicting employment distribution across various age groups within the sector in 2024. The graph segments the workforce into age brackets, providing a detailed overview of the age demographics within the South African creative and sports industries. A visual analysis of the graph suggests that the age groups 20-24, 25-29, and 30-34 (representing youth) likely represent the largest segments of the workforce within the depicted industries. There is a strong employment growth from age 20 years to age 34 years. The employment declines from age 35 to 49 years, even though at a slow rate. The Figure provides a valuable snapshot of the age composition of the sector's workforce, with the largest sections seeming to be the early-career age ranges. Also, the literature review suggests that the creative economy employs a younger population (particularly those between 15 and 29) than any other sector in the world (Salman, 2010).

Figure 20: Employment in the CCI&S Industries by Age in 2024



Source: StatsSA

06

INTERNATIONAL TRADE



This section presents an overview of CCI&S trade, highlighting its significant contribution to global trade. Despite its substantial impact, CCI&S are often underrepresented in trade statistics due to the industry's largely informal nature, comprising freelancers, gig workers, and small to medium enterprises. This informal structure poses challenges in collecting reliable data. The data provided below refer specifically to the formal components of the industries.

6.1 Impact of AI on the trade of goods and services

The demand for creative goods and services has grown due to the rise of digitization and the landscape for trade has changed (UNCTAD, 2024; OECD, 2022). The transition towards digital platforms has reshaped cultural trade by introducing new methods of distribution, specifically in audio-visual sectors, permitting developing countries to access international markets. The creative economy has become integrated and synchronized, aligning creative content such as writing, design, performance art and publishing with the core of the digital world. The transition of the sector towards digital platforms is driven by big data analytics, augmented reality (AR), virtual reality (VR), blockchain, digital marketing and artificial intelligence (AI) (Anantrasirichai et al., 2025; Kofler & El Moussaoui, 2024). AI has emerged as the predominant digital platform which has transformed the creative value chain. The use of AI tools in creative content creation, distribution and consumption has positively impacted the overall creative economy. With AI tools, creatives are better positioned to match their content with consumer preferences through audience analytics and data-driven insights. In addition, AI tools automate time consuming and complex creative tasks, particularly in the film industry (Anantrasirichai et al., 2025).

The adoption of AI is accelerating worldwide, reshaping traditional global trade methods (Yin & Sieng, 2024; Ozturk, 2024). Creative content has become innovative, which has resulted in enhanced productivity. In addition, trade costs have become lower due to AI-enhanced demand forecasting and optimization of trade routes and facilitating e-commerce exports. Other benefits of AI include the expansion of market access due to reduced trade barriers. Countries have begun to increasingly adopt AI-related provisions which promote safe and responsible AI usage in their trade agreements, such as Regional Trade Agreements (RTAs) (OECD, 2022). In the transition of South Africa's CCIs towards the use of AI, lessons can be learnt from initiatives worldwide which have leveraged technological changes in creative economies, namely China, Dominican Republic (DR), the Gambia and Malaysia (Kofler & El Moussaoui, 2024). Firstly, China has transformed its creative content, particularly traditional crafts, by heavily investing in integrated digital technologies such as 3D printing, AR and VR. In the DR, an AI strategy has been introduced to promote innovation in the creative sector. In the Gambia, a Digital Economy Master Plan has been launched to address digital copyright threats within creative industries and transform trade methods for creative goods and services to incorporate AI. While in Malaysia, traditional performing arts have been blended with AR/VR, highlighting an innovative shift towards digitization in cultural heritage.

Despite the opportunities that emerge from the adoption of AI tools in creative content, several challenges have emerged. AI has increased market concentration and promoted monopolistic behaviour, which has negatively affected revenue generation for creatives (Ozturk, 2024). AI tools have the capacity to collect intimate personal data, where creative work may be used without the creator's consent, which conflicts with human rights protection and poses a risk to the privacy of creatives. Creative content generated by AI undermines authorship, ownership and copyright, resulting in ethical and legal challenges. AI threatens ethical integrity by undermining transparency, accountability and fairness (Jääskeläinen et al., 2022). Furthermore, AI systems require specialised

skills to develop and maintain, and the shortage of trained professionals within creative industries has resulted in the digital exclusion of many creatives in the sector.

Effective trade policies are crucial to harness the positive impact of AI technologies on international trade of creative goods and services. For instance, countries should enter into trade agreements which lower tariffs and non-tariff barriers on creative goods and services (OECD, 2022). Policies which facilitate the acceleration of knowledge transfer and movement of AI-skilled creators in the creative industries. Data governance is also essential in ensuring harmonised regulations across borders for effective AI technology functionality (Ozturk, 2024).

6.2 South Africa’s cultural goods trade

South Africa’s exports of cultural goods have been on a downward trend between 2020 and 2023, declining from \$316 million in 2020 to \$278 million by 2023 before picking up to \$303 million by 2024. The decline in 2020 was anticipated, attributed to the impact of the COVID-19 pandemic. However, with improvements in the global economic situation, the trend is showing signs of recovery. The trade balance has shown positive performance over the years, transitioning from a surplus of \$58 million in 2020 to \$73 million by 2022 and \$64 million in 2024.

Table 5: South Africa’s cultural goods trade: US\$ millions, percentage shares and average annual growth rates relative to total commodity trade (2020-2024)

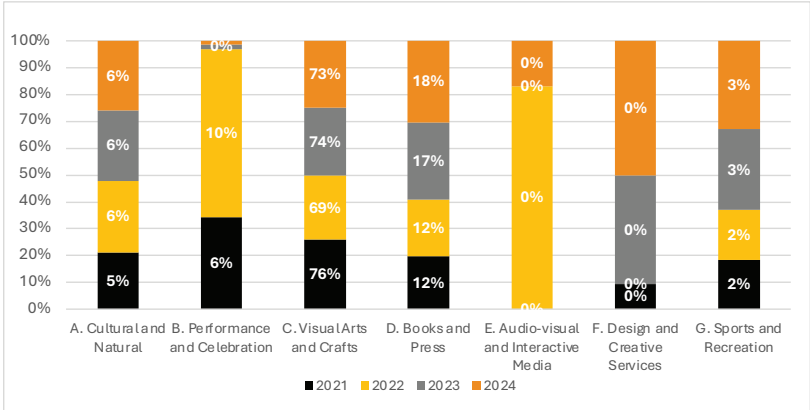
Cultural goods	2020	2021	2022	2023	2024
Exports (US\$ million)	316,46	313,94	296,25	278,46	303,66
Imports (US\$ million)	257,80	240,34	224,24	209,02	239,43
Trade balance (US\$ million)	58,66	73,60	72,01	69,44	64,23
Exports (% share of commodity exports)	0.37%	0.26%	0.24%	0.25%	0.28%
Imports (% share of commodity exports)	0.38%	0.15%	0.20%	0.19%	0.24%
Average annual growth rates (%)	2018–2020	2020–2021	2021–2022	2022–2023	2023–2024
Cultural goods exports	-16,03	-0.8%	-5.6%	-6.0%	9.1%
Cultural goods imports	-26,19	-6.8%	-6.7%	-6.8%	14.6%
Total commodity exports	-5,12	44.4%	-0.1%	-10.5%	-0.2%
Total commodity imports	-14,52	36.3%	19.5%	-4.1%	-5.6%

Source: World Integrated Trade Solutions

In Figure 21, between 2021 and 2024, the Visual Arts and Crafts, Books and Press, and Performance and Celebration domains emerged as the primary exporters of cultural goods, collectively accounting for almost 90% of exports in 2021. Notably, the Visual Arts and Crafts domain contributed the majority share, comprising 76% of total exports in 2021, 69%, 74% and 73% in 2022, 2023 and 2024, respectively. This domain encompasses a wide range of items such as paintings, crafts, and jewellery. The uptick in exports within this domain could be attributed to

the improvement in global supply chains following the COVID-19 pandemic. Projections for the future suggest a further increase in the Art industry, with anticipated growth to \$103 million by 2026 from \$89 million in 2021.

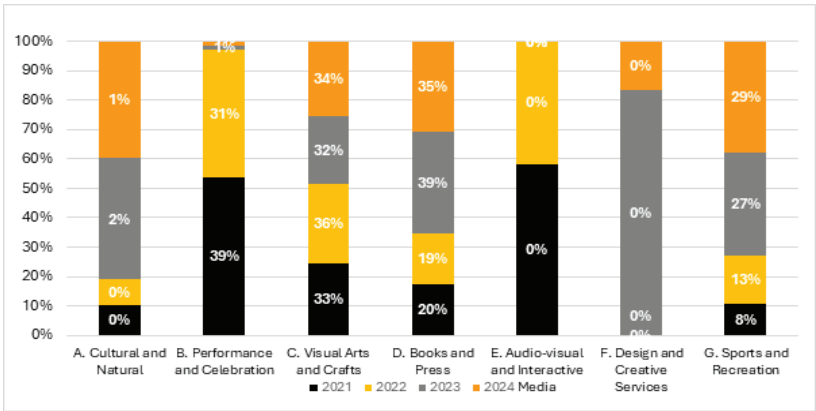
Figure 21: South African Cultural Goods Exports, 2021–2024 (\$US millions)



Source: World Integrated Trade Solutions and author calculations

Similarly, Figure 22 shows that cultural imports between 2021 and 2024 were predominantly from the Visual Arts and Crafts, Books and Press, and Performance and Celebration domains. Performance and Celebration accounted for the largest share of imports at 39%, followed by Visual Arts and Crafts at 33%, and Books and Press. Following COVID-19 lockdowns, there was a renewed appetite for entertainment, particularly in the form of concerts, driving increased trade in performance and celebration items, which include musical instruments among other items.

Figure 22: South African Cultural Goods Imports, 2021 - 2024 (\$US millions)



Source: World Integrated Trade Solutions and author calculations

6.3 South Africa's cultural goods trade by region, with a focus on USMCA and SADC

The table below displays the shares of exports and imports of South African trading partners. The primary trading partner for South Africa's cultural goods is the USMCA region, importing \$183 million (60%) worth of such goods in 2024, down from \$194 million (62%) in 2021. The SADC and Middle East regions emerge as significant trading partners, importing goods valued at \$55 million (18%) and \$30 million (9.9%) in 2024, respectively. Notably, the Middle East region increased its exports from \$4 million to about \$30 million between 2021 and 2024. On the other hand, exports to East Asia declined significantly from \$16 million in 2021 to \$7 million in 2024.

Table 6: South Africa's cultural goods trade shares with selected regions 2021 and 2024
(US\$ millions and regional shares)

Region	2021				2024			
	Exports	% Exports	Imports	% Imports	Exports	% Exports	Imports	% Imports
USMCA	194,05	61,81	33,67	14,01	183,13	60,31	44,98	18,79
EU28 (including UK)	35,22	11,22	78,01	32,46	17,63	5,81	77,07	32,19
Rest of SADC	56,90	18,13	49,95	20,78	55,48	18,27	8,77	3,66
Rest of BRICS	1,58	0,50	1,58	0,66	2,47	0,81	2,80	1,17
Rest of Africa less SADC	4,88	1,55	0,59	0,25	6,70	2,21	0,48	0,20
Middle East	4,42	1,41	1,34	0,56	30,16	9,93	2,74	1,14
Latin America less Brazil	0,74	0,23	0,67	0,28	0,74	0,24	1,88	0,78
East Asia less China	4,61	1,47	8,63	3,59	7,20	2,37	23,09	9,64
Rest of the World	11,55	3,68	65,91	27,42	0,14	0,05	77,63	32,42
World Total	313,94	100,00	240,34	100,00	303,66	100,00	239,43	100,00

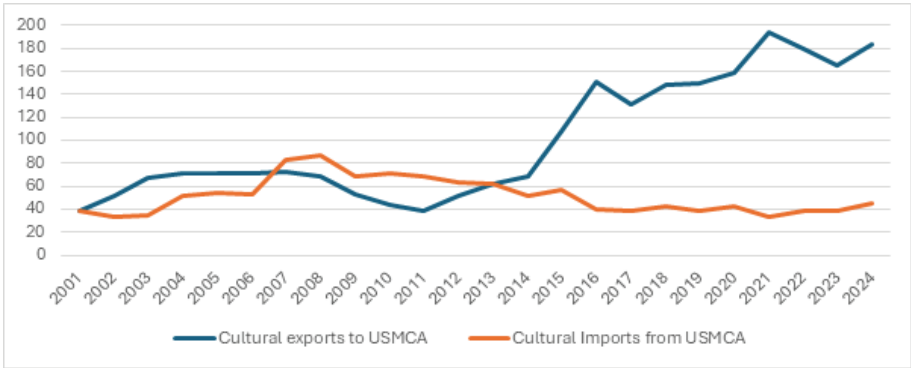
Source: World Integrated Trade Solutions and author calculations

On the import side, the table indicates that the Rest of the World accounted for about 32.42% (US\$ 77.63 million) of cultural goods imports for South Africa in 2024. This was followed by the EU28 (including the UK) with an import share of 32.19% (US\$77.07 million). The USMCA bloc (mainly the US) reported about 18.79% (US\$44.98 million) of cultural goods imports in 2024 (up from \$33 million in 2021). In 2024, the rest of East Asia (less China) with a share of 9.64% followed. The SADC region accounted for approximately 3.66% of South Africa's cultural goods imports in 2024 while the Rest of Africa (less SADC) reported about 0.20%. The SADC region's share of imports decreased sharply from 20.78% in 2021 to just 3.7% in 2024.

Furthermore, in 2024, South Africa maintained a significant cultural goods trade surplus with

the USMCA, followed by SADC. The trade surplus with the Middle East grew slightly in 2024, indicating that there is scope for further cultural goods export promotion to this region, in line with the recommendations of South Africa’s 2012 Trade Policy and Strategy Framework update document (dti, 2012). In Figures 23 and 24 below, South Africa’s cultural goods trade with the USMCA and SADC shows that the USMCA bloc has become an increasingly important destination for South Africa’s cultural goods exports over the period under study.

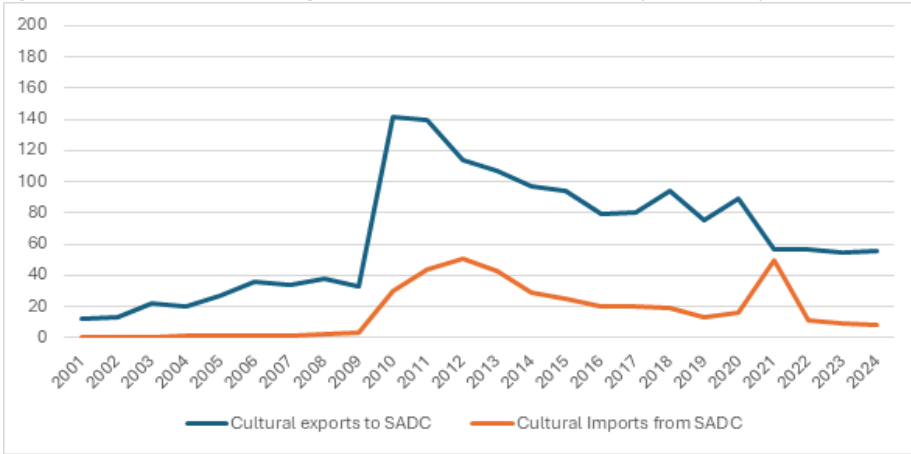
Figure 23: South Africa’s cultural goods trade with USMCA 2001–2024 (US\$ millions)



Source: World Integrated Trade Solutions and author calculations

In the case of South Africa’s cultural goods trade with SADC, Figure 24 indicates the consistent trade surplus in South Africa’s favour over the period under study.

Figure 24: South Africa’s cultural goods trade with SADC 2001–2024 (US\$ millions)



Source: World Integrated Trade Solutions and author calculations

Both the USMCA and SADC regions are important trading partners for South Africa in their bilateral commodity trade as well as their cultural goods trade.

6.4 South Africa's cultural services trade in the context of AI and digitisation

The growing digitisation has increased the importance of services trade categories in the identification and measurement of cultural trade. However, the lack of services data availability limits any level of disaggregation to measure cultural services trade adequately. This is evident in low- and middle-income countries. The data and methodology section of this report has described the services trade categories and data sources that are available to analyse South Africa's cultural services trade. Table 9 below presents trends in South Africa's services trade categories related to cultural services trade for the period 2018 to 2024, using SARB services trade data.

Table 7: South Africa's trade in services sectors relevant for cultural services trade 2018–2024

Services trade in R millions	2018	2019	2020	2021	2022	2023	2024
Personal travel Exp	108 646	111 248	37 873	29 763	72 305	95 842	107 235
Imp	32 382	33 643	10 192	10 772	27 400	33 288	34 400
Balance	76 264	77 605	27 681	18 991	44 905	62 554	72 835
IP use charges Exp	2 420	2 175	2 074	2 001	3 386	3 095	4 012
Imp	20 280	19 599	19 644	21 445	23 775	30 099	30 406
Balance	-17 860	-17 424	-17 570	-19 444	-20 389	-27 004	-26 394
Telecoms, ICT services Exp	8 427	9 997	11 699	12 240	15 507	24 754	27 969
Imp	30 127	36 224	42 557	47 753	57 680	72 541	76 895
Balance	-21 700	-26 227	-30 858	-35 513	-42 173	-47 787	-48 926
Advertising Exp	3 337	3 528	3 061	3 301	4 439	5 333	6 292
Imp	3 842	4 212	4 171	4 433	5 258	6 739	10 781
Balance	-505	-684	-1 110	-1 132	-819	-1 406	-4 489
Architectural, engineering & other Exp	9 592	6 682	7 627	11 519	13 723	17 579	20 235
Imp	11 347	13 585	11 302	8 493	10 625	11 612	13 771
Balance	-1 755	-6 903	-3 675	3 026	3 098	5 967	6 464
Personal, cultural & recreational Exp	5 331	5 722	3 460	5 715	8 213	8 319	9 338
Imp	1 274	2 239	2 038	2 144	2 585	5 054	6 315
Balance	4 057	3 483	1 422	3 571	5 628	3 265	3 023
AV & related Exp	3 055	3 184	2 363	5 108	7 511	-	-
Imp	389	508	446	2 035	2 303	-	-
Balance	2 666	2 676	1 916	3 073	5 209	-	-
Other PCR services Exp	243	257	272	286	428	-	-
Imp	65	104	23	4,99	4,95	-	-
Balance	178	152	249	281	423	-	-
Total services Exp	225 187	229 706	139 658	137 082	210 780	266 763	294 944
Imp	224 691	238 369	184 594	202 750	301 792	348 096	366 830
Balance	496	-8 663	-44 936	-65 668	-91 012	-81 333	-71 886

Source: SARB Quarterly Bulletin, June 2025 (S-92 and S-93)

The data indicate that South Africa performed comparatively well in several service sectors. Particularly, South Africa had a relatively large and growing trade surplus between 2018 (R108 646 million), 2019 (R111 248 million) and 2024 (R107 235 million) in Personal travel services.

Between 2018 and 2019, the trade surplus increased (from R76 264 million to R77 605 million) and a relatively large R72 835 million share in 2024, as Personal travel exports grew more than imports. The effects of the COVID-19 pandemic are reflected in the decline in the exports of the Personal Travel Services to approximately R37 873 million in 2020, followed by a sharp decline to R29 763 million in 2021. The imports of these services remained consistent in the region of approximately R30 million in 2018 and 2019; however, a sharp decline was observed in 2020 and 2021, further reflecting the effects of the pandemic.

South Africa's personal travel services trade balance declined from R27.7 billion in 2020 to about R19 billion in 2021, largely reflecting the pandemic's lingering impact on tourism-related flows. Within the UNESCO FCS, this sector—classified under Related Cultural Services and Tourism—recorded its lowest performance in 2022 (R428 million), though it maintained a positive trade balance throughout 2018–2024. The Audio-Visual and Related Services sub-sector remained the strongest performer, with exports consistently outpacing imports since 2009, even as data limitations obscured trends for 2023 and 2024.

Between 2019 and 2020, several service sectors experienced a noticeable decline, including Architectural, Engineering, and Other Technical Services, which incorporates the Architectural Services sub-sector. From 2021 onward, however, these sectors showed signs of recovery, with exports steadily improving through 2024. Significant growth was also recorded in Telecommunications, Computer, and Information Services, a category critical to both core cultural services (through information services) and supporting materials (including computer services and software licensing). Nevertheless, the rapid rise in imports has widened South Africa's trade deficit in this sector, making it—alongside Charges for the Use of Intellectual Property—one of the two largest sources of cultural trade imbalance. Interestingly, the intellectual property sector appears to have been relatively insulated from the pandemic, as evidenced by the continued increase in imports throughout the period. However, this growth has further exacerbated the trade deficit in intellectual property-related services.

6.5 Provincial Trade

The table and figures below indicate that Gauteng dominates the trade space and accounts for most of South Africa's cultural exports and imports, with particular strength in design, audio-visual and interactive media, and sports goods. Gauteng's integration into global value chains is reinforced by its international connectivity, creative clusters, and digital infrastructure. The Western Cape and KwaZulu-Natal also make significant contribution to the CCI&S trade.

Provincial Exports and Imports

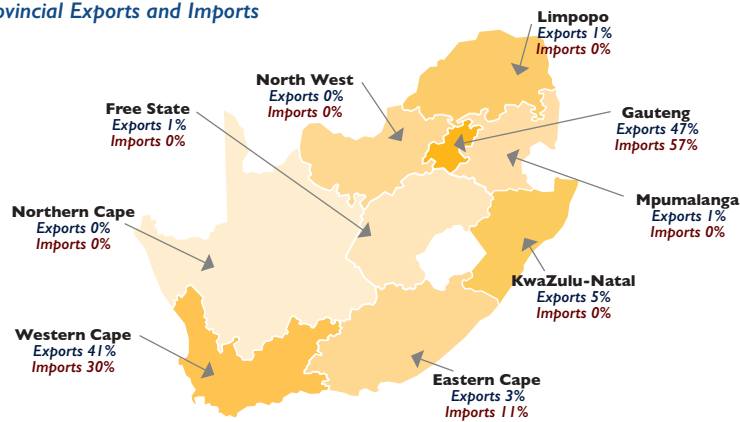
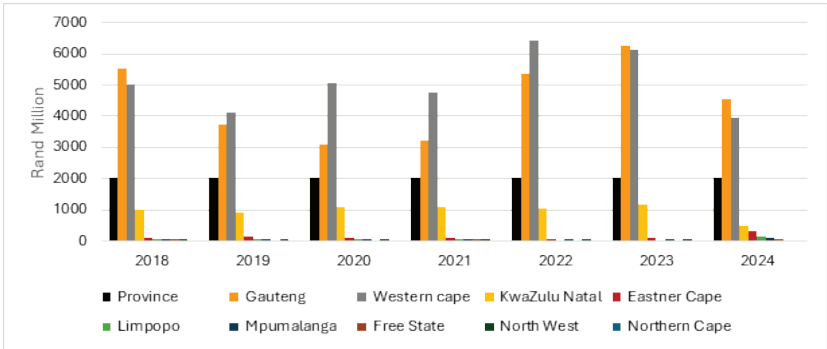
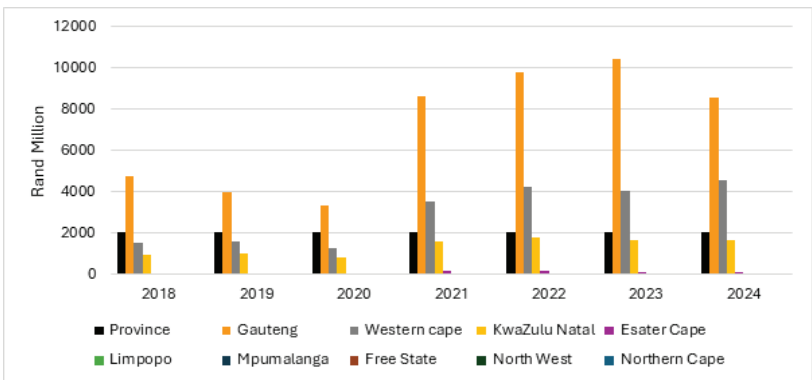


Figure 25: Provincial Exports (R millions)



Source: Quantec data

Figure 26: Provincial Imports (R millions)



Source: Quantec data

07

KEY FINDINGS AND POLICY IMPLICATIONS



The CCI&S have emerged as dynamic pillars of South Africa's economy, contributing to leisure and entertainment and innovation, competitiveness, employment, and social development. This study employed a Macroeconomic Impact Assessment Model embedded within a Social Accounting Matrix (SAM), supported by a dedicated CCI&S Satellite Account, to quantify the sector's economic footprint. The findings confirm that CCI&S make a sizeable and growing contribution to national development.

Employment Impact

Jobs supported: 1.1 million (2021)

Jobs supported: 1.4 million (2024)

Economic Contribution (2021–2023)

Average GDP share: 3.9%

Value added: R250 bn → R271 bn

Household Income

Total income: R220 bn → R244 bn

To lower-income households: 12% (≈ R45 bn)

Fiscal Contribution

Tax revenue: R103 bn → R117 bn

Funds key public services: education, healthcare, housing

Between 2020 and 2023, exports declined from \$316 million to \$278 million before picking up to \$303 million by 2024. During this period, the trade balance has shown positive performance, transitioning from a surplus of \$58 million in 2020 to \$73 million by 2022 and \$64 million in 2024.

At a domain level, Design and Creative Services, Sports and Recreation, and Audio-Visual and Interactive Media were the largest contributors to GDP and employment, while also leading in capital formation—an indicator of future growth potential. Within Audio-Visual and Interactive Media, investment patterns reflect the rapid adoption of new technologies. By contrast, cultural and natural heritage, performance, and celebration contributed the least, a legacy of the COVID-19 pandemic and associated restrictions, though some recovery was evident by 2023.

Employment analysis further illustrates the sector's dynamism. By 2024, the CCI&S accounted for 7.2% of total employment in South Africa, or about 1.4 million positions, slightly below the global average but indicative of strong growth potential. After a modest expansion in 2022, job creation accelerated sharply, rising 8.5% in 2023 and a further 15.5% in 2024. The domains of Audio-Visual & Interactive Media, Design & Creative Services, and Books & Press consistently generated the most jobs, with Books & Press defying international contraction trends. Employment remains concentrated in Gauteng (34%), Western Cape (17.5%), and KwaZulu-Natal (16.3%), though provinces such as Limpopo and Eastern Cape play meaningful, if smaller, roles.

The sector's workforce reflects both progress and persistent inequalities. African/Black South Africans account for 75% of jobs, and the age profile is skewed toward youth aged 20–34 years, highlighting the sector's importance for addressing unemployment. However, women remain underrepresented in ownership and in several domains, though encouragingly, they outnumber men in Audio-Visual & Interactive Media. Most workers hold secondary or tertiary qualifications, while semi-skilled labour continues to play a critical role, reinforcing the sector's potential as a youth absorber.

From a trade perspective, South Africa's CCI&S exports display resilience and volatility. While global cultural trade slowed in 2024, South Africa's cultural exports and imports rebounded, with Books & Press, Design & Creative Services, and Visual Arts and Crafts driving performance. The United States–Mexico–Canada Agreement (USMCA) region, the rest of the SADC, and the Middle East emerged as South Africa's most important cultural export destinations. At the same time, the EU28, East Asia (excluding China), and BRICS partners played a larger role in imports. Intra-industry trade with SADC, particularly in design and craft, reflects growing value-added activity, though trade with BRICS partners remains largely inter-industry, involving the exchange of lower-value commodities for high-value manufactures.

Two cross-cutting trends are reshaping the future of the sector: artificial intelligence and digital technologies, and the imperative of sustainability. AI tools are transforming content creation, distribution, and consumption, with South African creatives increasingly using generative AI for music, design, and media production. While these tools create new efficiencies and markets, they also raise concerns around intellectual property, ethics, and digital exclusion. Sustainability, meanwhile, is reshaping both production and consumption. Creative enterprises are experimenting with recycling, upcycling, green events, and digital workflows that lower carbon footprints. At the same time, artists and athletes are powerful storytellers, using digital platforms to amplify awareness of climate change and sustainable practices.

Spatial analysis reinforces the importance of metropolitan hubs—Johannesburg, Cape Town, Tshwane, and eThekweni—as anchors of cultural production, trade, and digital innovation. Yet smaller provinces such as Limpopo and the Northern Cape play a critical redistributive role, directing a larger share of CCI&S income to poorer households. Policy frameworks must therefore balance the consolidation of globally competitive metros with the empowerment of smaller provinces and communities, ensuring inclusive growth.

In conclusion, CCI&S represent a sector at the forefront of South Africa's economic and social transformation. They contribute significantly to GDP, employment, household income, government revenue and trade, while also embodying innovation, sustainability, and cultural identity. To fully unlock this potential, policies must address persistent inequalities, bridge digital divides, strengthen intellectual property protections, diversify export markets and invest in creative and green skills. By doing so, South Africa can position its cultural, creative, and sports industries as not only drivers of competitiveness and global integration, but also catalysts for inclusive and sustainable development.

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