south african **cultural observatory**

Research Report

Cultural and Creative Industries Economic Trends over the last 10 years

Submitted to: Department of Sports, Arts and Culture | **Submitted by:** Nelson Mandela University

sport, arts & culture
Department:
Sport, Arts and Culture
REPUBLIC OF SOUTH AFRICA

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South African Cultural Observatory

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31 March 2025

Table of Contents

List of figures and Tables *5*

Executive Summary *7*

1 Introduction: CCI Context and the Goals of the Report *8*

2 Research Methods and Data *10*

3 Techno-Economic Trends *11*

3.1 Digital Platforms 11

3.2 NFTs and Blockchain 15

3.3 Generative Artificial Intelligence (AI) 18

4 Work and Labour Market Trends *22*

4.1 The Gig Economy and Freelance Work 22

4.2 Industry Associations and Support Networks 26

4.3 Hybrid and Online Work 28

5 International Trade Trends *31*

5.1 Diversity in Cultural Trade and Regional Blocs 31

5.2 Rise in Services Trade as Cultural Products Dematerialise 33

5.3 South-South Cultural Trade 38

6 Managing the Creative Economy *40*

6.1 Cultural Policy 40

6.2 Intellectual Property and copyright 43

6.3 Public funding for the CCIs 45

6.4 Cultural and Creative Leadership 50

7 Demand Side and Cultural Consumption Trends *52*

7.1 7.1 Digital Cultural Consumption 52

7.2 The Role of Social Media and User-Generated Content in Shaping Demand 55

7.3 Environmental Sustainability and Ethical Consumption 57

8 Online Focus Group Results: What South African CCI Stakeholders Think *59*

Techno-Economic Trends 60

Creative Work and Labour Market Trends 62

Demand-Side and Cultural Consumption Trends 63

Section Conclusion **64**
9 Opportunities and Challenges for South African CCIs ***65***
10 Conclusions ***71***
References ***73***

List of figures and Tables

Figure 1. UNESCO Framework for Cultural Statistics (2009) 8

Figure 3. Netflix subscribers by country 2024 12

Figure 4. Global music streaming revenue 2005 – 2023 13

Figure 5. Total sales value of art and collectables NFTs worldwide 2019 – 2023 16

Figure 6. How NFTs can be used to facilitate sale of digital artworks 17

Figure 7. Artificial Intelligence Market: Market Compound Annual Growth Rate (%) by region 19

Figure 8. Global Generative AI Market Share by End-use (2023) 20

Figure 9. Gross volume transactions of the gig economy from 2018 to 2023 (in billion US dollars) 23

Figure 10. Percentage of people in cultural occupations in South Africa per employment type in 2024 24

Figure 11. Share of US workers working onsite, remote and hybrid from 2019-2024 29

Figure 12. Exports of all creative goods by region (US$ billion) 32

Figure 13. Global share of cultural goods exports from developing countries (2005 – 2019) ... 32

Figure 14. South African export of Cultural goods (in US Dollars) 2004-2023 33

Figure 15. Global exports of Creative Goods and Services 34

Figure 16. Average annual growth rates of Regional AVRS Exports 2005 – 2022 35

Figure 17. YouTube Searches for Nollywood movies (Worldwide) 2019 – 2024 36

Figure 18.. Exports of Personal, Cultural, and Recreational Services 37

Figure 19. Share of Personal, Cultural, and Recreational Services exports 37

Figure 20. Korean creative industries sales and exports in relation to government policy 39

Figure 21. The Ecosystems Approach of the "Design Finland" Programme 43

Figure 22. Influencer Marketing market size worldwide 56

Figure 23. Influencer Advertising Spending in Africa and South Africa 56

Figure 24. Circular Economy in the Fashion System Figure 25. Example of Event Carbon Calculator 58

Figure 26. Focus Group Discussion of Techno-Economic Trends 60

Figure 27. Focus Group Discussion of Cultural Work and Labour Market Trends 62

Figure 28. Focus Group Discussion of Cultural Consumption Trends 63

Table 1. Applications of Artificial Intelligence Technologies in the Creative Industries 21

Table 2. Percentage of people in cultural occupations in South Africa who freelance over time (2010 – 2024) 25

Table 3. Regional Shares of Audio-visual and related services exports 2018 and 2022 35

Table 4. South African Cultural Goods Exports and Imports by Region 38

Table 5. Online cultural consumption activities before and during the C19 pandemic 53

Table 6. Audience experiences of online events 55

Table 7. Techno-Economics Trends: Challenges & Opportunities 66

Table 8.Work and Labour Market Trends: Challenges & Opportunities 67

Table 9.International Cultural Trade Trends: Challenges and Opportunities 68

Table 10.Managing the Creative Economy: Challenges and Opportunities 69

Table 11.Demand Side and Cultural Consumption Trends: Challenges and Opportunities 70

Executive Summary

The creative economy is increasingly being recognised for both its intrinsic cultural values and its potential to contribute to economic growth, employment creation, and poverty reduction. The cultural and creative industries (CCIs) have been affected by important economic trends over the last 10-years internationally as well as in South Africa, particularly related to online and digital environments (and more recent developments in Artificial Intelligence), but also including new ways of managing and supporting the sector, the rise of freelance and platform work, and the increasing importance of international trade in cultural services.

The aims of this report are to (i) Identify and discuss important international economic trends for the cultural and creative industries over the last decade; (ii) Assess the importance of the identified trends in the South African CCI context, and (iii) Discuss the potential challenges and opportunities for South African CCIs in light of these trends.

A mixed-methods approach was used, combining quantitative data analysis from sources such as UNESCO, UNCTAD, and South African economic statistics, with qualitative insights from an online focus group of South African CCI stakeholders. The study also used partial equilibrium modelling, based on a Cultural and Creative Industries Satellite Account, (including a forecasting component, from 2025- 2029, to track the recovery and likely future growth of South African CCIs by domain.

The analysis identified five major international economic trends affecting the CCIs, both international and locally: **Techno-Economic Trends**, including digital platforms, NFT and Blockchain technologies, and generative AI; **Work and labour market trends**, including the "gig" economy, hybrid working, and the role of industry associations; **International trade trends**, including diversity in cultural trade, the rise in services trade as cultural products dematerialise, and South-South cultural trade; **Trends in managing the Creative Economy**, including changes in intellectual property and copyright, cultural policy, public funding for the CCIs, and cultural leadership; and **Demand side and cultural consumption trends**, including digital cultural consumption, the role of social media and user-generated content, and environmental sustainability and ethical consumption.

Most cultural sectors (domains) in South Africa showed a reasonably quick recovery from COVID-19. The most notable growth is seen in the Audio-Visual and Interactive Media domain, which significantly accelerates post-2020 – a trend that is expected to continue in the future, fuelled by productivity gains from new production and distribution methods. However, Visual Arts and Crafts, and especially Books and Press, have declined in terms of economic growth, a trend which is expected to continue in the future despite some recovery from the pandemic

This report concludes by identifying the opportunities and challenges that each of the identified trends is likely to have for the South African economy, and suggested actions that can be taken by both government and the industry itself are to capitalise on the identified trends.

These suggestions include investment in digital and internet infrastructure to capitalise on the opportunities offers by the techno-economic production and consumption trends, and the development targeted funding and training support for emerging technologies. Being able to leverage the opportunities offered by digitalisation and new technologies, like generative AI, depend on both access to funding, and skills and education on how the new technologies can

be used effectively by the CCIs. Other suggested actions include strengthening intellectual property and copyright laws to enable creatives to monetise their work more sustainably, and support for hybrid work models and findings ways of enabling freelancers to access social protections.

1 Introduction: CCI Context and the Goals of the Report

The creative economy is increasingly being recognised for both its intrinsic cultural values and its potential to contribute to economic growth, employment creation, and poverty reduction. In South Africa, the creative industries, as defined in the UNESCO Framework for Cultural Statistics (2009; Figure 1), made up nearly 3% of economic activity in 2020, despite the devastating effect of the COVID-19 pandemic on the sector in that year (SACO Mapping Study, 2022).

People employed in cultural occupations (both inside and outside cultural industries), and those working in support occupations in cultural industries, accounted for 6% of all jobs in South Africa (SACO Mapping Study, 2022). In 2020, South Africa's cultural goods exports were worth US$316 million, and were growing at a faster rate (14.6% per year) compared to all commodity exports (5.2% per year) in the pre-COVID period (SACO Mapping Study, 2022). The Creative Industry Masterplan (2022) was developed as part of the Reimagined Industrial Policy strategy of South Africa, reinforcing the importance of the CCIs for growth and development in the country.

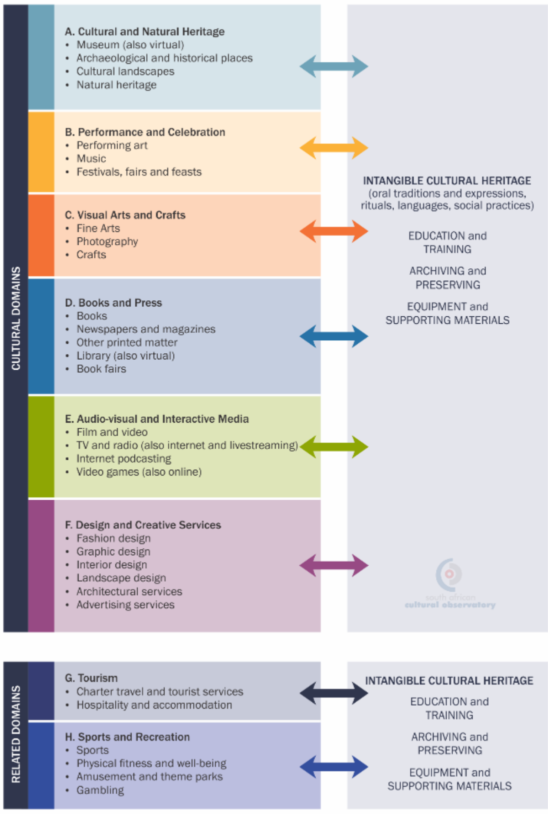

Figure 1. UNESCO Framework for Cultural Statistics (2009)

The cultural and creative industries (CCIs) have been affected by important economic trends over the last 10-years internationally as well as in South Africa, particularly related to online and digital environments (and more recent developments in Artificial Intelligence), but also including new ways of managing and supporting the sector, the rise of freelance and platform work, and the increasing importance of international trade in cultural services.

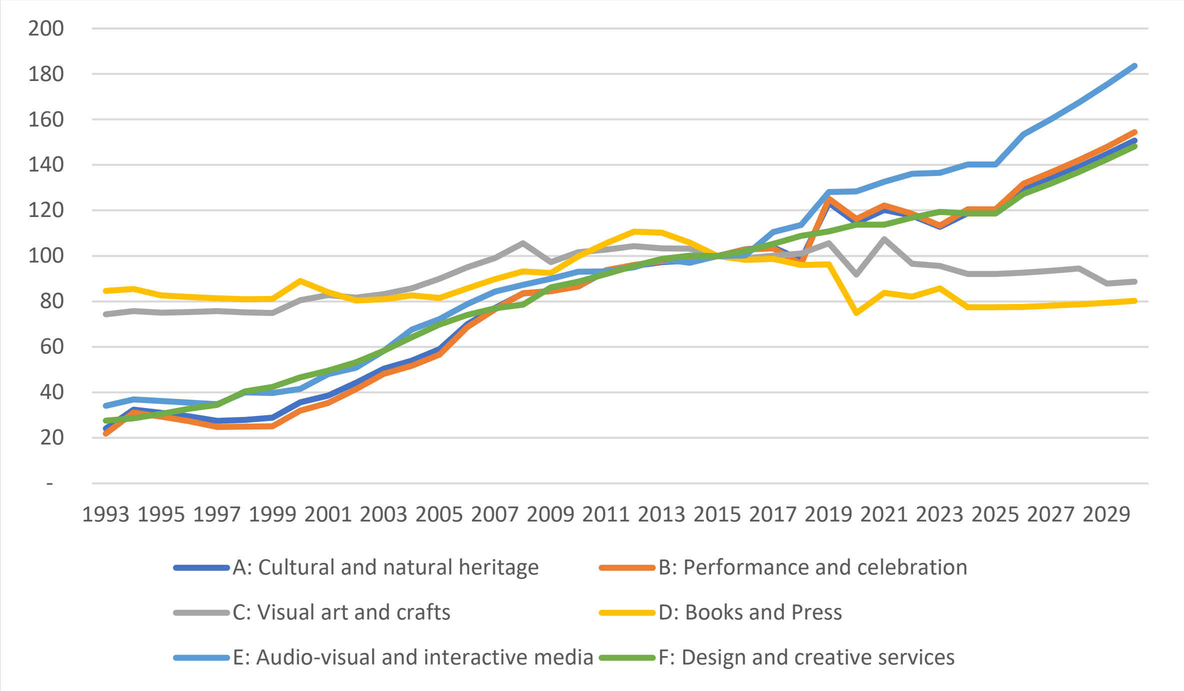

Figure 1. Index of CCI growth rates in South Africa by Domain

To get a sense of how South African CCIs have performed at Domain Level, partial equilibrium modelling, based on a Cultural and Creative Industries Satellite Account, embedded into a Social Accounting Matrix was used (also including a forecasting component, from 2025- 2029[1]). This was used to construct a growth index for each domain showing changes in their economic output over time, relative to where they were in 2015 (2015 = 100 the base year).

The most notable growth is seen in the Audio-Visual and Interactive Media domain, which significantly accelerates post-2020 – a trend that is expected to continue in the future. This surge likely reflects the increased market share of digital media and streaming services, accelerated by technological advancements and the pandemic's digital shift (further discussed in the report below). Design and Creative Services is also expected to grow fairly consistently relative to their size in 2015.

[1] Analysis based on data from national databases such as Annual Financial Statistics; Supply and Use Tables; Household Income and Expenditure Survey; Labour Market Dynamics Survey; SARB Quarterly Bulletins; sourced from Quantec.

Performance and Celebration, and Cultural and Natural Heritage are smaller domains in terms of their economic size, but both are expected to grow in the future despite an uneven recovery from the COVID-19 pandemic. Both domains demonstrated steady growth over the last decade, from an index of 98 in 2013 to 113 by 2023.

Visual Arts and Crafts, and especially Books and Press, have declined in terms of economic growth, a trend which is expected to continue in the future despite some recovery from the pandemic in 2021/22 period. Visual Arts and Crafts started at an index of 103 in 2013, declining to 96 in 2023. The decline suggests challenges in areas such as accessing markets, which is corroborated by the recently released "Visual Arts Review" commissioned by the Department of Sport, Arts and Culture (DSAC, 2024). However, the crafts sector remains an essential aspect of South African identity and provides an economic lifeline for many rural artisans, despite low earnings (Hadisi and Snowball 2024).

The Books and Press growth index declined from 110 in 2013 to 86 in 2023, a trend which is expected to continue in the future. The contraction in this sector can be mainly attributed to the global shift towards digital media, reducing the demand for print publications. However, this trend also indicates opportunities to innovate within the sector, with digital publishing offering a way to reach wider audiences, particularly in educational materials and local language content.

The main goal of this report is to identify and discuss the important international economic trends in the development of the cultural and creative industries in order to highlight potential challenges and opportunities for the South Africa cultural and creative industries, and possible areas of policy intervention.

The report aimed to achieve the following objectives:

- Identify and discuss important international economic trends for the cultural and creative industries over the last decade
- Assess the importance of the identified trends in the South African CCI context
- Discuss the potential challenges and opportunities for South African CCIs in light of these trends.

2 Research Methods and Data

The research takes a mixed methods approach. The central premise of the mixed methods approach is that the combination of quantitative and qualitative approaches provides a better understanding of research questions relating to complex social phenomena than either approach alone (Creswell and Plano Clark, 2011).

To identify and discuss important international economic trends for the CCIs, secondary data sources were used, such as academic articles, industry reports, and reports from international development agencies with a focus on the CCIs (UNCTAD; UNESCO, African Development Bank etc.).

South African macroeconomic data and policy were analysed to determine the potential challenges and opportunities for South African CCIs. Data was obtained from official sources (Reserve Bank, National Financial Statistics, World Trade Organisation etc.), as well as previous

SACO reports, reports commissioned by government departments, like the DTIC, and policy documents.

Finally, an online focus group of practitioners, policy-makers and researchers in the Cultural and Creative Industries was convened in November 2024 (Ethical Clearance obtained through Rhodes University; Ethics Approval Number: 2024-8140-9115).

The research team presented some of the trends identified by the research participants and facilitated a discussion of the importance of the trends in the South African context, and to add further insights on the challenges and opportunities they represent.

The international review identified a number of important CCI economic trends, which were grouped into five main areas:

- Techno-Economic Trends, including digital platforms, NFT and Blockchain technologies, and generative AI
- Work and labour markets, including the "gig" economy, hybrid working, and the role of industry associations
- International trade, including diversity in cultural trade, the rise in services trade as cultural products dematerialise, and South-South cultural trade
- Managing the Creative Economy, including changes in intellectual property and copyright, cultural policy, public funding for the CCIs, and cultural leadership
- Demand side and cultural consumption trends, including digital cultural consumption, the role of social media and user-generated content, and environmental sustainability and ethical consumption.

The rest of the report is structured around these five main trends, after which the focus group discussion results are presented. The report concludes with a summary of the challenges and opportunities that the identified trends present for the CCIs in South Africa.

3 Techno-Economic Trends

3.1 Digital Platforms

Digital platforms have implications for many parts of the CCIs in terms of potentially offering a more accessible way of distributing content and reaching audiences, what Steedman et al. (2023) call "imaginaries of entrepreneurship." Indeed, digital platforms, like Netflix, Spotify, YouTube and Amazon can offer democratisation of marketplaces that connect creators of both digital creative work (film and television, music, fashion, photography and craft) with audiences (Black, 2019; Simon 2021). For African creative producers, platforms can be seen as a way to expand their reach, not only within their home country, but also internationally through the diaspora. Even in the global north, social media platforms like Instagram have been used to promote small craft businesses (Black, 2019), and many African fashion designers use their own websites and platforms to market and sell their goods (Gatawa and Snowball 2024).

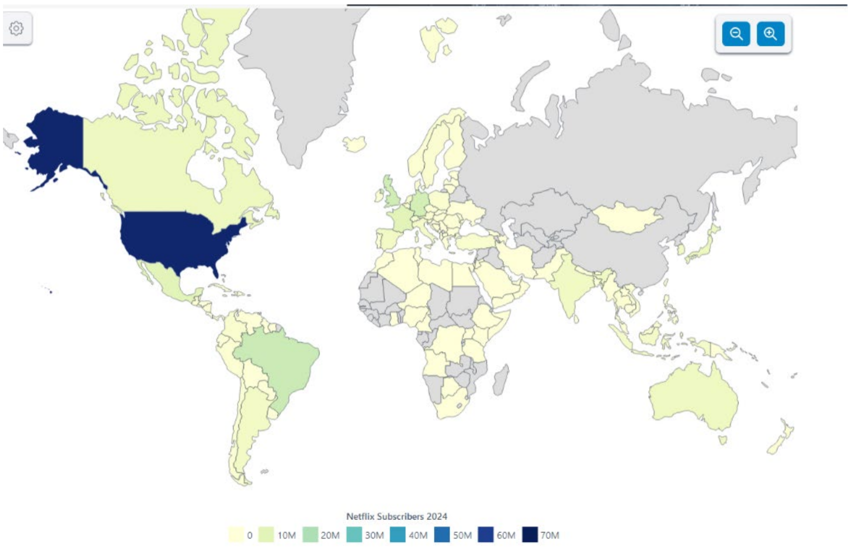

Figure 2. Netflix subscribers by country 2024

(Source: World Population Survey, 2024)

In 2013, Netflix had about 35 million subscribers worldwide, increasing to 125 million in 2018, and then boosted by the COVID-19 pandemic, increased to 240 million at present, covering 190 countries (World Population Survey, 2024[2]). As expected, 2024 data shows that Netflix subscribers are most prevalent in higher income countries, but their presence is also expanding into Africa and South America. Mexico, for example, has 10 million subscribers, South Africa has 100 000, Nigeria has 25 000 and DR Congo has 10 000. The number of YouTube users (regardless of subscription) increased from 1.1 billion in 2014 to 2.7 billion in 2023. Paying YouTube Premium and YouTube Music subscribers increased from 1.5 million in 2015 to 100 million in 2024[3].

The business models of the film and television sector in African countries has been particularly affected by streaming platforms. Unlike in the global north, most African film makers used the "direct to video" (DTV) model, where content was sold on DVDs as soon as it was produced, often in informal markets (as compared to the cinema release, followed by video model used in the global south). Streaming platforms have greatly reduced this business model's effectiveness. One film producer in Ghana reported previously making 20 films a year, each of which sold 200 000 copies on DVD, and is now down to producing 2 films a year, each of which sell 15 000 copies on DVD (Steedman et al, 2023).

Nevertheless, many African creatives still see the platforms as offering potentially lucrative future markets, given their reach and power. Indeed, the platforms themselves have started to

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[2] https://worldpopulationreview.com/country-rankings/netflix-users-by-country

[3] https://www.businessofapps.com/data/youtube-statistics/

recognise the importance of African (and other developing country) markets, increasingly commissioning local works. Larger platforms are also seeking to partner with local streaming services as a way of penetrating developing markets. For example, in 2020, Disney+ bought the Indian platform Hotstar. The Indian streaming market is expected to be one of the fastest growing in the next five years, and currently has 58 platforms and 100 million paid subscribers (PWC, 2024[4]).

Music streaming platforms are also growing exponentially, with an increase in revenue from US$0.1 billion in 2005 to US$19.3 billion in 2003 (Statista, 2024[5]). It is likely that the global north will remain the biggest streaming markets in the next few years, but growth is also expected in developing countries (Brazil, India, China, Middle East and North Africa).

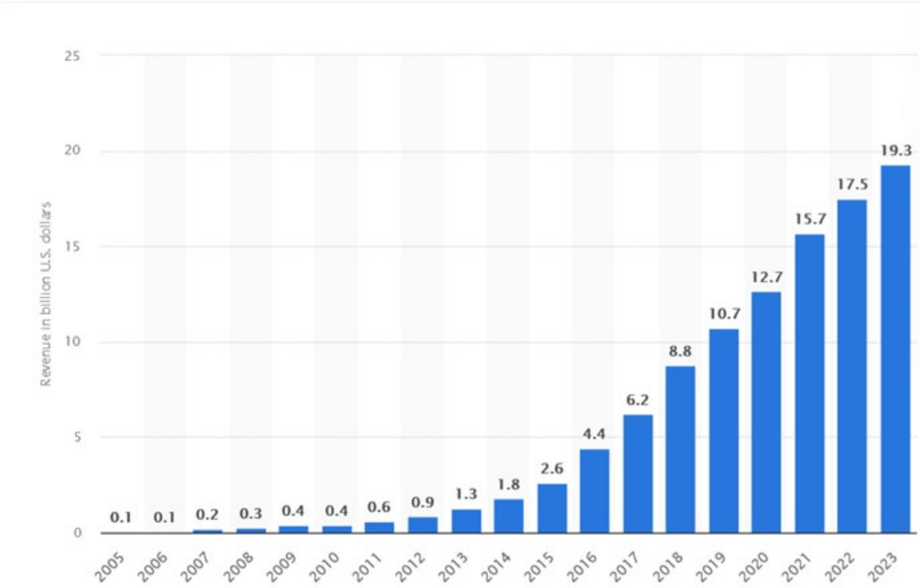

Figure 3. Global music streaming revenue 2005 – 2023

(Source: Statista, 2024)

Despite these great potential benefits, creatives have found platform distribution difficult to monetise (that is, to convert visibility and downloads into actual earnings), and some have significant barriers to entry in terms of the kinds of content and the quality required. However, platforms like Netflix are still seen as potentially beneficial because of their gatekeeping function. Thus, being affiliated with such a platform is seen by some African creatives as a career-boosting event ("consecrating function") even if financial returns are initially not large (Steedman et al. 2023).

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[4] https://www.pwc.com/gx/en/issues/business-model-reinvention/outlook/insights-and-perspectives.html

[5] https://www.statista.com/statistics/587216/music-streaming-revenue/

To build transparency, Spotify releases an annual report on its music streaming revenues (Loud and Clear, 2024[6]). 2023 was the first year that the catalogue of "DIY artists" and artists signed to independent record labels earned nearly half of all revenue (US$4.5 billion) generated on the platform, and 80% of artists who generated US$1 million or more did not have a Top 50 song on the platform, which does point to increasing opportunities for a wider variety of artists. The report showed that South Africa is still the largest market in Sub-Saharan Africa, with an annual growth rate of nearly 20%, and 2023 revenue of R256 million.

Despite the growth and potential of streaming platforms, they do still present some challenges for use by African creatives. The first of these is the "digital divide" – internet access in Africa is less widespread and more expensive than in many other places, which limits the ability of consumers to access platform content. Access to broadband internet in Africa rose from 26 percent in 2019 to 36 percent in 2022 (World Bank, 2023[7]), showing steady growth of internet users in Africa from 180.7 million in 2014 to 728.6 million in 2024. Yet, Africa still has some of the most expensive mobile data in the world, with countries like Zimbabwe (the most expensive in Africa, having an average price for one gigabyte of US$43.75) and South Sudan and the Central African Republic being in the top 10 countries worldwide for highest prices (Statista, 2024[8]).

Secondly, for African platforms themselves, finding a sustainable business model can be difficult. Iroko.tv was the largest distributor of Nollywood content, and was hailed as a ground-breaking African platform. At its height, Iroko not only bought the rights to existing content, but also commissioned more than 500 films to keep its catalogue updated and attractive to subscribers, with an average spending of between US$10,400 and US$18,200 per production (Simon, 2021). However, despite attempts to adapt to the constraints of the African market such as by charging African subscribers less than international consumers, switching to easier payment methods, and switching to a data-saving mobile application, in 2023 it shut down (Steedman et al., 2023; TechInAfrica, 2023[9]).

In South Africa, MultiChoice is the largest streaming service, offering pay-tv channels as well as Video on Demand (VOD) via ShowMax and DSTVStream. However, despite these changes, it has recently lost nearly half a million subscribers in the first half of 2024, and is being bought by Canal+, a French pay-tv company, which is also increasing its stake in a Mauritian pay-tv company to 25% (MoneyWeb, 2024[10]). The challenge is also evident in other domains: A survey of 60 000 literary authors in the UK in 2022, found that median earnings for primary occupation authors (those who earned at least 50% of their income from writing) fell 38% between 2018 and 2022, which the report attributes primarily to shift to "the digital environment" in the publishing sector (REATe Centre, 2022).

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[6] https://newsroom.spotify.com/2024-03-19/loud-clear-music-streaming-royalty-data-artist-payments/

[7] https://www.unesco.org/en/articles/bridging-digital-divides

[8] https://www.statista.com/forecasts/1146636/internet-users-in-africa

[9] https://www.techinafrica.com/iroko-tv-the-pioneering-african-streaming-service-shuts-down/

[10] https://www.moneyweb.co.za/news/companies-and-deals/as-subscribers-decline-multichoice-begins-disrupting-itself/

For those who do get their creative work onto platforms, success is not guaranteed. Streaming platforms are interested in scalability and breaking into new markets, determining through algorithms what kind of music "sells". Artists whose work is not deemed to be "Spotify-friendly" are not promoted to the end consumer through recommendation systems, thus reducing their visibility and consequently, downloads and earnings (Hodgson 2021). Because the market structure for platforms is oligopolistic (the industry is dominated by a small number of large firms), non-price competition and other strategies, such as offering recommendations and reviews, are widely used and give platforms enormous power (Towse, 2024). Even on smaller platforms with an artist-centred ethos, like Bandcamp, research has found evidence of the "long-tail" pattern of income distribution – that is, a small percentage of "superstar" artists earn the majority of the income, while the majority take home much smaller shares (Pilati, Houssard, and Sacco 2024).

These patterns are playing out in European markets as well, where the complex relationships between music streaming services, social media and recommendation algorithms (that organise and rank creative work) is changing the industry from one based on ownership to access-based models (Mazziotti and Ranaivoson 2024).

> "On the one hand, platforms have effectively enabled new forms of music production and enabled home-made creations that empower amateur, early career, or disenfranchised categories of authors to gain online exposure. On the other hand, these algorithm dominated businesses seem to have induced a significant impoverishment of creators, especially those of niche or marginal repertoires" (Mazziotti and Ranaivoson, 2024: 253).

Over the last 10 years platforms have resulted in significant changes to the business models of creative industries, especially in areas like the audio-visual and interactive media domain, where content has digitised (or de-materialised). This has brought with it both potential benefits for African creatives, including using a wider range of business models (Li 2020) as well as challenges around monetisation, copyright and intellectual property, and increased competition.

3.2 NFTs and Blockchain

Non-fungible tokens (NFTs) and smart contracts use the same technology as cryptocurrencies like Bitcoin to securely assign property rights to creative content. One of the most pressing issues in the creative industries is the high level of transactions costs associated with doing business. Transactions costs occur when creatives have to use intermediaries (such as galleries, record companies or publishers) to make the connections between buyers and sellers. As intermediaries become more powerful, their distribution of the profits from creative outputs may favour creatives less and less. For example, in the US, artists captured 12% of music revenues in 2017, with the majority of revenue going to intermediaries (Malik et al. 2023).

While some intermediaries play valuable roles in developing the and marketing creative content, creatives have called for more control of pricing, the choice of marketing platforms, and the sharing of revenue. Part of the problem is the lack of transparency about information such as usage data (often known only to the end distributor) and the lack of standardization of royalties. Artists also face long waits to receive payments (9 to 12 months), and do not have the power to negotiate with large intermediary companies (Malik et al., 2022).

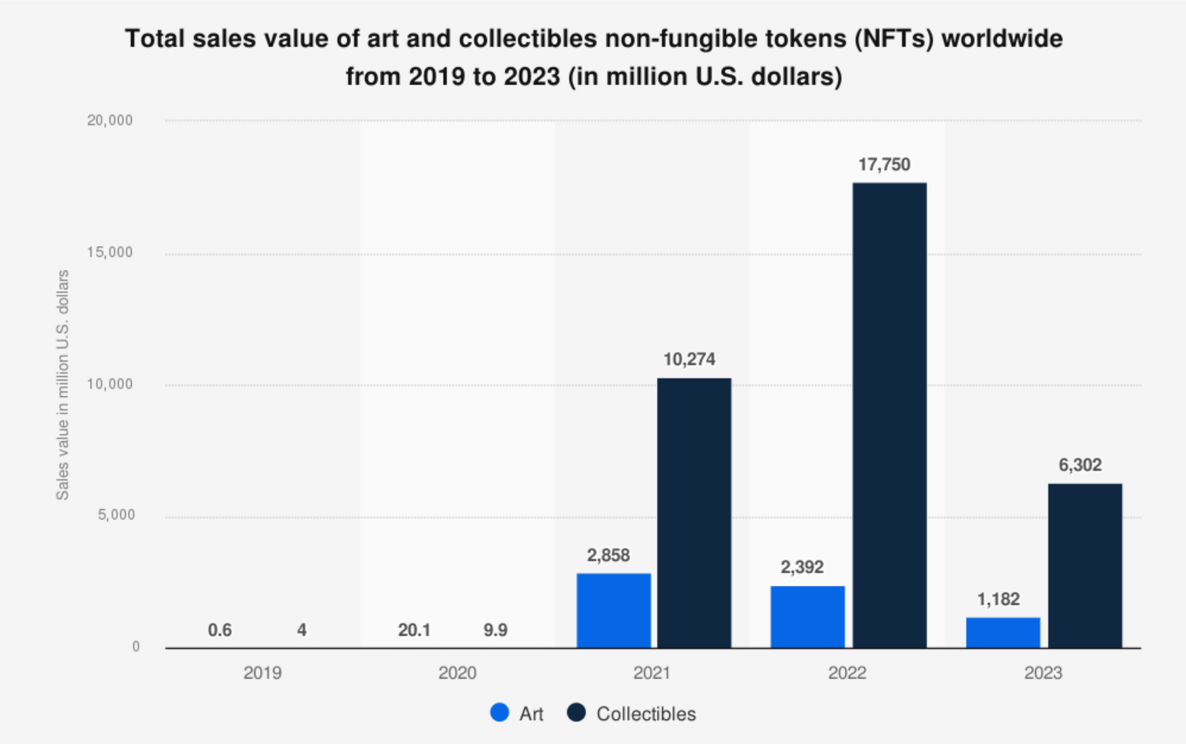

Figure 4. Total sales value of art and collectables NFTs worldwide 2019 – 2023

(Source: Statista, 2024)

An NFT has a unique identifier and its ownership is linked to a unique address on the blockchain. The Blockchain technology itself ensures that no single user can change the record. In the creative industries, NFTs have been most widely used to determine asset ownership of digital art and creative content. Smart Contracts (stored on the blockchain) put in place agreed rules about a transaction that will be executed as soon as the conditions are met (for example, about the agreed royalties that will be paid to musicians as soon as their song is downloaded), and so reduce the need for intermediaries, such as music rights organisations, and give artists more control over the usage data and payment for their work. Since the costs are relatively low, these technologies also enable situations where a large number of small payments are made (called micro transactions), such as in online video games.

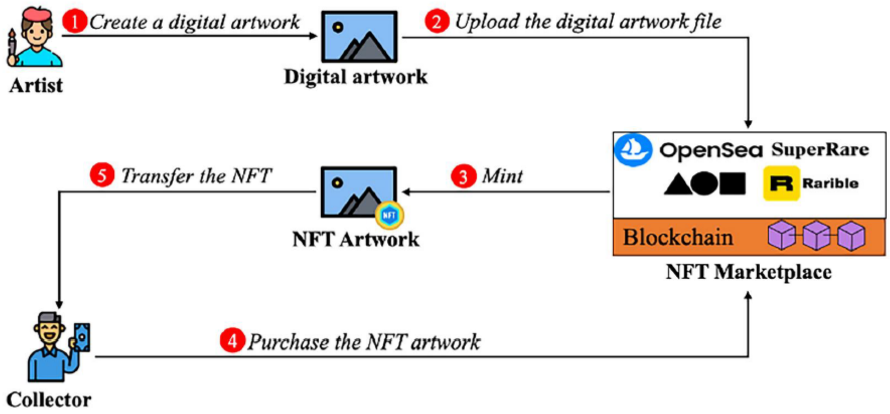

Figure 5. How NFTs can be used to facilitate sale of digital artworks

(Source: Guan et al. 2024)

NFTs can also be used to track the ownership and ownership history of digital and physical artworks, thus helping buyers to establish the authenticity of the work, and assert their ownership. A digital collage by an American artist, Beeple, entitled *Everydays: The first 5000 days*, sold for US$69.3 million in 2021, which was the third-highest auction price for a living artist's work ever achieved. Global NFT sales of art and collectables was over US$20 billion in 2021, but fell dramatically in 2023 to US$7.5 billion (Statista, 2024[11]). This demonstrates one of the challenges of the NFT market that make it less attractive for creatives – that it has significant price volatility (Malik et al., 2022).

While digital artworks are not new, the use of NFTs and blockchain technology suddenly allowed them to be "owned" in ways that were not possible before. As in the case of physical artworks, images of digital artworks are available online, but the original is owned by only the person who bought the NFT (Delaplaine, 2021). As shown in the figure, the artist creates the artwork, which is then uploaded to a blockchain-based NFT marketplace (e.g. OpenSea and SuperRare). These platforms allow the recording of NFT minting and the transfer of ownership. The artist provides information about the NFT, including its name, description and attributes. When the information is verified, the platform mints the NFT on the blockchain. When the artwork is sold, the NFT is recorded as transferred to the buyer, who now owns it. Smart Contracts can also be integrated into this process (Guan et al., 2024).

While the NFT art market is still in the early stages in Africa, there has been some success. The NFTs of Fhatuwani Mukheli, a South African digital artist, have sold for up to US$10 000 each. He is also the co-founder of Out of Africa NFT collection, which hosts works from 39 artists based in Southern Africa. This is the first curated NFT collection that generates NFTs for both digital and physical artworks. Buyers receive both the NFT for the digital artwork and the right to take collection of the physical artwork (Invictus Capital, 2022[12]).

[11] https://www.statista.com/statistics/1299636/sales-value-art-and-collectibles-nfts-worldwide/

[12] https://cdn.invictuscapital.com/whitepapers/The_NFT_Lab_The_out_of_africa_collection-litepaper.pdf

NFTs can be used in a number of ways, including raising money to protect cultural heritage. In 2022, an NFT of Nelson Mandela's arrest warrant sold for R1.9 million. The physical warrant is held at the Liliesleaf Farm Museum, which was in urgent need of funds to curate its collection of anti-Apartheid struggle history. What was sold was a high-quality scan of the original warrant – the first heritage NFT created in South Africa. The unique digital heritage object will be owned by the anonymous buyer, who also has the right to sell it in the future, with the right to 5% of any subsequent sales as well, and the right to view the original (Daily Maverick, 2022[13])

NFTs do still have some challenges, however. Some parts of the system can be illegally accessed or hacked, and NFTs can be lost if the specific marketplace that hosts the NFTs fails. There is currently no way to ensure digital artworks, and Smart Contracts have yet to be tested in court. As pointed out, intermediaries do play valuable roles in terms of "curating content" for consumers, and given the complexity of minting NFTs and Smart Contracts, some creatives may still prefer to use intermediaries.

NTFs and blockchain technologies thus have the potential to revolutionize the way digital art and creative content are bought, sold, and authenticated. NFTs can also provide new revenue streams for artists and creators without the necessity of using intermediaries, and have potential applications in fine art, heritage, and music.

3.3 Generative Artificial Intelligence (AI)

AI technologies enable machines to perform task that usually need some degree of human-like intelligence (Anatrasirichai and Bull, 2022). Since creative tasks involve more innovation and different combinations of skillsets than other work, the sector was identified early on as one of the least vulnerable to automation. Generative AI has caused some concern in the creative industries, though, because of its ability to aggregate vast amounts of data (including video, written text, and images) to generate new works.

There are highly publicised instances of cases where AI is seen as a threat to creative industries workers. For example, Jason Allen winning first place at the Colorado State Fare Fine Arts Competition in 2022 with an AI generated image,[14] the release of a new song by the Beatles in 2023, that used AI to "extract" the vocals of John Lennon from a demo cassette,[15] and in 2024, members of the US actors' union went on strike for 118 days to protest the use of AI to replace actors and demanding that this would not be done without their consent[16].

[13] https://www.dailymaverick.co.za/article/2022-03-28-liliesleaf-auctions-an-nft-of-nelson-mandelas-arrest-warrant-for-millions/

[14] https://edition.cnn.com/2022/09/03/tech/ai-art-fair-winner-controversy/index.html

[15] https://www.theguardian.com/music/2023/jun/23/paul-mccartney-says-theres-nothing-artificial-in-new-beatles-song-made-using-ai

[16] https://www.wired.com/story/hollywood-actors-strike-ends-ai-streaming/

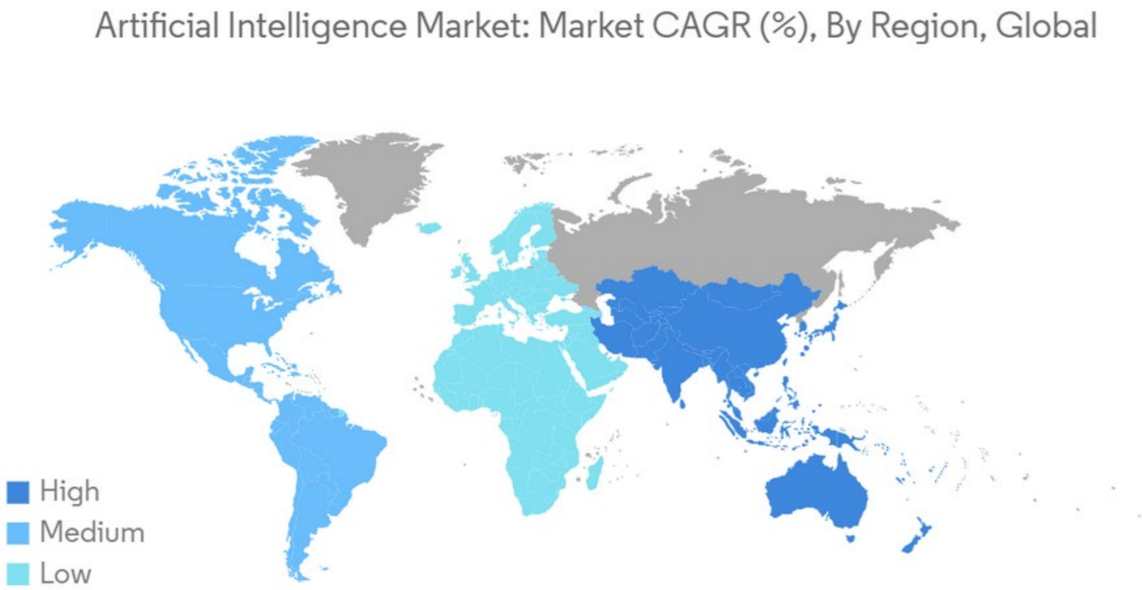

Figure 6. Artificial Intelligence Market: Market Compound Annual Growth Rate (%) by region

However, as Anatrasirichai and Bull (2022) point out, many creative processes start with detailed research and require technical processes as well as creative ones. They report on a survey of creative artists in the US, UK, Germany and Japan, 75% of whom said that they would consider using AI tools "as assistants" in non-creative tasks, such as searching for images and editing. Content creation (which uses human and AI collaboration to generate new works) is thus only one possible application of AI in the creative industries.

There is also no doubt that the AI market (driven by companies and individuals using AI) is likely to grow quickly. According to Grand View Research (2023[17]) Media and Entertainment made up the largest revenue share of the global generative AI market in 2023 - 22.6% of $13.0 billion - possibly due to increased use of AI to enhance and personalise creative content and the creation of improved advertising campaigns. Gaming also makes up a large part of the revenue in the global market for generative AI.

[17] https://www.grandviewresearch.com/industry-analysis/generative-ai-market-report

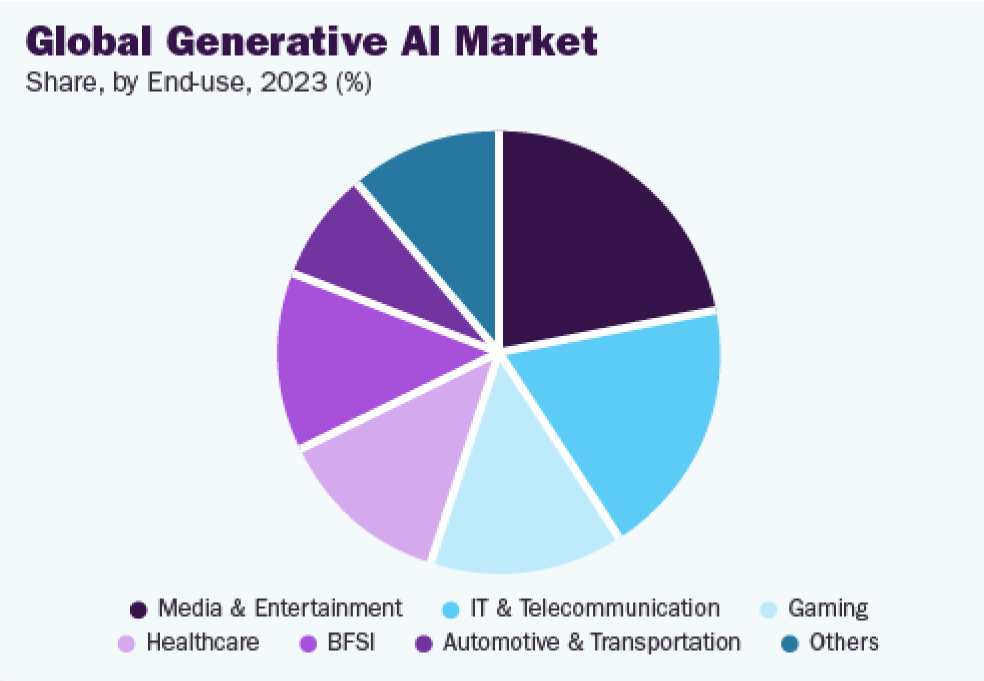

Figure 7. Global Generative AI Market Share by End-use (2023)

Business analysts report an expected compound annual growth rate (CAGR) of the global generative AI market of 31% between 2019 (when the technology first appeared for general use) and 2029 (Mordor Intelligence, 2024[18]). While growth in the use of AI in the African market is not expected to be as fast, there is still potential for its application. *The State of AI in Africa* report (2023) sees potential for a "democratised shift" in the creative industries driven by AI, where the usual barriers to entry can be lifted.

> "Creative industries were long believed to be exclusive clubs. However, with the advent of AI there has been increased participation of individuals in creative fields with AI offering essential support in artistic visions" (Steedman et al. 2023: 20).

Safavi and Ghazinoory (2024) agree that Industry 4.0, including artificial intelligence, has the potential to impact across the value chain of the creative industries including ideation, production, distribution and consumption. The table below lists some of the potential application for AI technologies in the creative industries.

[18] https://www.mordorintelligence.com/industry-reports/global-artificial-intelligence-market

Table 1. Applications of Artificial Intelligence Technologies in the Creative Industries

Value chain stage	Application examples
Ideation / Content Creation	Generate new ideas and story-lines
	Gaming: support design & interactivity
	Journalism: Text from sound and images; first drafts
	Music generation & Sound design
	Image generation: Art, design, maps
	Animation: Motion prediction, lip synchronisation, lighting
	Augmented & Virtual Reality: entertainment, education, training, collaboration
Information analysis / Production	Organising and searching archives
	Captions and content description
	Reverse image search & Object recognition
	Content enhancement, colorization, upscaling resolution, deblurring, denoising
	Restoration and Inpainting
	Visual special effects (VFX)
	3D reconstruction & rendering
Distribution & Consumption	Matching content to audiences
	Recommendation services
	Intelligent assistants (Chatbots)
	Managing IP and Smart Contracts

(Sources: Anantrasirichai and Bull 2022; Safavi and Ghazinoory 2024)

However, there are also challenges associated with the adoption of AI in creative industries, as some of the earlier examples show. One of the most pressing is how AI will affect creative artists, and the rights and abilities of creatives to assert property rights and monetise their content. Issues of piracy and originality will need careful consideration and adapted policy and law (Anantrasirichai and Bull 2022; Safavi and Ghazinoory 2024).

Another issue is that AI use, which has the potential to increase productivity and output quality in the creative industries, may also amplify the digital divide between those who have access to and can apply AI, and those who cannot. This may depend on technical factors, such as access to the internet and human capital, but may also depend on organisation factors, such as bridging the gap between creative and technical teams and managing the psychological impact of automation on creative workers' job security and job satisfaction (Safavi and Ghazinoory 2024).

There are also ethical issues and biases to be considered. These include manipulations of audio-visual content for fun or with malicious intent, referred to as "Deepfakes". Such content, now much easier to create, could be used to spread fake news or falsely attribute words and actions to people. Similarly, if the data used for AI training is biased towards a particular view or group, the content will also be biased (Hofmann et al. 2024).

Nevertheless, the wide range of applications for AI in the creative industries is likely to make this one of the most important industry trends, across all parts of the value chain, in the foreseeable future.

4 Work and Labour Market Trends

4.1 The Gig Economy and Freelance Work

The gig economy refers to a labour market characterised by short-term or contract work instead of a permanent job. Gig work is generally done by freelancers. A freelance worker is defined as a self-employed individual or own account worker without any employees. Freelancers perform tasks or offer their services to clients on a project-by-project or short-term contract basis rather than being tied to a single employer. Freelance workers thus move from one job or client to another. In other words, they move from gig to gig. Freelancers typically work independently and have the flexibility and autonomy to choose their projects, clients, and work hours. Depending on the nature of the work and the agreement with the client, a freelancer may be paid per project, per hour, or on retainer. Despite the benefits, work in the gig economy is precarious as traditional workplace benefits like job security, health and unemployment insurance, or retirement plans do not apply.

Examples of sectors operating under the gig economy include transportation and delivery services; skilled professional services such as IT, language services, business consulting; and creative industries work. Gig work in the CCIs includes services like graphic design, content writing, photography and videography, music and audio production, or illustration and animation. Gig work is often facilitated through online platforms like Uber and Deliveroo for transport and food delivery, and Upwork and Fiverr for more professional services.

The gig economy has been growing significantly in recent years and is projected to continue its growth trajectory (Statista, 2024[19]). In the US, 64 million Americans (38% of the workforce) freelanced in 2023, contributing $1.27 trillion to the U.S. economy in annual earnings (Upwork, 2024[20]). Globally, the online gig economy workforce is much larger than previously thought, with an estimated 154 million to 435 million people, accounting for up to 12% of the global labour

[19] https://www.statista.com/statistics/1034564/gig-economy-projected-gross-volume/

[20] https://www.upwork.com/resources/gig-economy-statistics

force (The World Bank, 2023[21]). It has further been estimated that the gig economy generated $3.8 trillion in revenue in 2022 (Staffing Industry Analysts, 2023[22]). The key drivers of the expansion of the gig economy include technological advancements in communication tools and remote work technology that allows people to work independently; digital platforms making it easier for freelancers to connect with clients and customers internationally; shifting work preferences with people placing greater value on flexibility, autonomy and work-life balance; and economic considerations for employers aiming to reduce costs (Kalleberg, 2012; Wood et al., 2018).

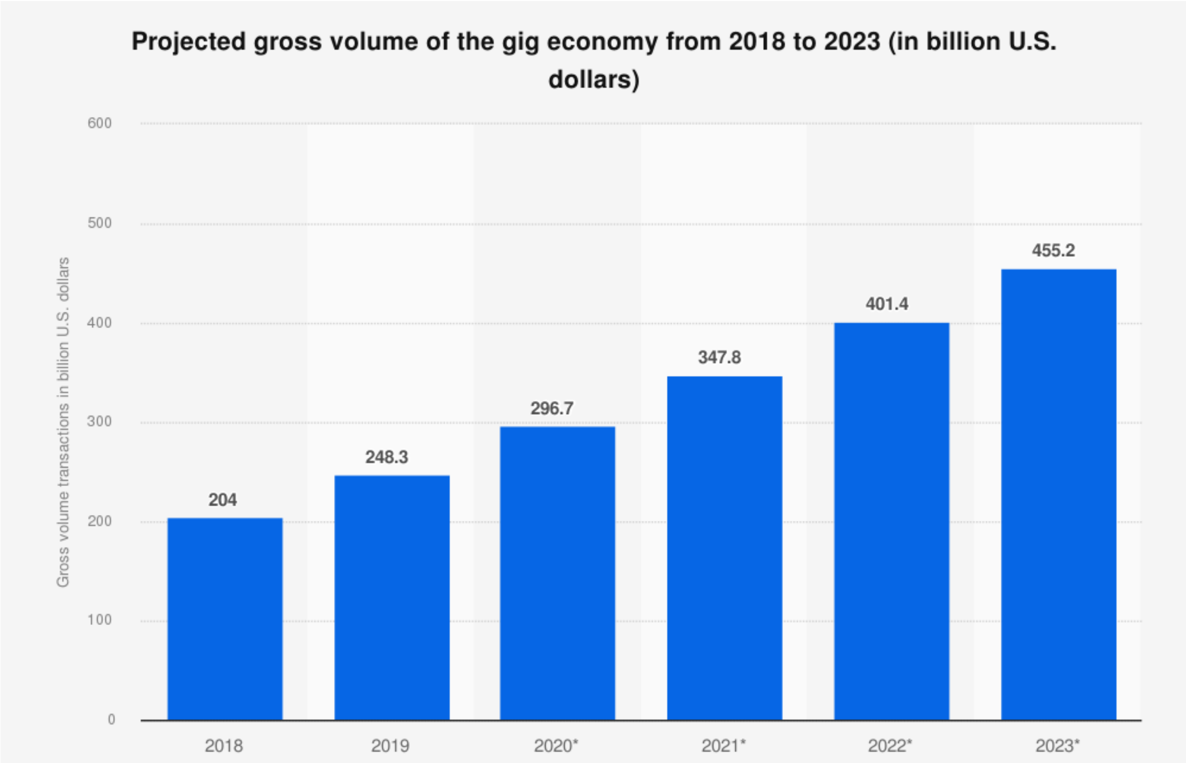

Figure 8. Gross volume transactions of the gig economy from 2018 to 2023 (in billion US dollars)

(Source: Statista, 2024)

The CCIs are particularly well-suited to the gig economy with large proportions of freelance workers. Using data from the Current Population Survey in the US between 2003 and 2015, Woronkowicz and Noonan (2019) find that, relative to other professional occupations, creatives tend to freelance at much higher rates. The same is true for South Africa, where just over a third (36.2%) of all cultural occupations in 2024 were classified as 'own account workers' or freelancers (see Figure 10). This is opposed to non-cultural occupations, where about 10% of workers are freelance (SACO, 2022). However, working for someone else for pay (59.4%) remains the most common form of employment in the South African creative economy. This

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21 https://www.worldbank.org/en/topic/jobsanddevelopment/publication/online-gig-work-enabled-by-digital-platforms

22 https://www.staffingindustry.com/news/global-daily-news/global-gig-economy-revenue-reaches-38-trillion

may reflect the challenges of freelance work (discussed below). Relatively few people in cultural occupations are classified as employers (4.4%). Moreover, in many countries in the global south, large proportions of gig economy workers, including creative freelancers are informal (Dinardi, 2019). In South Africa, 46.3% of people in cultural occupations worked in the informal economy as compared to 29.8% of people in non-cultural occupations (SACO, 2022). However, informal creative work should not be undervalued or dismissed. The ingenuity of informal creative workers is highlighted in Brazil (Dinardi, 2019) and Ghana (Langevang et al., 2022), where creative problem-solving skills, experimentation, reinvention, 'hustling' and improvisation are key to success. These skillsets that relate to innovation are particularly valued in formal creative economies.

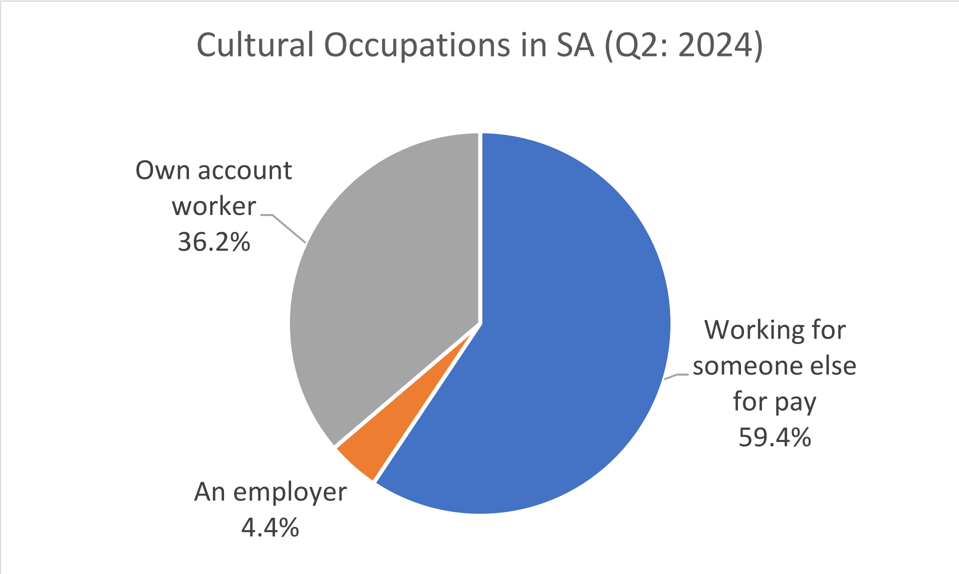

Figure 9. Percentage of people in cultural occupations in South Africa per employment type in 2024

(Quarterly Labour Force Survey, Authors' Own Analysis)

A number of reasons have been put forward to explain the high proportion of freelance labour in the CCIs from both the demand (firms/clients) and supply (individual workers) sides. On the demand side, production models are project-based, undertaken by small, medium, and micro enterprises (SMMEs) that have only a small permanent workforce. Firms thus need to be able to assemble diverse, skilled teams of people for short periods of time to work on particular projects or specialist tasks and can swell or shrink their workforce as necessary, thereby lowering costs while being able to deliver on a range of projects with specific requirements (Caves, 2000; Eikhof and Warhurst, 2013). The project-based production model has consequences for work and employment in the sector as the functional need for flexibility means that work tends to be on a short-term contract basis. On the supply side, flexibility, greater artistic control, self-autonomy and 'doing what you love' or pursuing your passion are attractive prospects for undertaking freelance labour (Bille et al., 2017; Luckman, 2018).

Despite these advantages of freelancing to the individual, work in the gig economy is precarious. Due to the project-based production model and the consequent temporary contract work, "employment instability is thus endemic in these industries" (Eikhof and Warhurst, 2013: 498). Freelancers in the CCIs (and gig workers more generally) often face situations of volatile income, uncertain job and career prospects, periods of unemployment and underemployment, little job protection, and limited access to social welfare (de Peuter, 2014). However, creatives tend to find their work highly satisfying (Bille et al., 2013) and are often willing to trade-off the more negative aspects of creative work for the benefits of working as a freelancer in the sector (Umney and Kretsos, 2015). Freelancing is thus a “complicated version of freedom” as it comes with positive and negative aspects in that a freelance creative worker may be able to follow their passion while also struggling to make ends meet (Hesmondhalgh and Baker, 2010: 13). Rather than being either entirely good or bad, creative work in the gig economy tends to be complex, with at times contradictory combinations of good and bad quality work (Hesmondhalgh and Zoellner, 2013).

Following the global trend of increases in freelancer numbers, the percentage of people in cultural occupations in South Africa who are classified as freelance has been increasing over time from 30.7% in 2010 to 36.2% in 2024. It is likely that this trend will continue as advances in technology and lifestyle considerations make freelancing an appealing choice for many. Platforms like Fiverr and Upwork have also made creative freelance work more accessible to people in the Global South (including South Africa) by connecting workers with international clients (Wood et al., 2019). With high unemployment rates in South Africa (32.1% in Q3 of 2024[23]) and many other Global South countries, online freelancing platforms could provide opportunities for many to earn an income. Moreover, with favourable Rand exchange rates for clients in Global North countries, South African freelancers may benefit from higher demand as they could do the work at comparatively lower rates than freelancers in the clients’ home country. South African freelancers would also benefit from earning in foreign currencies like US dollars, Euros or British Pounds.

Table 2. Percentage of people in cultural occupations in South Africa who freelance over time (2010 – 2024)

Percentage of People in Cultural Occupations in SA Who are Freelance
2010: 30.7%
2015: 34.5%
2024: 36.2%

(Quarterly Labour Force Surverys; Authors’ Own Analysis)

Due to its flexibility, the gig economy can provide opportunities for people who would otherwise find full-time work difficult (ILO, 2016). This may include people with caring responsibilities, health concerns and people who wish to combine work with furthering their education or training (ILO, 2016). This greater flexibility has also been found to be attractive to women who have primary caregiver roles for children and families (Allen and Curington, 2014).

[23] https://www.gov.za/news/media-statements/statistics-south-africa-official-unemployment-rate-third-quarter-2024-12-nov

Despite the benefits of online platforms, they are not without fault. Since online freelance work operates in an internationally competitive market with an oversupply of workers, it can be difficult for people to find paid work (Wood et al., 2019). Furthermore, freelancers may face downward pressure on wage rates and difficult working conditions, as clients can easily replace one worker with another who may be willing to do the work for a cheaper fee or deliver it in a shorter timeframe (Wood et al., 2019). With rating systems in use on platforms, workers may feel pressure to acquire and/or maintain a good rating, so they may charge lower fees or work under stringent conditions (Wood et al., 2019). However, once a worker has a good rating and a portfolio of previous work, they have more power to negotiate favourably with clients (Wood et al., 2019).

4.2 Industry Associations and Support Networks

Freelancers tend to have less union representation than workers in permanent employment positions (Kalleburg et al., 2000). A lack of representation impacts the balance of power in the workplace and heightens the threat of precarity (Vosko, 2006). However, confronting the challenges of creative work through collective action is difficult. Given how individualistic creative work can be, a feeling has emerged amongst creative workers that collective action is unnecessary and/or undesirable (Banks and Hesmondhalgh, 2009; Hesmondhalgh and Baker, 2010). Moreover, freelancers are rarely in the same space for long, as they move from one gig to another and are often reluctant to agitate as job security relies on reputations and networks, while an oversupply of creative workers makes individuals replaceable (Hesmondhalgh and Baker, 2010; de Peuter, 2014). Creating the conditions for organizing collective action is thus challenging in itself. Despite these challenges, formal collective action has recently experienced a resurgence, especially in response to COVID-19, which highlighted its value to freelance workers (Skaggs and Aparicio, 2023).

The creative economy was particularly hard-hit by the COVID-19 pandemic. It was estimated that global losses of production (value added) in 2020 from the CCIs was $750 billion, with 10 million jobs lost (UNESCO, 2022[24]). Macroeconomic modelling estimated that the direct contribution of the creative economy to South Africa's GDP fell by 50% in 2020 and 44% in 2021 from its 2019 level (SACO, 2021). Freelancers and informal creative workers were particularly vulnerable to the effects of the COVID-19 pandemic. Between the fourth quarters of 2019 and 2020, 85 000 cultural jobs were lost in South Africa (SACO, 2022). The number of creative freelancers fell from 120 400 to 81 900 between the first and second quarters of 2020 – a decrease of 32%, compared to a decrease of 22% for cultural employees on a permanent contract (SACO, 2022).

In part, the negative effects of the pandemic on freelance were so severe because of the nature of freelance work itself (Comunian and England, 2020; Joffe, 2021). Freelancers tend to lack access to adequate representation, social security, and safety nets as they are responsible for their own health insurance, pension funds, and savings to fall back on during periods of unemployment rather than welfare (Comunian and England, 2020). This leaves them vulnerable to shocks. Though the precarity associated with creative work and freelancing is not new, it was

[24] https://www.unesco.org/en/articles/unesco-launches-report-impacts-suffered-creative-industry-during-pandemic

exposed by the COVID-19 pandemic (Comunian and England, 2020). Under these circumstances, freelancers turned to their government for assistance. However, many freelancers fell through the gaps as relief schemes tended to focus on employers and employees, and when there was relief for self-employed individuals, creative freelancers often did not meet the eligibility criteria (Comunian and England, 2020). Informal contracts, erratic year-to-year earnings, multiple job holding, short-term contract work and sporadic periods of unemployment were the grounds on which many freelancers were excluded (de Peuter et al., 2023).

In response to the precarious working conditions and perceived lack of government support and understanding, a number of protests by creative workers took place in countries in the Global North and South, including Italy (Tanghetti et al., 2022), France (Pollet, 2020[25]), South Africa (Masweneng, 2021[26]) and Argentina (Quiña, 2023). "COVID-19 triggered a consciousness and collective solidarity that had been previously obstructed due to the fragmentation, individualism and pressure of [creative] careers" (Tanghetti et al., 2022: 630). In the case of South Africa, in an effort to highlight the dire situation facing many creative workers (particularly those working in live events) after five months of no work, the Light SA Red campaign was launched in August 2020 to raise awareness and protest the perceived lack of government support for the sector. As the pandemic and strict lockdown measures continued into 2021, further protest action by artists followed, which culminated in the protest action at the National Arts Council in March 2021 over the perceived mismanagement of COVID relief funds intended to support artists (Van Graan, 2021).

In general, creative workers in South Africa tend not to be unionised. However, the devastating impact of COVID-19 and the dissatisfaction over government relief and support has resulted in calls for more collective action and the emergence of new grassroots initiatives and bodies that seek to represent the sector (Tsumele, 2020[27]). These are domain-specific such as the Sustaining Theatre and Dance (STAND) Foundation which was formed in 2022 by individuals in the sector to nurture, promote and celebrate South African dance and theatre, as well as more general initiatives like the South Africa United Cultural and Creative Industries Federation (SAUCCIF), which was established in 2020 as a grassroots federation to represent the interests of CCI organisations and private companies (Tsumele, 2020). The creation of SAUCCIF has been controversial as it acts as a competitor to the Cultural and Creative Industries Federation of South Africa (CCIFSA), which was established in 2014. These add to existing structures like the Independent Producers Organisation (IPO) and Animation South Africa that represent, protect, and promote film, television and digital producers and animators respectively within the Audio-visual and Interactive Media domains.

In some cases, workers are finding ways of facilitating informal collective action after COVID-19 triggered a greater collective consciousness through the formation of community groups or communities of care (Campbell, 2020; Tanghetti et al., 2022). Social media and digital

[25] https://www.bbc.com/news/world-europe-55314653

[26] https://www.timeslive.co.za/news/south-africa/2021-03-12-artists-camp-out-at-national-arts-council-over-lack-of-stimulus-payments/

[27] https://citylifearts.co.za/the-tale-of-two-federations-in-the-creative-sector-can-both-co-exist/

communication technologies like WhatsApp have helped to foster mutual aid and support where participants can share information, ask for help or advice, advertise creative and artistic work as well as extend networks and meet potential collaborators and employers (Campbell, 2020). Poor-quality working conditions and employers have also been exposed in informal online occupational groups. Therefore, in the same way as freelancers gain a reputation amongst employers, employers have a reputation amongst freelancers that influences who they prefer to work with. Communities of care are also important in this regard as they act as informal rating systems for good and bad employers (Skaggs and Aparicio, 2023). The communities of care may lead to more formal collective action being taken as was the case in South Africa through protest action and the formation of SAUCCIF.

This formal and informal collective action seeks to address the lack of social protections for workers in the CCIs. However, in the African (and Global South) context, it is questioned whether governments are able to adequately protect and offer support to the sector given capacity and resource constraints (Joffe, 2021; Quiña, 2023). With this in mind, support and reform from within the sector itself may be a more viable option. This falls under the approach of creative justice or ethics of care, where organisations, employers and individuals suspend self-interest and assist or care for one another as the responsible and moral action (Banks, 2017; Alacovska and Bissonnette, 2021). In this way, there are shared values and beliefs about what constitutes fair, good, and moral working conditions and practices (Alacovska and Bissonnette, 2021). Over time, these initiatives can become more formalised through legislative policy and industry standards (van Andel and Loots, 2022).

The pandemic sparked greater unity and solidarity amongst the CCIs at the overall industry level where interested parties across the CCIs came together to work in unison rather than working in silos (de Peuter et al., 2023). This was beneficial in creating a platform for shared discussion, a critical means of engage with policymakers and fostering a more united front as a sector in order to increase the level of collective lobbying power of the CCIs as a whole (Tanghetti et al., 2022). Though this solidarity many have been prompted by a moment of crisis to respond to an urgent need, stakeholders in the sector have also begun to consider the long-term structural issues of freelance creative work and the need for lasting policy changes (de Peuter et al., 2023). In addition to activism, industry associations and unions also contribute to the general health of the sector by providing services to members relating to funding and training for creative and business skills.

4.3 Hybrid and Online Work

The measures to curb the spread of COVID-19 included working from home (WFH) for the majority of occupations that governments deemed to be non-essential. Remote work suddenly became mainstream rather than a minority through gradually rising, long-term trend. Following the pandemic, many people have expressed a preference to continue remote working either on a full-time or part-time basis, leading to changes in the organization of work (Barrero et al., 2021). Figure 11 shows a spike in remote working in the US in 2020 that tapers off by 2022 when lockdown measures eased (Statista, 2025[28]). However, there has not been a mass return to on-site work. In 2024, those working on-site (21%) is far less than the 2019 level (60%). This is

[28] https://www.statista.com/statistics/1356325/hybrid-vs-remote-work-us/

largely due to on-site work being replaced by hybrid working – a flexible work model where employees split their time between working remotely (e.g., from home or other locations) and working on-site. It combines elements of both in-person and remote work, offering a balance that accommodates employee preferences and business needs. As of Q2 of 2024, 53% of US workers reported working in a hybrid manner.

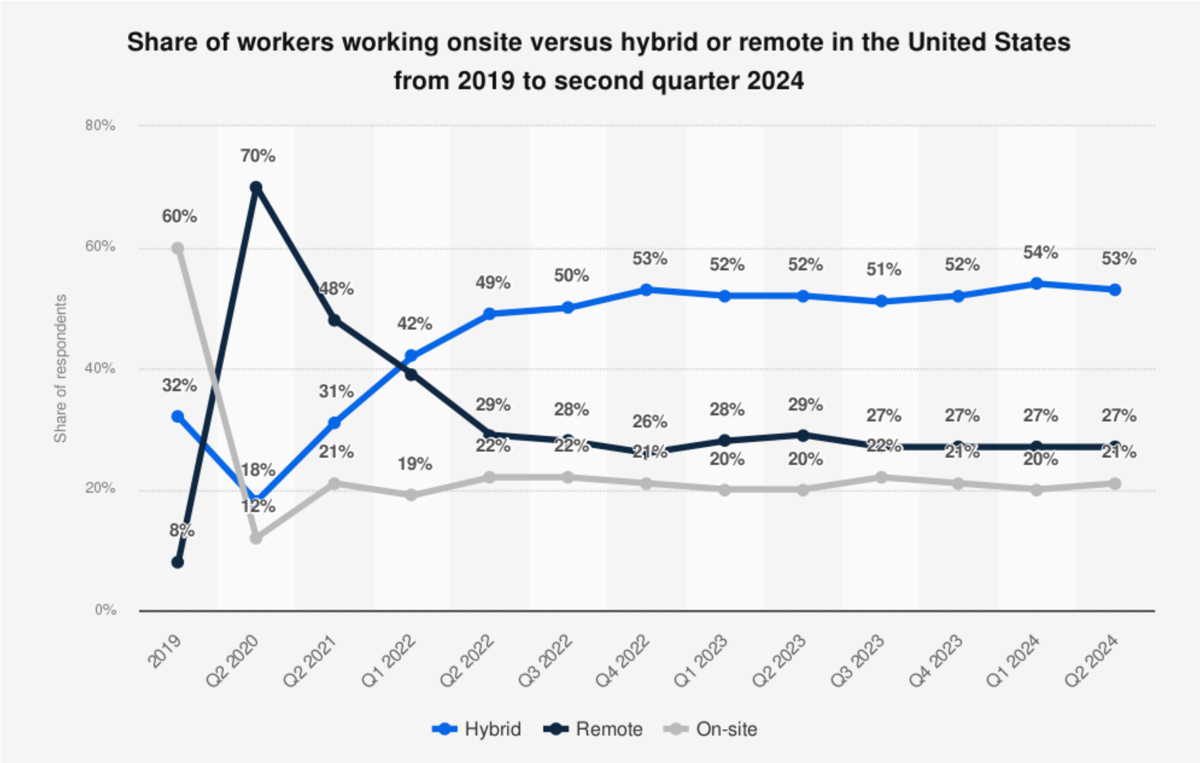

Figure 10. Share of US workers working onsite, remote and hybrid from 2019-2024

(Statista, 2025)

Before, during, and after the pandemic, proponents of remote working tend to list the following advantages; greater flexibility and autonomy, reduced time and transport costs associated with commutes into offices (especially in large cities) as well as other cost savings of WFH, greater work-life balance, increased productivity, better health and well-being and location independence for individuals (Barrero et al., 2021). On the side of the employer, advantages include increased productivity, access to a wider talent pool as proximate physical location can be overcome by technology, reduced office overheads and lower attrition rates (Barrero et al., 2021). For freelancers in particular, remote working may have opened up new opportunities, as they may be able to work with clients across geographical boundaries through advanced online communications technologies and software packages.

The rise of remote working in relation to COVID-19 has caused many, including creatives, to reconsider their location decisions, as people can log in and work remotely from any location. This has been linked to urban lifestyle re-evaluation as some people have become dissatisfied with metropolitan careers and lifestyles. Metros like London and New York are increasingly perceived to be unliveable due to their growing unaffordability, feelings of having a poor work-life balance, and a relative lack of access to natural amenities and green spaces (especially concerning during the lockdowns when people were confined to their homes) (Alacovska et al., 2021). Smaller cities and towns are being presented as an alternative to cramped and expensive living in large metros. Several of these places have experienced an in-migration of people who are able to work remotely with relative ease. These places have been coined ‘Zoom towns’ which is in reference to the popular telecommunications platform Zoom that enabled many to work remotely during the pandemic. A number of potential Zoom towns have been identified in South Africa by the press[29] and real estate agents that are scenically beautiful, comparatively affordable, and within reach of a city and airport for commuting purposes. A greater range of options has become available for people to choose where and how they would like to work. A benefit of this may be greater regional linkages with cultural and creative hubs forming in smaller cities and towns surrounding a main metro so that the economic benefits of the CCIs are shared more widely (Brydges and Hracs, 2019).

Globally, 73% of employees want flexible remote work options to remain post-pandemic, while 67% desire more in-person collaboration (Microsoft, 2021[30]). This balance between remote flexibility and in-person interaction is particularly relevant for the CCIs that often rely on collaborative processes. Hybrid work may allow for the best of both worlds as people work remotely (often in smaller centres or Zoom towns) and meet in person as required by practising three types of mobility (Brydges and Hracs, 2019). Temporary mobility refers to moving between smaller centres and metros for special events and meetings, while mediated mobility is when creatives work with intermediaries in a metro to help maintain their presence there, and lastly, virtual mobility uses the internet and social media to let creatives base themselves in smaller centres while connecting to clients in the metro remotely. Recent research on fashion designers in South Africa shows that some creatives are based outside metropolitan areas and maintain links to the creative city through these three types of mobility (Gatawa and Snowball, 2024).

However, not all occupations are suited to hybrid and remote working. Those who are able to take advantage of the location independence associated with remote working tend to be those in occupations that can easily be done online. In the case of the CCIs, hybrid working is most prevalent in domains like Audio-visual and Interactive Media (gaming, animation, VFX) and Design and Creative services (graphic design). Other demographic characteristics like age may also influence location preferences.

Access to fast and reliable broadband connectivity has become crucial for the growth and sustainability of hybrid and remote work (Townsend et al., 2017). Moreover, a disadvantage of freelancing is the isolating effect of this type of individualistic creative work and manner of working (de Peuter, 2014). In smaller centres, this may have a knock-on effect on creative careers, as it is more difficult to network and receive feedback on work. One possible way of overcoming these challenges is through co-working spaces where like-minded people can connect and collaborate and where high-speed internet is provided (Capdevila, 2022).

[29] https://www.businesslive.co.za/fm/features/2020-10-21-zoom-boom-sparks-city-exodus/

[30] https://www.microsoft.com/en-us/worklab/work-trend-index/hybrid-work

5 International Trade Trends

The Sustainable Development Goals (SDGs) describe international trade as an “engine for inclusive economic growth and poverty reduction.” Although still making a up a small percentage of global international trade, cultural trade is increasingly being recognised as an important and growing contributor to development. In a recent study of European countries, it was shown that cultural goods exports and imports increase GDP in the long run (Scavia et al. 2021), and that cultural imports have a causal relationship with economic growth, other exports, and capital formation (investment).

Global creative goods exports increased from US$208 billion in 2002 to US$713 billion in 2022 (Cortizo and Moresino-Borini 2024). In terms of volume, Asia is the largest exporter of creative goods (being driven substantially by China, which accounts for 35% of global creative goods exports in 2022), followed by Europe and North America.

The establishment of the African Continental Free Trade Area, while still being negotiated also offers great potential for cultural trade, with a market coverage of 1.2 billion people.

5.1 Diversity in Cultural Trade and Regional Blocs

There is a long-standing debate in cultural trade about how to strike a balance between protection of cultural identity and heritage, and the promotion of trade in cultural goods and services. The 2005 UNESCO Convention on the Protection and Promotion of Cultural Expressions put in place a mechanism to allow states to treat cultural trade as an “exception” to the usual free trade rules. The Convention also encourages developed countries to give preferential treatment to cultural trade from developing countries on the grounds that it is important to build a more balanced global flow of cultural trade. This can be done though both funding (International Fund for Cultural Diversity) or technical assistance (UNESCO, 2005). The 2005 UNESCO Convention thus aims to improve cultural diversity by giving states the sovereign right to adopt and enforce their own domestic cultural policies. For developed countries, this includes giving developing and least developed countries preferential market access, but it can also be used to restrict cultural trade on the grounds of protecting cultural diversity in the domestic market (Zhao 2023).

Some authors (De Beukelaer and Tran 2024; Goff 2021) are critical of the progress made via the Convention, arguing that it is more concerned with ways in which developed countries (France and Canada) can protect their cultural sector from US competition, and that International Fund for Cultural Diversity, which relies on voluntary donations, is too small to make a real difference. Certainly, the share of international cultural trade globally has traditionally been dominated by the global north. However, there is evidence that this is changing, particularly in services trade (discussed in section 5.2 below). As found in a recent UNCTAD (2024) report, global exports of cultural goods recovered quickly from the COVID-19 pandemic and continue to grow quickly, especially in Asia.

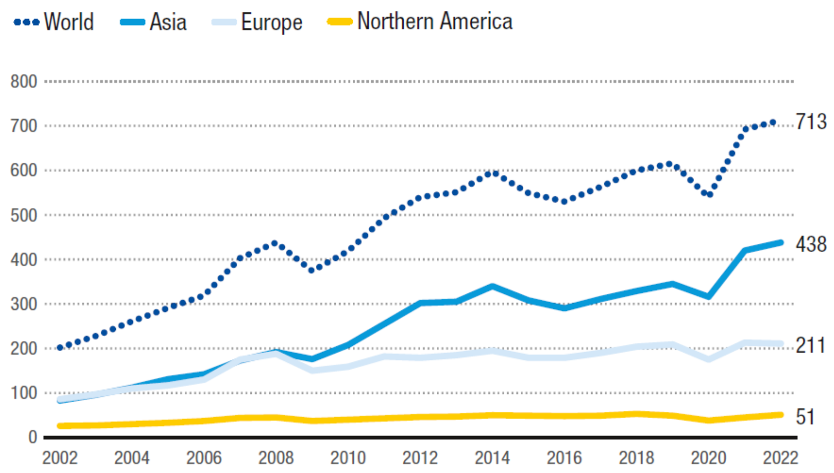

Figure 11. Exports of all creative goods by region (US$ billion)

(Source: UNCTAD, 2024)

However, the share of global cultural goods exports from developing countries has not increase much in recent times, despite the increase in preferential measures that have been put in place (UNESCO 2022).

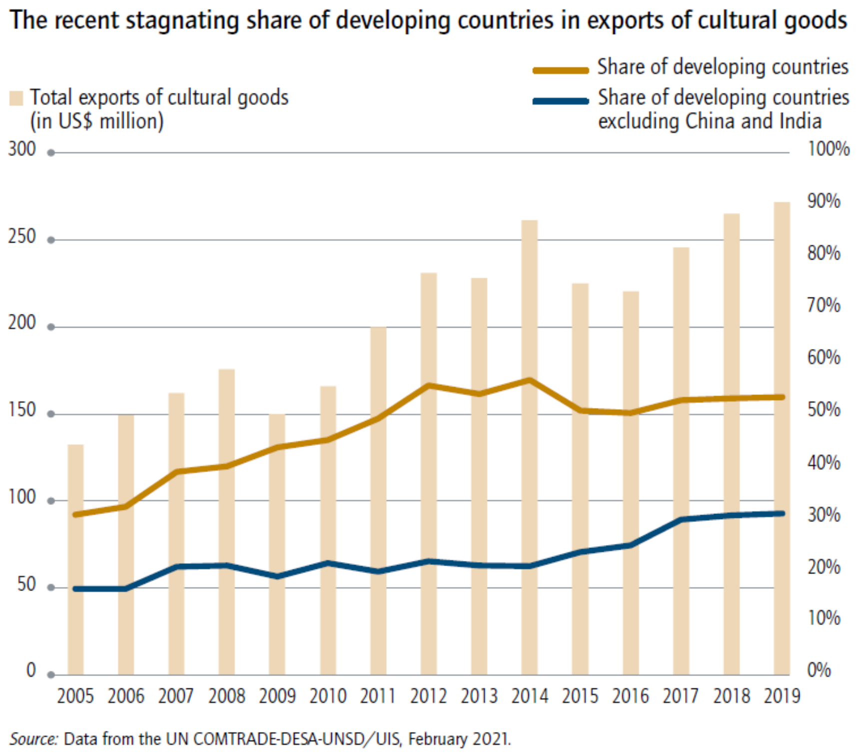

Figure 12. Global share of cultural goods exports from developing countries (2005 – 2019)

Source: UNESCO, 2022.

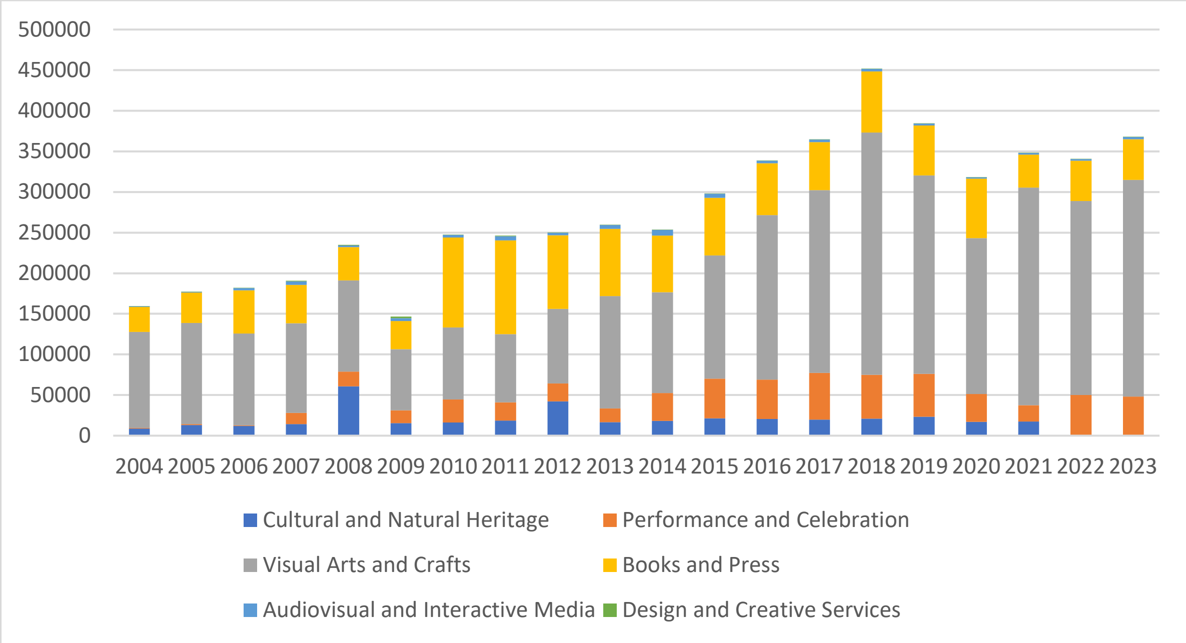

Figure 13. South African export of Cultural goods (in US Dollars) 2004-2023

In South Africa, cultural goods exports have risen substantially over time, although they have not yet recovered to pre-pandemic volumes. The most important domain for cultural good export earnings is Visual Arts and Crafts, followed by Books and Press. In terms of their contribution to GDP, Audio-Visual and Interactive Media, and Design and Creative Services are large but their value is not reflected in cultural goods exports. This is because they have “dematerialised”, so that rather than exporting “goods”, almost all this trade now takes place a digital services.

5.2 Rise in Services Trade as Cultural Products Dematerialise

In the last 10 years, the volume of cultural services trade globally has far outpaced cultural goods trade (UNCTAD, 2024). This is largely because cultural and creative goods have “dematerialised” and are now traded in digital format. For example, music records and CDs have been replaced by downloads and streaming; physical books have been replaced by eBooks, and even architectural plans and designs are traded as electronic files and data, rather than hardcopies. The measurement of services trade is difficult and incomplete, especially for developing countries. The latest UNCTAD Creative Economies Outlook report (2024) acknowledges this difficulty and bases its analysis on the 99 countries that did report creative services trade data for 2022. The services trade categories used are: advertising, market research, and architecture; audio-visual; cultural, recreational, and heritage services; information; research and development; and software.

The UNCTAD (2024) report shows that creative services exports had a faster growth rate than total services over the last 10 years. In addition to this, in the last 5 years (since 2019) developing countries have had higher growth rates in creative services than developed countries. However, some trade agreements specifically exclude customs duties related to digital services, which significantly affects the CCIs. The customs duty issue has been an ongoing debate at the WTO, with India and South Africa, amongst others, arguing that the long-standing ban on duties on electronic trade should be reviewed in the light of dematerialisation and the growing importance of e-commerce (Hanania, 2019).

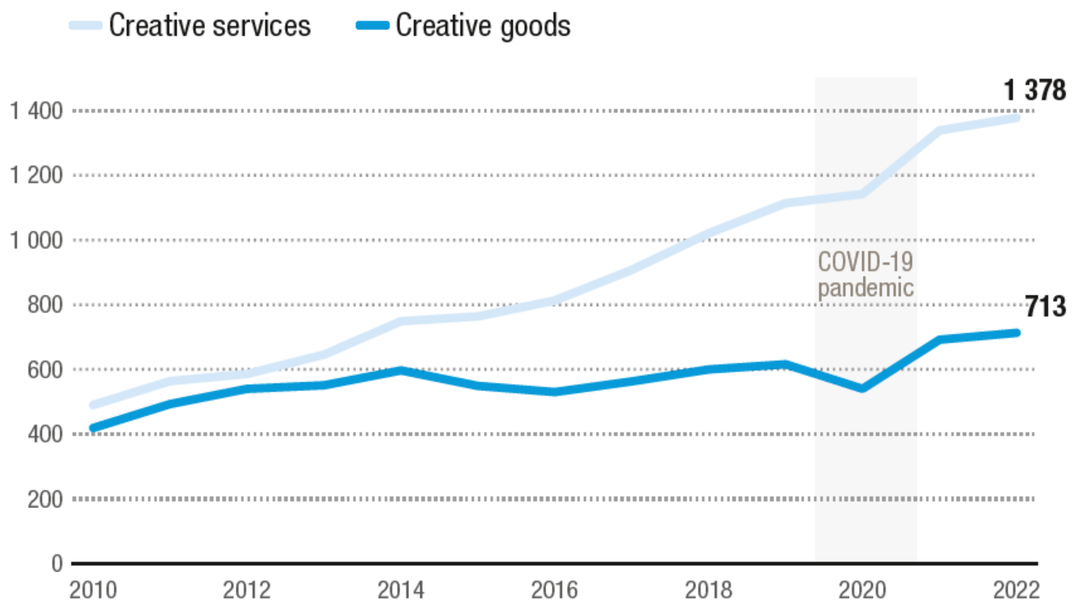

Figure 14. Global exports of Creative Goods and Services

Source: UNCTAD Creative Economy Outlook, 2024

Unlike the General Agreement on Tariffs and Trade (GATT), which oblige World Trade Organisation (WTO) members to grant market access, the General Agreement on Trade in Services (GATS) only applies to the extent for commitments made by each member in terms of granting market access. As the importance of cultural services trade has increased, this means that countries like China (who have an obligation to liberalise trade in cultural goods) have no obligation to permit cultural services trade (Zhao 2023).

Dematerialisation of cultural trade also creates challenges for trade policy in terms of protection of the intellectual property on which its value is based (Fazio, 2021). For example, enforceable laws on copyright, royalties, and performer's rights are essential for monetising cultural product and services trade. Different levels of IP protection between countries can also complicate cultural trade (Footer and Graber, 2000).

Despite its importance, negotiation of IP clauses in trade agreements is not costless. Traditional instruments like quotas and copyright are less easy to enforce in the online environment (Hervas-Drane and Noam, 2017). Campi and Duenas (2018) find that trade agreements with an IP clause do delay implementation but are effective in increasing trade flows from developing to developed countries. Trade agreements with no IP clause are implemented more quickly but tend to favour developed country partners more.

Data analysis shows that services trade in important cultural categories, like Audio-visual and Related Services (AVRS), is still dominated by the global north (America and Europe). This is starting to change as the 2018 compared to the 2022 figures show, but Africa still exports only 1.26% of AVRS globally. Most of the Developing Country growth has come from China, which is the third largest creative services exporter (US$ 67 billion), after the UK (US$ 87 billion) and Germany (US$ 79 billion).

Table 3. Regional Shares of Audio-visual and related services exports 2018 and 2022

	2018 (%)	**2022 (%)**
Africa	1.073	1.257
America	51.752	47.094
Asia	6.279	20.699
Europe	39.158	29.727
Oceania	1.739	1.223

Source: ITC, UNCTAD, WTO trade in services database; Authors' own calculations

The potential advantage that developing countries have in cultural services trade can be seen in the growth rates of Audio-visual and Related Services Exports growth rates. Africa had the highest growth rate between 2020 and 2022, albeit off a low base, followed by Asia. America has a small positive growth rate (much reduced from the 2005 – 2010 period) and Europe has a negative growth rate for AVRS exports in the most recent period. Focusing on the US (which has traditionally dominated the AVRS area), data shows that, from 2019, there has been a trade deficit in this category (the value of exported AVRS is less than the value of imports in this category).

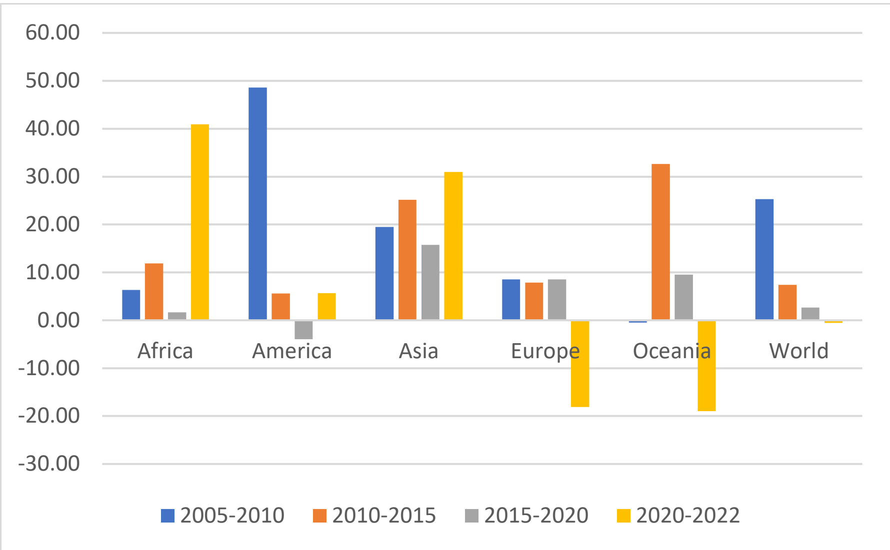

Figure 15. Average annual growth rates of Regional AVRS Exports 2005 – 2022

Source: ITC, UNCTAD, WTO trade in services database; Authors' own calculations

This is thus some indication of increasing diversity of cultural services trade, although, as noted, still dominated by the developed countries. However, the African data is likely to be an underestimate of the size of the AVRS industry because of the informal nature of much of this content distribution.

As an indicator, Google Trends data is used to track worldwide searches for Nigerian movies on YouTube which can be accessed without a subscription, therefore capturing more of the informal sector. As shown, there has been a significant upward trend in searches for "Nollywood" content between 2019 and 2024 – a trend which has endured in the post-COVID period.

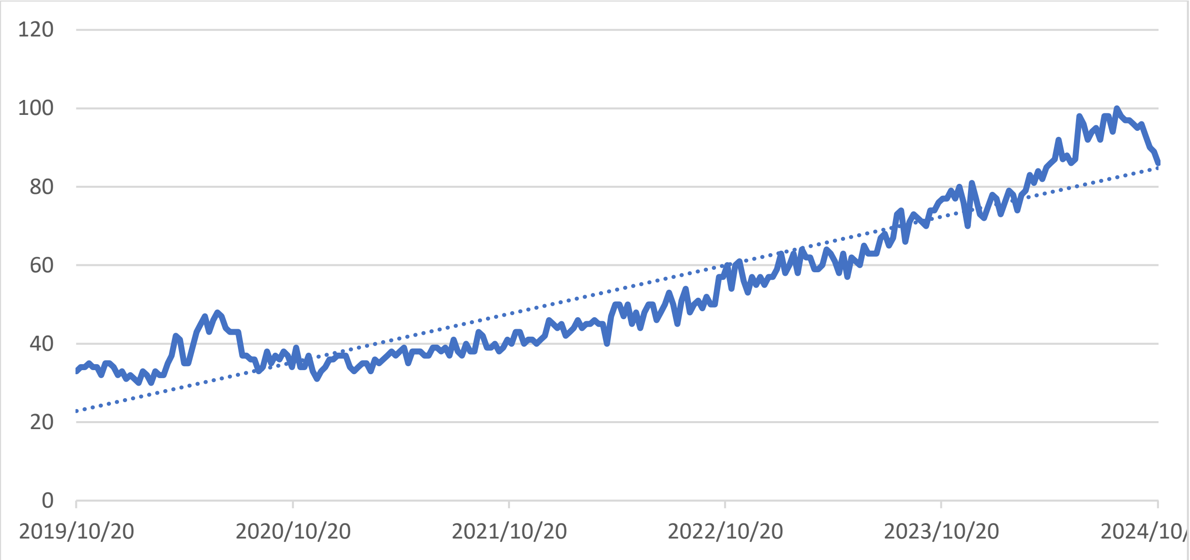

Figure 16. YouTube Searches for Nollywood movies (Worldwide) 2019 – 2024

Source: Google Trends

Unfortunately, disaggregated data on export services is not currently available and therefore the category "Personal, Cultural, and Recreational Services" is used as a proxy. This includes audiovisual services, cultural performances, and other creative outputs. Cultural services trade in has grown substantially globally. This is driven by digital technology and increased demand for diverse cultural expressions. Developed countries dominate the sector. For developing economies, particularly in Africa, the digital transformation offers new opportunities to access global markets and overcome traditional barriers to trade. Currently, South Africa's (and even Africa's) exports of this category are very low.

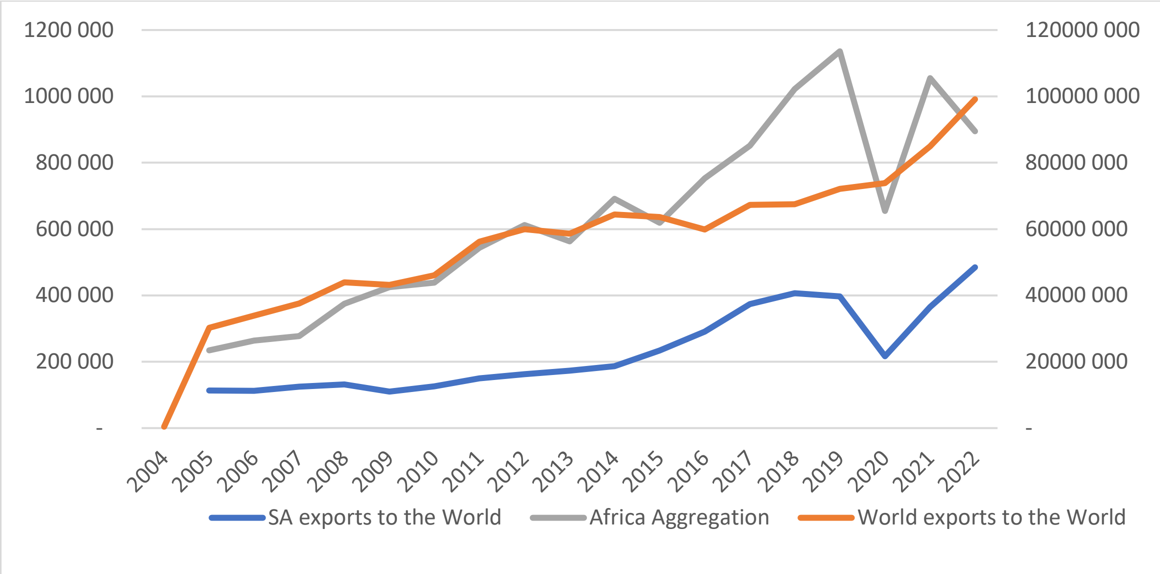

Figure 17.. Exports of Personal, Cultural, and Recreational Services

South Africa’s share of world exports in this sector remains modest. It seldom is greater than 0.5% of world trade in Personal, Cultural, and Recreational Services. South Africa has a well-established creative economy, with strong film and music industries. The low share underscores the need for greater global engagement, investment in digital platforms, and the promotion of South African cultural services in international markets to increase visibility and competitiveness.

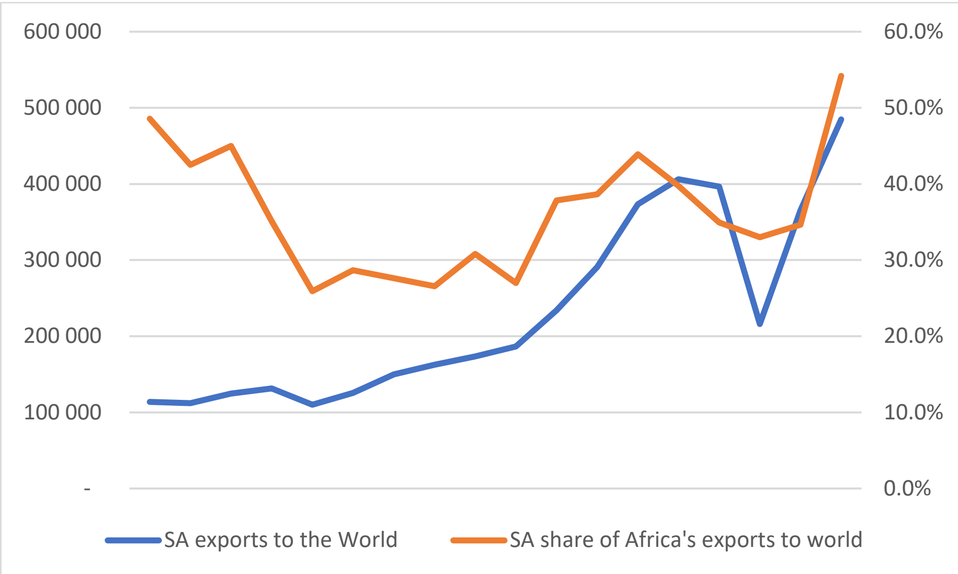

Figure 18. Share of Personal, Cultural, and Recreational Services exports

From 2004 to 2022, South Africa's contribution ranged from 25.9% in 2008 to a peak of 54.2% in 2022, indicating its capacity to lead cultural and recreational exports on the continent. However, the varying percentages show inconsistencies, which could be attributed to global economic fluctuations, regional challenges, or changing competitiveness in South Africa's cultural service offerings.

5.3 South-South Cultural Trade

In 2018, South Africa was a signatory to the establishment of the African Continental Free Trade Area (AfCFTA). Although the implementation was delayed because of COVID-19, it does offer an interesting opportunity to South African creative industries. The first phase of AfCFTA negotiations covers goods and services, with the potential to reach a market of more than 1.2 billion people. Phase 2 will address property right, investment, and competition policy.

The *First Ten-year Implementation Plan* of the African Union's Agenda 2063 emphasised the importance of the protection of African cultural heritage, while still promoting "the creation of culture-driven businesses" (AU, 2015:54). However, the *Second Ten-year Implementation Plan* (AU, 2024) has a much more explicit role for culture and the creative industries, including increasing Africa's contribution to global output in the creative industries (including film, literature, theatre, music and dance, and couture) to at least 15%.

Table 4. South African Cultural Goods Exports and Imports by Region

Region	SA exports	% Exports	SA imports	% Imports
USMCA	149.440	39.1	37.798	9.58
EU28 (including UK)	86.115	22.5	101.985	25.8
Rest of SADC	75.928	19.9	13.586	3.44
Rest of BRICS	34.623	9.06	156.624	39.7
Rest of Africa less SADC	13.219	3.46	0.616	0.16
Middle East	5.736	1.50	2.328	0.59
Latin America less Brazil	3.305	0.87	3.172	0.80
East Asia less China	1.725	0.45	26.151	6.62
World	**381.961**	**100.00**	**394.742**	**100.00**

(Source: SACO Mapping Study, 2022)

The 2022 SACO Mapping study found that the United States, Mexico and Canada (USMCA) were the most important markets for South African cultural goods exports (39%), followed by the European Union (EU). However, the next most important markets were African (Southern African Development Community, SADC, and the rest of Africa), and the Brazil, Russia, India and China (BRICS) trading bloc. South Africa imported the largest share of cultural goods from BRICS (39.7%), followed by the EU (25.8%). This shows a rise in the importance of cultural goods trade between developing countries, although the global north still remains an important market for South African cultural goods exports.

Another non-Western country that has seen a recent surge in cultural services exports is South Korea. The phenomenal success of the "Korean Wave", or *Hallyu* effect, has been largely driven by innovative cultural policy for the digital creative industries (UNCTAD, 2024). In 2020, creative content exports (including film, music and television) were worth US$11.9 billion. The sector showed a 17% per year growth between 2016 and 2020.

Part of the international success of the Korean Wave can be explained by the role of social media influencers and the diaspora, who helped to generate popular interest in Korean creative content. However, innovative public policy also played a role. For example, copyright policy was recognised early on as an essential component for creative industries success. To increase enforceability and reduce costs for creatives, standardised terms of copyright contracts were developed, copyright authentication was provided by specialist government agencies (on the strength of which copyright holders could obtain development finance), and pre-established (statutory) damages for copyright infringement were put in place. Important institutional governance systems, such as the Content Industry Promotion Committee, chaired by the Prime Minister and with representatives from 11 ministries, were also put in place to update and direct strategic policy.

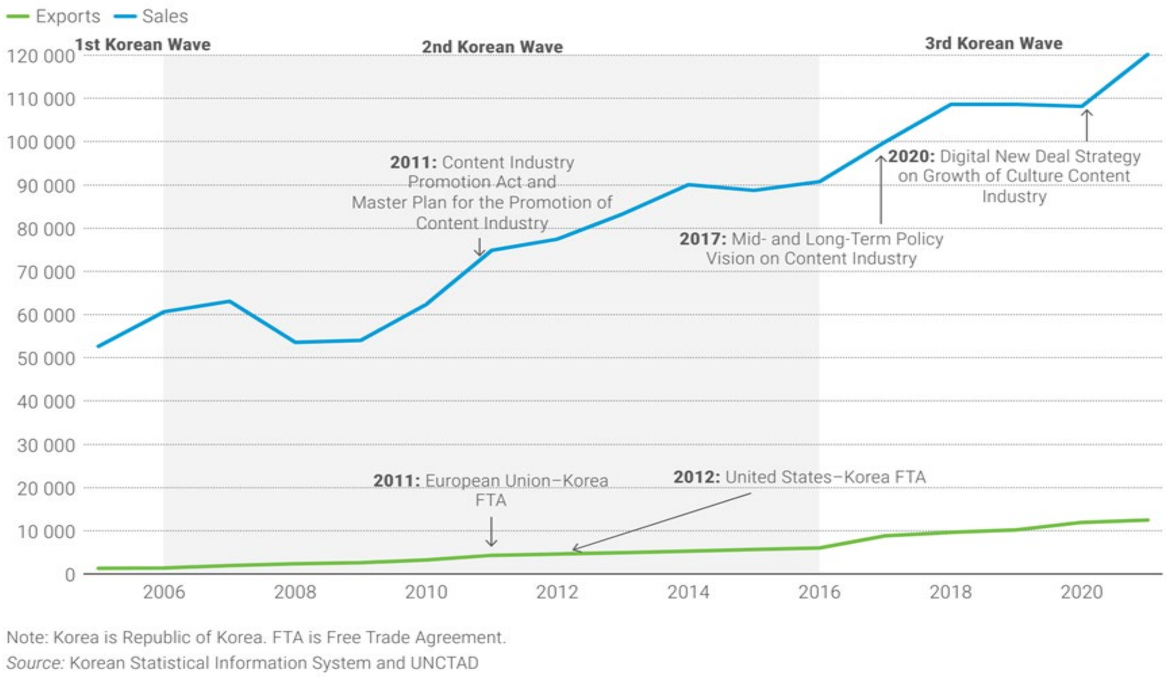

Figure 19. Korean creative industries sales and exports in relation to government policy

(Source: UNCTAD, 2024)

The Korean case demonstrates how non-Western countries can take advantage of the potential of the digital creative industries to grow their international trade, but that, to capitalise on this important trend, they will need to put in place the right digital infrastructure, as well as providing IP enforcement and protection.

6 Managing the Creative Economy

6.1 Cultural Policy

Cultural policy in its early iterations was primarily about the public funding and support of art. The late 20th century and early decades of the 21st century have seen a wholesale expansion and restructuring of cultural policy and its applications. In the post WWII decades, there were relatively substantive interventions, whether direct or indirect, to fund the arts with the dual intention of securing and providing access to culture, and to do so in the advancement of national interest (Toepler & Zimmer 2002). In subsequent decades the scope and application of cultural policy continued to grow. The partial decline of the welfare state and growth of market-oriented public policies had a significant effect, especially in the Anglophone national economies, and later in most of the Northern economies (Durrer, Miller & O'Brien 2019).

Cultural policy moved beyond central government into extra-national and sub-national terrains and cities (Haines & Lotter 2023). It interacted with cultural diplomacy, philanthropy, local economic development, and the burgeoning manifestations of cultural and creative business (Martell 2020). By the end of the 1990s, digital technologies had dramatically reshaped culture and entwined with the developing cultural and creative industries and the globalisation of content.

By the early 2000s, these shifts included the growth of cultural diplomacy and 'soft power'. There was also an emerging realization of the significance of education and leadership for the evolving cultural sector (Price 2017). Furthermore, the question of the 'creative class' (Florida 2005) and variants of the 'creative city' would also become CCI currency. Along with these discourses and processes, the question of place, locale and spaces, and their histories have become important in economic and industrial development policies and planning as well as in the invocation and promotion of the CCIs in such productions (Haines, Gouws & Lutshaba 2020).

The strengthening of the CCIs is becoming more important in the context of international development cooperation as well, with various bilateral and multilateral organizations engaging with the sector or moving into the relevant fields (Europarl 2016b; UNESCO 2023). Organizations such as UNCTAD, UNESCO, OECD, the World Bank, and the Bank's subsidiary, the International Finance Corporation (IFC) recognize the potential of the CCIs, and have begun undertaking policy research and joint projects, especially since the mid-2010s. A key recent trend is that of initiatives and one-off projects on a joint or collective inter-agency basis. For example, the World Bank jointly with the GIZ established a 'Creative Economy Alliance' (CEA) to promote diversity and youth employment within the CCI, to exchange amongst CCI professionals and practitioners, and to assist where required the relevant local authorities (World Bank 2023; GIZ 2023).

The involvement of the International Finance Corporation (IFC) in CCI investments comes with the Corporation's commitment to Environment, Social and Governance (ESG) requirements, with private and public sector applicability. Recently, the IFC made its first investment in the creative industry sector in Africa, with a US$3 million equity investment into a Côte d'Ivoire-based ANKA. In October 2023, the IFC and the Sony Group Corporation signed a cooperation agreement to identify investment opportunities in companies in the creative industries in Africa to support new economic opportunities and create jobs (World Bank 2023a).

In recent decades there has been a discernible growth and diversification of actors in the field of international cultural relations and sub-fields such as the creative industries. From a policy terrain, which was traditionally dominated by international organizations and states, a variety of actors at the regional or super-national level, and at the sub-national level, have been more directly active on the international state. One example is the international city-network UGL305, which has a defined cultural policy strand. The growing emphasis on international creative and design cities has reinforced this trend (Haines & Lotter 2023).

The late-2010s and early-2020s have seen an expansion of CCI promotional activity by EU agencies and partners, including work in developing countries on matters such as supporting the role of local authorities in partner countries. One such initiative was the Monitoring Tool for measuring and managing CCI interventions at city level, which was being developed by the Commission's Joint Research Centre. It helps categorize the cultural and creative 'flourishing' of cities in terms of the following key metrics; cultural vibrancy, creative economy, and enabling environment, which in turn can be converted into a cumulative C3 index (Tsanova 2024).

Overlapping such developments has been the expansion of the EU/UNESCO Programme dating back to 2011, which sees the European Union supporting UNESCO's technical assistance in developing regulatory frameworks for CCIs in line with the 2005 Convention. Through two consecutive phases of the Programme, 25 countries have elaborated 30 regulatory frameworks. The new four-year cycle 'Policy Elaboration for Creativity' runs from 2023-2026 and includes eight countries; Belize, Chad, Côte d'Ivoire, Djibouti, the Dominican Republic, Jordan, Nigeria, and Rwanda (UNESCO 2023a).

In late 2023, UNESCO convened a meeting in Buenos Aires with thirty international experts to review global strategies which in principle support the emergence of dynamic creative sectors. These experts were drawn from the EU/UNESCO Expert Facility, supporting the EU-funded UNESCO Programme focussing on the advancing of evidence-based policies and actions as well as associated policy making. The aim of this was to enhance the contribution of CCIs to sustainable development (UNESCO 2023). Such kinds of interventions by international, regional, and bilateral cultural agencies are likely to grow in number and intensity.

Conventionally, the public management of CCIs has been encompassed within the terrain of cultural policy. And indeed, as Cunningham (2004) has pointed out, this has been accommodated by current broad definitions of the creative economy, given that some parts of the sector are probably better administered by public subsidy and education, while others require a more industrial or innovation-oriented policy tack. However, the problem is deeper than this. A 2021 study emphasizes the paradox of the situation and the associated policy drift:

> Yet this political resolve to advance the creative economy and harness its economic power is not matched by the same level of public policy investment. Indeed, over the past 20 years, in the absence of in-depth reform of cultural policies to embrace the broad spectrum of the economic weight of the CCIs, public authorities have left the field open to market forces and the private sector. Beyond policy declarations on the importance of the creative sector, public policies remain fragmented overall, which echoes the complexity of a wide, multi-layered sector (UNESCO 2021a).

There is no doubt that finding a balance between spending on public goods and services and investing in the creative economy has become a more instrumental choice than in previous decades (Snowball & Haines 2024; Buchould et al 2021). A further concern for aspirant progressive cultural policy is to address the structural disparities established by the digital platforms and the super-profits generated for their owners and shareholders (Buchould et al 2021).

There have been several key cultural policy trends over the last decade. These include an increased recourse to partnerships and cooperative approaches to governing and leveraging resources for the CCIs. Amongst the more formal aspects of such trends is the increased use of Public Private Partnerships, and the growing sophistication and broader base of PPPs. Within and without the CCIs there is an increasing involvement of non-business and non-state actors and the accessing of more varied kinds of funding (Haines & Gouws et al 2023).

Another important trend is the increased use and/or creation of inter-governmental approaches and structures at national and sub-national levels. Amongst the most thoroughgoing of such interventions has been the Columbian Government's Orange Economy initiative. Columbia's OE policy framework consciously positions culture and creativity at the centre of its development agenda and drive. The policy emphasises not only the intrinsic value of culture and creativity, but also their contribution to wealth and income generation, job creation, local development, and well-being (OECD 2023). The comprehensive OE policy approach is both designed and implemented by means of a 'whole-of-government' effort, yoking and leverage all government structures and relevant resources.

The trend to more formal and structured inter-governmental cooperation in regard to the CCIs can be seen in a range of developments internationally. One such example is the recent policy recommendation accepted provisionally by South Africa's DSAC for the creation of an inter-governmental committee to develop formal measures and resources regarding the Social Security Provisions for CC artists, creative practitioners, and workers. The Committee would be comprised of the Ministries of Sports, Arts and Culture, the Department of Trade, Industry and Competition, and other involved national agencies and SOEs, as well as some sub-national representativity (Haines & Gouws et al 2023).

Furthermore, the relatively recent 'recourse to ecosystem approaches' will see more attention paid to the socio-economic locale, infrastructure, and social and capital aspects of cultural policy by local authorities and their partners. Since the late-2010s, there has been a growing invocation of ecological discourse regarding the CCIs in research and policy construction.

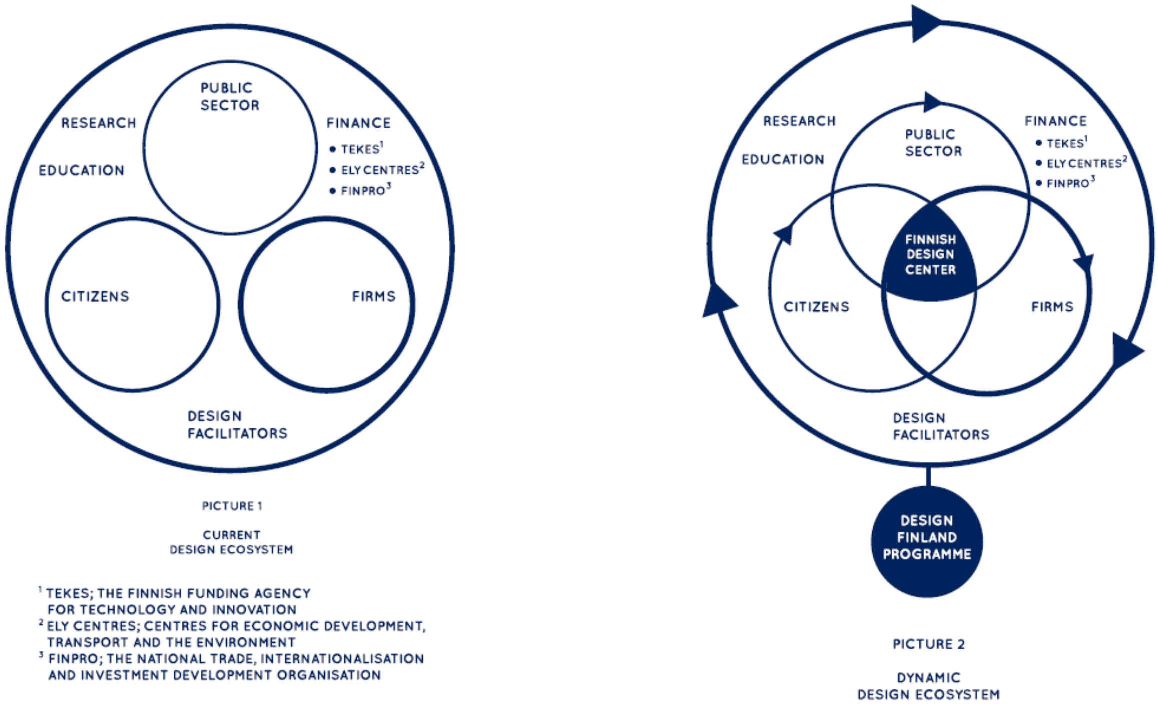

Figure 20. The Ecosystems Approach of the "Design Finland" Programme

The government's main function, according to the creative ecosystems approach, is that of maintaining the ecosystem in equilibrium by implementing industrial policies that nurture the development of CCIs. Public support in creating a welcoming private sector environment for CCIs is crucial. According the UNIDO, policies in support of CCIs should have the following features; the creation of a coordination body for multi-sectoral input, financial support and fiscal policy, regulatory framework and legislation, development of infrastructures, incubation and start-ups with SME support, and Public Policy Promotion (Bakalli 2014).

6.2 Intellectual Property and copyright

An important part of cultural policy is the regulation of the sector. Intellectual property (IP) rights and copyrights are central to the CCIs, given their reliance on creativity, design, and innovation. Consequently, the rights of creators is important in ensuring that they have due recognition and compensation for their work. However, IP laws are often complex and problematic, with digital content prone to being shared and replicated online. Piracy and unauthorized use of creative content are further problems, which in turn can undermine the financial viability and sustainability of creative companies and ventures and inhibit innovation. Ensuring there is fulsome IP protection while establishing an accessible, fair and user-sensitive digital environment is now a vital challenge for CCIs in both developed, emerging, and less-developed countries.

The ongoing digital transformation of the CCIs poses a range of challenges regarding the management of a changing sector. Compounding these issues has been the increased presence of AI within the CCIs. The digital CCI is bound up with the increased prominence and pervasiveness of macro digital platforms, market imbalance, and the use of creative content often without proper remuneration.

In a variety of countries, including those in the EU, regulations do not protect artefacts generated by artificial intelligence. Indeed, in the regulatory frameworks of Germany and the UK, the AI system cannot be an author or creator. Copyrights protecting creators are made for an analogue environment, and as such, these new and emerging business models such as digital streaming constitute a challenge for copyrights experts. Policymakers globally need to address matters such as royalties for artists on streaming platforms and the re-selling of e-books (UNESCO 2022; Haines & Gouws et al 2023b). Development challenges also exist vis-à-vis AI-linked IPRs, as some developing economies have regulatory gaps and shortcomings. This is particularly the case regarding the regulation of new technology (UNESCO 2022b). Developing asymmetries in accessing and/or using AI within less advantaged economies underline resource allocation problems.

Some of the earlier responses to the growing economic power of the digital platforms came predominantly from EU member states during the late-2010s and early-2020s. Well thought-out tax reforms could make it possible for developed and developing nations to collect revenues generated within their borders by big tech companies as well as platforms like Netflix. It should be noted, though, that there are institutional and coordination challenges because such digital-specific taxes could lead to retaliatory measures by the likes of the United States of America. The USA has already initiated trade investigations against countries such as France, Germany, and Indonesia, arguing that such tax methodologies unfairly single out US firms (Christie 2021).

In parts of the developing world, some nations moved to modify their tax systems to include transnational audio-visual content providers. This trend is quite distinct in Latin America. For example, Brazil has been a leader for some decades in stressing the importance of local content. In 2018, the Brazilian government announced its plans to tax international and local companies' operation on-demand video streaming services (Marques 2018). The intention was for the taxation to also soon be levied on companies such as Netflix, YouTube, and cable providers that offer video-on-demand (VOD) (Marques 2018).

Challenges to digital platforms have tended to come primarily from the EU, including efforts to regulate their activities in the CCI arena in both developed and emerging regions. The Digital Services Act (DSA) and the Digital Market Act (DMA) constitute a single set of rules applicable across the entire EU region. The two main aims of the measures are as follows:

- To encourage the formation of a safer digital space in which the fundamental rights of all users of digital services are ensured.
- To help establish in the European Single Market and a globally level playing field to stimulate growth, competitiveness, and innovation.

According to some commentators, countries such as Brazil and the US are considering the EU regulation with considerable interest. While these two linked legislative measures will have some regulative impact, this issue according to some critics, underestimates "the immense power of Big Tech", and addressing this issue requires "more than just a single piece of legislation" (Shankar 2023).

Policy and regulatory frameworks have battled to keep abreast of these rapid changes/transitions. In recent years there has been marked increase globally of advocacy and consciousness-raising programmes for policymakers, consumers, artists, and creative practitioners on the significance of copyright laws for the distribution and consumption of cultural content on digital platforms. Such programmes have been provided by state, creative associations, and other groupings.

Among the examples of such interventions is a UNESCO-funded initiative in Rwanda which ran from 2019 to 2020. The capacity-building initiative had the following aims:

- Strengthening of cross-sectoral cooperation in the implementation of IP law in Rwanda, working with several Rwandan public institutions on the administration and enforcement of IP rights, including the Ministry of Sport and Culture, the Ministry of Trade and Industry, the Rwanda Development Board, and the professional association entitled the Rwanda Society of Authors.
- Establishing an online and conference platform which would help strengthen the processes and mechanisms for the implementation of IP law.
- Reinforcing the role of civil society in the enforcement and implementation of IP rights. The conference and online platform enables policymakers to work with civil society organizations and individuals to design, revise, and implement strategies and policies in IP rights for CCIs (UNESCO 2019/2023d).

As well as this, apart from the increased offering of capacity and promotion events and ventures, there are also increased signs of the development of specific legislation with direct application in the CCIs. For instance, as of 2024 India is currently finalizing a Digital Competition Bill to lay down guidelines for digital economy firms. The Bill favours a "higher scrutiny of digital firms and preventing monopolistic tendencies fuelled by algorithmic collusion". Following inter-ministerial consultation, the Bill will be presented to Parliament (India Briefing, 23 May 2024).

6.3 Public funding for the CCIs

There was mass investment in culture in the later-1970s and 1980s, both by governments (especially in countries such as France with a strong welfare state tradition), from philanthropic sources, and the non-profit sector, thanks to state tax deductions (most particularly the United States (Rosenstein 2019: OECD 2022c). However, this spending did not match expectations regarding improved cultural practices and outputs (ibid.). Rising state expenditure and growing calls for more market-related efficiencies also informed policy rethinking (Loots et al 2022). Despite increased promotion by public and private sector institutions, CCIs, and most especially smaller businesses and organizations, continue to experience inadequate access to funding. Historically, public funding of CCIs was seen as a form of public or 'merit' good. This perception has changed over time and is informed by instrumental considerations as well as a growing but somewhat uneven recognition of the direct and indirect effects on the economy and society (Rosenstein 2019; Loots et al 2022; GIZ 2024). However, as UNCTAD points out, most countries acknowledge the creative economy's beneficial economic and societal effects (UNCTAD 2024).

Along with a working understanding of the roles of culture, creativity, and innovation within economic and industrial development, a more diversified approach to the funding of the CCI has evolved. There is more emphasis on the economic returns to government spending, and more opportunities for private investment. In turn, more complex ecosystems have developed, incorporating public, private, philanthropic and concessional funding and investment (OECD 2022; GIZ 2024). The pace and pattern of these mega-developments and trends differs between and within advanced, emerging, and developing economies, and the particularities of state, society, and economy relations will need to be taken cognizance of in individual and regional cases.

Government spending on cultural services has been decreasing globally. Across the OECD, this trend represents, on average, 1.2% of total government spending. Interestingly, during the growth period preceding the global financial crisis of 2008-9, government expenditure on cultural services was increasing in most OECD countries, but has since then generally remained below pre-2008 levels (OECD 2022).

The increased realization of the nature and extent of the economic impact of the CCIs has seen the locus of public funding extend beyond traditional cultural policy to incorporate an industrial policy dimension. This entails a partial move from direct support to more intermediation arrangements with the private sector (OECD 2022; Creative UK 2024; Lindquist 2024). Since the 2000s the early government-related CCI policies and interventions have expanded internationally. Governments have initiated CCI policies and projects to underpin business and industry developments. The approaches and mechanisms have included formal CCI clusters and business and innovation support, including incubation and start-up projects and educational and training ventures to capacitate the CCIs (Lindquist 2024; Haines, Gouws & Lutshaba 2020).

In such developments, there is increased emphasis on economic returns to state expenditure, and expanded roles for private investors. Public funding usually includes direct support by means of grants, and indirect funding through tax relief, and leveraging private finance through mechanisms such as public loan guarantees or matching funds. With the general reduction in public spending on the sector, new approaches, structures, and processes have come into play (Loots et al 2022; Rosenstein 2019).

The nature of public funding is demonstrating a shift from direct funding, such as lump sum subsidies, to indirect funding. One notable example is the reduction in 2018 by the European Council regarding VAT rates on e-publications. This particular measure has the most beneficial effects in supporting CCIs in the EU and helping to boost cultural consumption (OECD 2022).

Further shifts in the nature and pattern of public funding for the CCIs are manifested in the growing promotion of self-employment and entrepreneurship (Antonaglia et al 2024), F, Mizzau, L, England & Schieb-Beinfait, N (2024). Trade fairs, export promotion, founder loans, and business advice are being deployed increasingly at national and sub-national levels. There is a growing provision of incubation and start-up programmes, initiatives by national and sub-national economic development agencies, and some national departments for commercial CCI entities. A related development is the emergence and expansion of governmental venture capital funds which have the potential for generating financial returns and socio-economic benefits as well as local and regional economic development (Lee 2022). South Korea is one of the pioneers of such an approach, and as Lee notes, the government's use of venture capital as a "state-led regulated financialization" project has reconstructed, expanded, and 'tamed' the cultural venture capital market (Lee 2022). There are signs of increasing collaboration with networks of financiers, private investors, foundations, banks, and private venture capital firms to equip local entrepreneurship ecosystems (OECD 2021; Loots 2022).

Next, the boundaries between public and private support for the CCIs are blurring, which can be seen in several kinds of current funding instruments, thusly combining the features of a debt, grant, and equity financing (Loots et al 2022; OECD 2022). One noteworthy example is that of government venture capital funds (GVC) that use a mix of public and private funds and are often described as hybrid funds. Such funds can also be termed co-investment funds or governmental limited partnership programmes (Loots 2022; OECD 2022).

Partnerships have also become an established policy priority for the CCI over recent years and are likely to become more significant going forward. They can be accompanied by similar processes and capacity building, such as the construction of networks, and the fostering of cooperative and collaborative endeavours (GIZ 2024). Partnerships are in evidence in CCI activities globally, and incorporate actors and agencies at global, macro, meso, and micro levels. They can be operational within a sector or function cross-sectorally. Such partnerships may also involve differing state agencies at different levels of government from national through to local. Increasingly, they function on international levels, including with multilateral or bilateral organizations (OECD 2020; UNCTAD 2024).

Crowdfunding has become, in a relatively short space of time, an alternative and substantive means to raise private investment for CCI projects. The main crowdfunding models are four-fold: equity-based, reward-based, lending-based, and donation-based forms (OECD 2022). Newer variants are likely to emerge. Donation and reward-based forms of crowdfunding lend themselves to CCI projects, while equity and lending-based models are more suited to organizational funding Cicchiello, Gallo. & Monferrà 2022). Crowdfunding is not likely to substitute for public funding of the CCI, but rather co-exist. Although crowdfunding is providing an increased additional and alternative funding supply, its contribution to the financial ecosystems of the CCI is still modest. There is also evidence that in some instances crowdfunding is more substantive when there is increased involvement of public agencies in promoting CCIs (Cicchiello, Gallo. & Monferrà 2023).

Recent scholarly work raises the question of whether a new funding paradigm is evolving, with a blurring of the boundaries between public and private in terms of the agents, agencies and the modes of financing (Loots et al 2022; Martel 2020). This new paradigm includes collaborative means and mechanisms of funding such as the aforementioned crowdfunding, incubator and accelerator finance, and other pooled investments. It also entails digital fundraising technologies and techniques that accommodate new kinds of tokenized funding and asset finance. Platforms that are geographically dispersed and accessible and reflexive markets will also be important to collectively validate and promote global trade (Loots et al 2020; GIZ 2024; Jeary & Brawley 2024).

The geography and the dispersal of CCIs and activities looks set to become a growing policy and associated funding emphasis in the second half of the 2020s (e.g. Jeary & Brawley, (2024;

Creative UK 2024). In OECD countries, CCIs tend to concentrate in larger cities and capital regions (World Bank 2018). Places with established and vibrant cultural and creative scenes and activities, most particularly large cities, provide a potentially favourable setting for the CCIs' smaller firms, while its workers and practitioners can share resources and knowledge (Creative UK 2024; OECD 2022a). Ultimately, CCIs can play a critical role in city revitalization and growth. However, a city's ability to create a CCI-enabling environment depends on the responsiveness of local governments and their creative coalitions (World Bank & UNESCO 2021). There are thus significant variations in the capacity and enabling factors of decisionmakers and funders to boost economic growth and development through a leveraging of the CCIs (World Bank & UNESCO 2021; Haines & Lotter 2023).

Sub-national and local governments remain a key source of financial support to CCIs. While a reduction in direct spending by governments on CCIs is taking place at sub-national and national levels, financial modes of support mechanisms are likely to include more emphasis on support schemes for artists an creatives, and an increased diversity of direct and indirect measures including direct grants, tax deferments and subsidized loans (OECD 2022; World Bank & UNESCO 2021; GIZ 2024).

Globally, creative cities have generally been expanding and diversifying their direct public funding and resourcing to support cultural and creative spaces, creative initiatives, and relevant networks and entities (World Bank 2021). Some cities can provide indirect support through legislative measures to improve the opportunities for investment from differing sources (ibid.).

Where public funding and support can play a vital role in CCI initiatives and promotion at local or micro levels in cities and urban environments is assisting with and/or helping to procure or provide 'cultural spaces'. Such spaces are both discursive and actual sites that include the notion of 'creative placemaking' (Whiting et al 2021; UNESCO 2022c). They can include 'third places', makerspaces, co-working sites, incubators, accelerators, 'fablabs', and even hackerspaces and garages (Martell 2020; UNESCO 2021c). Such spaces can underpin creative work and output and help catalyse innovation, collaboration, and interplay with other artistic and creative sectors (Whiting 2021; Martell 2020.). In addition, cultural spaces such as museums, music ventures, and music studies can assist cities in rebranding themselves and rejuvenating their centres. (GIZ 2024; UNESCO 2021c; Whiting et al 2021).

In terms of spending by constituted authorities at regional and supranational levels, the percentage of spending on CCIs is down (GIZ, 2023), but there are some encouraging developments. For instance, in 2016, after some years of pressure and persuasion, the European Commission established a capacity-building scheme which was aimed at bolstering the abilities of banks to lend to small CCI entities. The scheme entailed a special fund – the Cultural and Creative Sectors Guarantee Fund (CCS GF) – to guarantee loans made by a dozen banks from ten participating EU countries. The Fund is administered by the European Investment Fund (EIF) and provides a capped portfolio guarantee for loans to creative and cultural enterprises (KEA 2019). Another example is the IFC (International Finance Corporation) which has institutionalized pre-investment support for the CCI by helping to ensure that early-stage project development is bankable.

The Global Project CCI has developed a web-based training programme (or e-learning course) on strategic aspects and mechanics to address this shortcoming. International DC institutions are encouraged to utilize the programme to reinforce their efforts for CCI professionals, practitioners, and firms (GIZ 2024).

Case Study: Navigating Challenges and Opportunities in the UK's Cultural and Creative Industries

Worldwide, the UK's Cultural and Creative Industries (CCIs) are known for their innovation and their economic and cultural contributions. However, as outlined in the 2024 Horizon Scanning report by Lois Jeary and Simon Brawley, this sector is also characterized by funding restraints, workforce insecurity, and disparities in regional development (Jeary and Brawley (2024).

Public funding for arts and cultural organizations in the UK declined by 18% from 2010 to 2023. In reaction to this decrease, many CCI organizations increased their reliance on alternative funding sources, such as earned income (e.g. ticket sales) and private donations. However, while some institutions were able to successfully diversify their revenue sources, others, especially smaller community venues dependent on local authority funding, have struggled. In 2023-2024, 32% of UK museums reported a reduction or complete termination of local authority support. This has placed grassroots spaces, which are important for talent development, into jeopardy. While there are proposals to protect these organisations, such as an industry levy for the music sector, additional policy interventions are still needed.

The CCI workforce challenges mirror these structural changes. In 2023, the percentage of self-employed jobs in the creative sector and cultural sector was 28% and 50% respectively, compared to the national average of 14%. Although this freelance status gives creatives a flexibility, many workers have to deal with precarious conditions, including limited access to employment benefits, pensions, and social security. As a result talent retention is becoming a growing concern because workers are leaving the sector. The Horizon report suggests measures be implemented to prevent this, such as appointing a Freelancers' Commissioner and exploring universal basic income to tackle these inequalities.

Influenced in part by the impact of C-19 on the CCIs, there has been an expansion in recent years of basic income schemes for creative and cultural workers and practitioners (O'Brien & Clancy 2022). There has also been a growth in guaranteed-income schemes for creative and cultural practitioners since the early 2020s. By this time in the USA, over 200 such initiatives has been noted (O'Brien and Clancy 2022). In some developing countries such as Argentina, artists have established social protection schemes through their professional associations, unions, or other non-profit organizations. These modest ventures allow artists to explore alternatives and to respond to the absence of or the ineffective management of public social protection interventions (O'Brien & Clancy 2022).

6.4 Cultural and Creative Leadership

Cultural leadership, at least in its early iterations and definitions, can be described as "the act of leading within the cultural sector" (British Council 2013).

Cultural leadership has a wide range of applications, which include:

- Leadership in subsidized ACH organizations in the public space, senior officials in government structures tasked with cultural policy and associated executives and officials in relevant policy processes.
- Firms and organizations in the private sector focussing on cultural production and cultural economy, as well as industry associations.

Many of the challenges that cultural leaders face are similar to those faced by leaders in other kinds of organizations and business. These can range from financial issues and digitalization through to measures to improve the environmental sustainability of the organization and its work.

In the early 2000s the Clore Duffield Foundation, with supplementary assistance from external donors, set up a new initiative that could offer leadership development for the cultural and creative sectors, customised according to "the needs, circumstances, aspirations and potential of exceptional individuals" (Bacon 2024). The Leadership programme became the touchstone for a variety of cultural and creative leadership programmes (Bacon 2023). By the late 2010s the CDF CL initiatives had branched out with more bespoke courses on aspects of cultural leadership as well as joint and collective ventures in the field, including on international levels.

For instance, in 2016 the Advanced Cultural Leadership Programme, which was described as the first cultural leadership programme in Africa, was developed and introduced by the University of Hong Kong in partnership with the Clore Leadership Programme (HKU 2016). The one-year programme was comprised of two five-day retreats, a two-day non-residential course, and interspersed with select lectures and seminars. Programme participants were also allocated tasks aimed at developing their leadership capacities for which they reported back at the end of the programme year. Selection required applicants to have at least five years' experience of working in the cultural sector.

Separately, the Hong Kong Arts Development Council (HKADC) has collaborated with the Clore Programme in establishing a Hong Kong Scholarship linked to the Clore Fellowship Programme. The Scholarship programme looks to nurture and enhance local arts and culture management capabilities and creative talents to develop future leaders to "innovate for the greater good of the society" (HKADC 2022; HKADC 2024).

The Global Cultural Leadership programme was launched in late 2016. It aimed at developing and strengthening cultural leadership capabilities of young creative workers. Its primary focus was on improving the skills of cultural managers and develop peer-to-peer learning and networking. This would allow the learners to gain insights into international cultural collaboration approaches and practices at a global level, and for EU participants, at regional level (EU 2016). The initial version of the training programme included 40 emerging cultural practitioners (30 selected from strategic partners of the EU, and 10 EU-based peers) to train and develop on a peer-to-peer learning process, and gain new cultural leadership skills for operating and cooperating within a global working context (EU 2016).

During 2020, the Cultural Diplomacy Platform – designed to help enhance EU cultural cooperation with third countries – was restructured and became the Cultural Relations Platform. At the same time, the GLCP became the Global Cultural Relations Programme (GCRP), "mirroring a slight change in the learning approach focussing on building strong relationships and peer-to-peer learning" (EU 2022). The GCRP fosters and develops cultural professionals' skills and supports their engagement in international cultural relations through tailored learning, cross-cultural collaboration, and global networking. Since its launch in 2016, GCLP/GCRP has built a community of over 260 professionals from six continents and amongst different cultural and creative sectors. (EU 2024).

In 2020, the World Economic Forum, in collaboration with artist Lynette Wallworth and with support from the Ford Foundation, launched the New Narratives Lab, a year-long leadership fellowship for artists aimed at "fostering a new and diverse generation of cultural leaders" (Daswani 2020). Via one-to-one mentorship with relevantly experienced members of the WEF's network of cultural leaders, Fellows from under-represented communities would be enabled to utilize the Forum's resources "to navigate circles of power and decision-making, create valuable alliances, learn how to make their voices heard and bring about change". However, the question of improving the management and finances of cultural and creative organizations was no longer the prime consideration. For the WEF, these Fellows would 'help us reshape the world 'through their alternative and creative inputs and networking (ibid.).

A distinct trend that emerged during the late-2010s and early-2020s was the establishment of University-oriented programmes and initiatives. The bulk of such interventions were at post-graduate level. One of the more prominent of these developments was the launching by Maastricht University (Netherlands) of an Executive Masters in Cultural Leadership which was developed in partnership with the Royal Academy of Arts in London. The programme sought to inculcate a "new generation of leaders" who would import a deep-rooted understanding of culture and creativity into their businesses and institutions. It also sought to develop world-class leaders intent on reshaping the arts and cultural sectors and applying innovative and sustainable business approaches and practices. A new Creative Leadership Programme (CLP) by Creative Australia of the Australian national government is another recent example of such programmes (CA 2024).

South Africa has a modest record regarding identifying the need for cultural leadership enhancement and training over the years. Although there were opportunities for participation on the mainstream international Cultural Leadership programmes, most particularly the Clore Cultural Leadership Fellows (FFN 2018), and the Global Cultural Leadership Programme (SACO 2017 c), no institutionalized local variant of such programmes was developed and implemented in South Africa in the 2010s. In terms of relevant HEI-led cultural leadership programmes, the eponymous post-graduate Honours, Masters, and Doctoral programmes of Wits University's Department of Cultural Policy and Management provided coverage of policy and management aspects of the CCIs. However, the scope and content of the taught programmes were more generalist in nature, and the selection criteria drew on a broader pool of applicants (cf Wits 2024).

However, in recent years there has been a distinct uptick in initiatives and thinking regarding the fostering of cultural leadership and embedding such interventions within the CCIs as well as global networks. For example, in September 2021, VANSA (Visual Arts Network of South Africa) opened a call for applications for VANSA's Cultural Leadership Programme with a stated intention of supporting "the next generation of cultural leaders in the Arts". The five-month programme was a mix of workshops, mentorship, peer-learning, and interaction with industry leaders. Career planning and professional skills development were also part of the programme (VANSA 2021). Although there was no follow-up cohort, and the programme was subsequently shut down, there are some continuities between the 2021 VANSA offering and a new multi-agency initiative, the Cultural Producers Programme, which was developed in 2022-23. This cultural leadership development intervention is presented by the British Council and Business Arts South Africa (BASA) and supplemented by Common Purpose SA and the Pan African Creative Exchange Programme (BASA 2024).

7 Demand Side and Cultural Consumption Trends

7.1 7.1 Digital Cultural Consumption

One of the most prevalent trends in the demand for cultural goods and services is online consumption. While this was already growing significantly before 2019/20, the COVID-19 pandemic forced many cultural institutions to greatly expand their online offerings, particularly those linked to tourism, like museums and festivals.

Research has found that, before the pandemic, cultural online entertainment was mostly linked to listening to music, watching films and posting pictures. However, during lockdown, online activities became much more varied, including reading, visiting cultural organisations' websites, and going on virtual tours. This applied even to those who did not substantially increase the amount of time they spent on the internet. "The concept of cultural entertainment gradually shifts towards more and more proactive activities" (Bonel, Capestro, and Di Maria 2023).

Table 5. Online cultural consumption activities before and during the C19 pandemic

	Pre-Pandemic	During & After Lockdown
High online time	**Activities during online visits** -Looking for information **Exploring the collection** -Browsing	**Activities during online visits** -Taking virtual tours -Watching videos **Exploring the collection** -Reading collection description -Following a guided digital tour **Attributes liked during the visit** -Learning/involving experiences -Features of online experiences -More time to enjoy the collection **Motivation for visiting** -Interesting -Digital activities
Low online time	**Activities during online visits** -Looking for information -Playing games **Exploring the collection** -Browsing -Following a guided digital tour	**Activities during online visits** -Taking virtual tours -Perusing & reading about the collection **Exploring the collection** -Reading collection description -Following a guided digital tour **Attributes liked during the visit** -More time to enjoy the collection **Motivation for visiting** -Digital activities on website

(Bonel, Capestro, and Di Maria 2023: 154)

There is considerable debate as to whether online or virtual museum exhibitions, usually offered free of charge, are a complement or a substitute for visits to the physical museum. Virtual tours can include a wide variety of content, such as videos, 3D images, sounds, and even virtual or augmented reality. Some commentators argue that virtual tours are a helpful supplement to physical museum visits that can provide prospective tourists with useful information about their visit and encourage a greater level of engagement, and result in more time (and money) being spent at the physical museum. This may particularly be the case for lesser-known collections (which Geng (2023) refers to as "hidden gems").

However, very high-quality virtual exhibitions may, for some visitors, act as a substitute for physical museum visits. That is, online information and experience satisfies their desire for engagement with the museum's collection, and thus replaces a physical visit. This also depends on the "perceived equivalence" of the physical versus the online museum experience on the part of potential visitors. Geng (2023) cautions that more advanced virtual tours are more likely to be seen as adequate substitutes for the physical visit: "While free lower-grade virtual tours can promote physical tourism, they eventually impede physical tours once they improve to a high enough grade" (Geng 2023). The author thus urges museums whose business model relies on physical visitors to act cautiously when considering offering high-grade virtual tours for free.

Despite this, online resources can also enhance physical museum visits, and thus increase cultural capital, and therefore demand for physical visits. In most museums, only a small part of the collection is on display, so complementary online information can allow visitors to explore more of the collection, including from the museum archives, allowing them to engage more deeply with the content. Visitor activities and "movements" in such online spaces can also be tracked, providing curators with valuable information about how museum visitors prefer to explore the exhibits (Meinecke, Hall, and Jänicke 2022).

Museums can also use technology to enhance visitors' physical museum visits. Many museums have audio-guides available, for instance. Now, using the Internet-of-Things and AI, museums can use technology to personalise museum visits for each individual visitor. An app can be used to determine the user's location within the museum and provide information and personalised recommendations to help visitors manage the "information overload" that many experience during museum visits. The app also tracks user behaviour, which can be later used to design more user-friendly movement sequences for the museum that increase visitor satisfaction with their visit and encourage them to come back (Javdani Rikhtehgar et al. 2023).

Online consumption can also aid in reaching non-traditional audiences who may not have otherwise engaged with the museum, helping to develop a relationship between visitors and museums, and overcome limitations such as distance and mobility. A study of younger people (1000 "generation Z" university students in Italy) who are known to be reluctant to visit museums showed that, during the pandemic, this group's "pro-museum" consumption behaviour increased in the online space. "Our study points out that the pandemic has modified their attention towards cultural consumptions, also in terms of a more pro-active role, with changes in their behaviours that could persist over time" (Bonel, Capestro, and Di Maria 2023). The authors argue that integrating physical and online experiences could be an important way for cultural institutions to expand their audiences and reach.

Like museums, many cultural festivals also moved online during the pandemic. A SACO (2021) study found that, for most festivals in South Africa, the move to online delivery was survivalist rather than a planned expansion or marketing strategy. Initially, festivals had some success in retaining their audiences, but had trouble monetising the content given how much online content was available for free. Respondents to the online survey about festival consumption reported very low levels of spending in the study period (March 2020 – March 2021), with nearly a third of respondents having spent nothing in this period.

As the results demonstrate (Table 6), online access did provide some benefits, as in the case of museums as well. In particular, online participation increased access (at least for those with internet) and may have encouraged wider exploration of the content. However, many people missed the social aspect and "vibe" of the live event. This is substantiated by recent research on the tactile value of live music performance, defined by the authors as a sub-category of social value. The study gathered information from young European festival and concert-goers on their experience of live events. The findings showed that tactile value (that is, the shared physical closeness to other people taking part in the event and the energy of the crowd) positively affected the experience of participants (Radermecker and Angelini 2024).

Table 6. Audience experiences of online events

What did you enjoy about online events?	%	What did you not enjoy about online events?	%
Being able to participate from my home without having to travel or go out	54	The excitement and "vibe" of going to a live event was missing	78.5
Being able to move quickly and easily between different shows and events	25.4	I struggled to use the technology needed to access the online events	4.6
Not having to dress up and go out to see shows and events	12.7	Not being able to travel to a venue and experience a new place	40
Keeping in touch with artists and performers	44.4	Not being able to socialise with friends and other people attending the event	61.5
Having to pay less for tickets	15.9	I missed the sense of connection to the performers and artists that you get at a "live" event	66.2
Interacting with other people online through things like "comments" and "chats"	12.7	Not being able to experience the food and drinks on offer at live events	26.2
Having access to shows and events that I would not normally be able to attend	54	Other: quality of sound and visuals	10.8

(Source: SACO, 2021: 26)

Some festivals, like the South African National Arts Festival and the Klein Karoo Nationale Kunstefees, invested significantly in their online platforms and have continued with a hybrid approach as a way of augmenting the in-person experience (Snowball et al. 2023).

7.2 The Role of Social Media and User-Generated Content in Shaping Demand

An important change in the way that goods and services are marketed is through social media influencers. The global influencer market size for 2023 was US$21.1 billion, more than three times its value in 2019[31]. Social media platforms, such as Instagram, TikTok, and Facebook, are increasingly important platforms on which consumers look for recommendations and follow trends. In January 2023 TikTok had over one billion monthly active users, and the most popular influencer, Khabane Lame, a comedian based in Italy, had 162.6 million subscribers. In areas of the creative industries, like fashion, there has been a move away from traditional marketing activities towards social media and influencers (with their sometimes large groups of followers) which can play an important role here (Vladimirova et al. 2024).

[31] https://www.statista.com/topics/2496/influence-marketing/

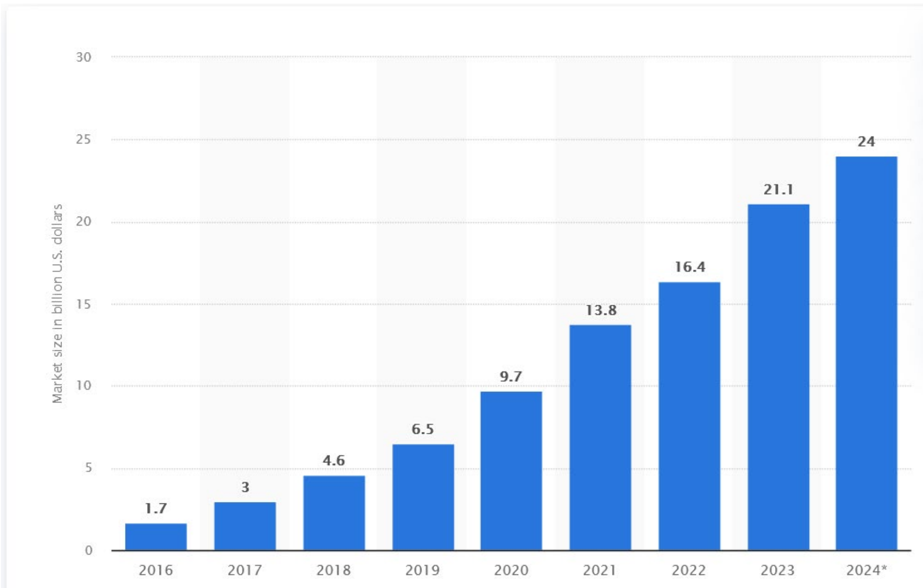

Figure 21. Influencer Marketing market size worldwide

(Source: Statista, 2024)

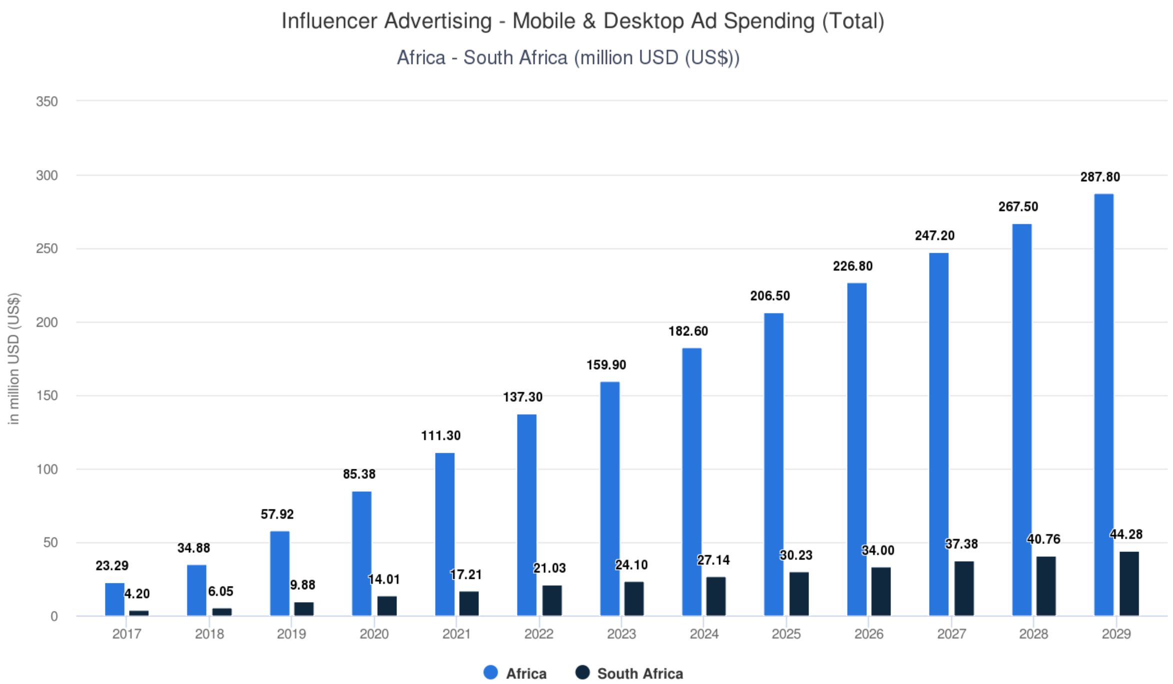

Figure 22. Influencer Advertising Spending in Africa and South Africa

A study of the relationship between social media activities and demand (ticket sales) for live theatre showed that social media can be a powerful and influential form of "eWOM" – electronic Word Of Mouth (Baldin et al. 2024). Live performing arts have traditionally suffered from information asymmetry: that is, it is difficult for potential audience members to know in advance if they will like the show (quality measures), and it is also difficult for producers to predict demand. Quality indicators can come from objective facts about the show (the author, actors, director etc.), from subjective professional reviews, and from the opinions of family and friends. In this last category, Word of Mouth (WOM) has been shown to be a powerful influencer. Social media and eWOM can amplify traditional, in-person opinion data and make it easier for both consumers to collect data about the show in advance, and (potentially) for producers to use social media opinions to predict demand.

eWOM is faster and more effective than in-person WOM, since it is quicker and easier to access. A study of bookings data for the Royal Danish Theatre and activity of their official Facebook page from 2010 to 2016 showed this relationship: the number of Facebook "likes" had a positive and statistically significant relationship with the number of theatre tickets sold. The authors conclude that "Facebook likes have an influencer role as a signal of quality for consumers, leading to an increase in the amount of tickets sold" (Baldin et al. 2024: 218).

An area where social media is particularly powerful is in fashion. eWOM can help to generate a brand image, brand awareness, and brand loyalty. Consumers of a particular fashion brand, as well as influencers with many followers, generate content like product reviews which can provide both information about the brand as well as build a lifestyle image associated with it. Creators of "User-Generated Content" (UGC) may be doing it as part of being connected to an online community (staying updated and connected), or for fame and (in the case of paid influencers), money.

UGC has become an important part of the creative economy digital landscape, mainly disseminated through social media platforms. In 2024, social media penetration had reached 62% globally, with the total number of users expected to exceed 6.05 billion by 2028 (Industry Report: Social Media & User-Generated Content, 2024[32]).

YouTube is the most used UGC platform, recording 32.5 billion visits in March 2024, followed by Facebook with 16.1 billion and Instagram with 7 billion. Short-form video content on platforms like TikTok, which had 1.3 billion users in 2023, is also increasing in popularity amongst young consumers (SimilarWeb, 2024).

Social media influencers thus have large audience reach, and are increasingly being recognised as opinion leaders who can change the purchasing behaviour of their followers (Vladimirova et al. 2024). A study of fashion influencers in 38 countries in 2019 found that 86% of them had purchased clothes or fashion accessories after seeing them on another influencer[33].

7.3 Environmental Sustainability and Ethical Consumption

In the face of global climate change consumers are becoming more environmentally conscious, and are starting to demand that suppliers of cultural goods and services take their environmental impact into account as well.

One of the most visible areas is fashion, and particularly "fast fashion", which produces low-quality clothes designed to be worn only a few times. Examples of global fast fashion firms are

[32] https://www.statista.com/markets/424/topic/540/social-media-user-generated-content/#overview

[33] https://socialpubli.com/blog/2019-global-fashion-influencer-study/

Zara and Primark, as well as online retailers like Shein (Zanjirani et al. 2022). Fashion generates a large amount of waste, both in terms of fabric production, and in terms of clothing items that are no longer wanted. According to a UN source[34], the clothing and apparel industry consumes more energy than the aviation and shipping industries combined and is responsible for 8% of carbon emissions worldwide.

Growing awareness and concern for more responsible consumption has led to campaigns by Fashion Revolution with their slogan #WhoMadeMyClothes, whose main aim is to "end human and environmental exploitation in the global fashion industry" by encouraging consumers to ask questions about the supply chain of companies they buy from[35].

Part of the movement is linked to ideas of the circular economy, which advocates adopting more sustainable production and consumption methods. Some companies, like H&M, which has branches in more than 53 countries, have responded by launching high-profile actions, such as "Conscious Action", which considers each stage of the fashion supply chain, encourages customers to return clothes they no longer want to garment collection points, and aims to use more recycled inputs[36].

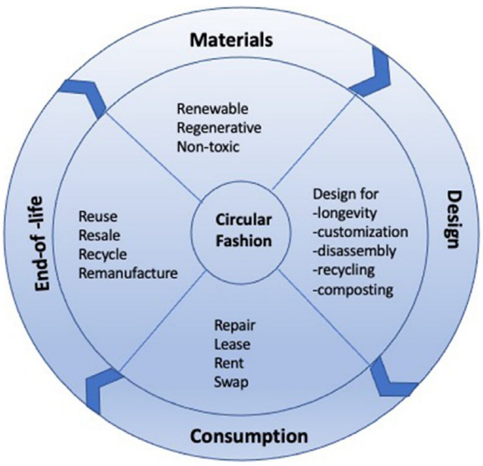

Figure 23. Circular Economy in the Fashion System

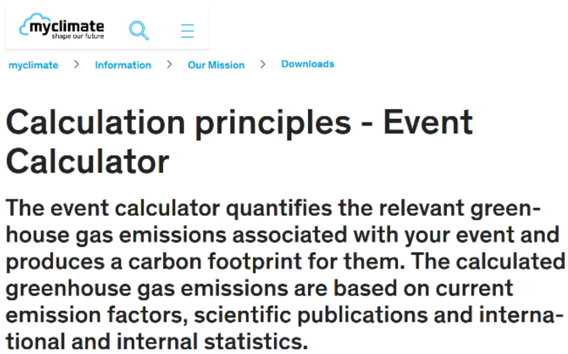

Figure 24. Example of Event Carbon Calculator[37]

Source: (Dissanayake and Weerasinghe 2022)

However, there are challenges with implementing sustainable fashion. Some stem from the supply side – the cost and difficulty of recycling used garments for example, but also a lack of customer interest (Abbate et al. 2023). In South Africa, research shows that although fashion designers may be interested in more sustainable models, such as minimising water use,

[34] https://www.un.org/sustainabledevelopment/blog/2019/08/actnow-for-zero-waste-fashion/

[35] https://www.fashionrevolution.org/about/

[36] https://www.hm.com/za/customer-service/sustainability/sustainability/

[37] https://www.myclimate.org/en/information/about-myclimate/downloads/event-calculator/

reducing chemical dyes, and reducing waste, consumers are more budget-constrained and less educated about environmental income, and thus less willing to pay for the higher price for sustainably produced, better quality garments (Gatawa 2022).

Cultural tourism is another area where visitors, even in developing country contexts, are starting to worry about their environmental impact, which is related to things like visitor travel, energy use, use of plastics and paper, and waste production.

The carbon footprint method can be used to calculate additional carbon dioxide produced from an event and used to track reduction over time, and investment in carbon offsets. There are online tools that festival organisers can use to calculate their carbon footprint such as the Carbon emissions calculators for events.[38] The International Standard for Sustainable Event Management (ISO20121)[39] also provides guidelines and measures for the environmental impact of various kinds of events.

Most environmental impact studies of festivals and events focus on reducing the local impacts on the host city, such as reducing waste, energy consumption, and noise and light pollution. The Hay Festival used an ecological footprint method to calculate how many "global hectares" would be needed to offset the total environmental impact of a festival (that is, to sequester carbon emissions, process waste etc.), thus going beyond the focus on the festival host area (Collins and Cooper 2017).

The updated South African Festivals Economic Impact Calculator ($SAFEIC_{2024}$) developed by SACO (2024) also includes ways for festivals to report on and track environmental initiatives implemented, which can affect their own policies, the choice and behaviour of suppliers, and marketing to environmentally-conscious visitors.

A visitor survey at a Lithuanian music festival (Kačerauskas, Streimikiene, and Bartkute 2021) found that festival-goers were interested in the ways in which organisers were paying attention to environmental sustainability issues. The respondents were asked if the application of the principles of sustainable development is important when choosing which music festival to attend. 48% of surveyed visitors thought that organisers should "adhere to some principles of sustainable development" and a further 25% felt that organisers should "adhere to the principles of sustainable development to the maximum." The authors conclude that in the future, festivals will need to apply sustainability criteria in order to attract more visitors (Kačerauskas, Streimikiene, and Bartkute 2021).

8 Online Focus Group Results: What South African CCI Stakeholders Think

Three of the main trend areas identified were included in the FGD:

1. Techno-Economic Trends, including Platforms, NFTs and Blockchain, and Generative Artificial Intelligence.

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[38] https://www.myclimate.org/en/information/about-myclimate/downloads/event-calculator/

[39] https://www.iso.org/standard/86389.html

2. Creative Work and Labour Market Trends, including the gig economy and freelance work, industry associations and networks, and hybrid and online work
3. Demand side and Cultural Consumption Trends, including the rise of online consumption and activities, social media influencers and user-generated content, and environmentally sustainable and ethical consumption.

The research group briefly presented each group of trends, after which participants were invited to complete an online poll, rating the importance of each trend for the cultural and creative industries in South Africa as: very important, some impact, or less important. Poll results were then shared with FGD participants, and an open discussion was held. Participants could join the discussion by raising their hand and speaking, or by typing their thoughts into the comments section.

The FGD was advertised via the SACO social media sites and newsletter and took place on the 27th of November 2024. Excluding the research team, about 15 participants joined the discussions. Results will be reported anonymously, as stipulated in the Ethical Clearance (Ethics Approval Number: 2024-8140-9115), but participants included practitioners from various parts of the South African creative industries, including the live performing arts, broadcasting and media, arts administrators and talent development agencies, and other CCI researchers.

The purpose of the FGD was not to provide statistically significant or representative results, but to start to gauge the opinions of some South African creatives on the importance of the CCI economic trends identified through the research presented in the first sections of the report.

Techno-Economic Trends

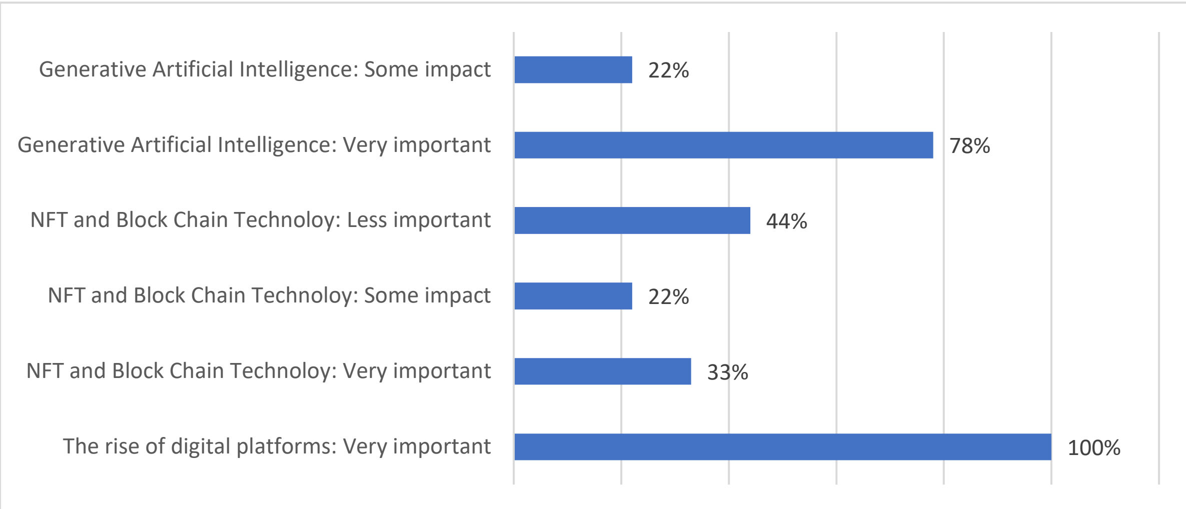

Figure 25. Focus Group Discussion of Techno-Economic Trends

All (100%) of participants rated digital platforms as “very important” for the CCIs in South Africa, indicating that this trend warrants further research and support. In discussion, platforms were mentioned as a great opportunity for the CCIs in South Africa and in Africa generally, but only if reliable and affordable internet access could be achieved, otherwise the danger is that the digital divide would deepen inequality.

One participant also raised the idea of developing of our own platforms as a way to retain control of the market, although acknowledging the difficulty of competing with multinational companies who already have established platforms:

> "I think the larger platforms have a lot of money to invest and they can develop quite quickly. So, it's going to be difficult to take them on, but I think with some innovation, which the young people have, you can definitely do that."

Another issue raised was that of how to monetise cultural and creative industries content shared on platforms, acknowledging both the opportunity they present, but also the need for copyright law and policy to keep up with new developments:

> "Within the context of performance and celebration, the new revenue streams of downloading and streaming services are really impacting the way copyright law and policy is interpreted in as far as economic exploitation channels open to creators."

> "For me, I was going to say that these platforms have positive and negative impact at the same time. If you look at musicians now, they are cutting out the record labels, the distributors, because they can now upload their content on their own on these platforms. However, when it comes to the revenue and that's been generated, then that's where the problem is."

One participant also linked platforms to the "live" performing arts via streaming, which opens up the potential for new audiences, but again with a caution about how difficult it can be to make such ventures financially sustainable:

> "The State Theatre has also recently embraced the streaming trend, raising the question: to what extent does this guarantee a sustainable income for theatre practitioners, given the low theatre culture in South Africa?"

The next most important trend was Generative AI, rated by 78% of participants as "very important" and by the remaining 22% as having "some impact."

As also found in the recent SACO (2024) report on the impact of generative AI on the creative industries, some participants did voice some worry about the potential of AI to replace certain creative work tasks, but also that in-person interaction cannot always be replaced by online formats, and the need to learn how to harness AI to improve productivity:

> "[Some] won't really be as affected because there's some things that you need to be in the room for, but the people who you are seeing, especially sets and those kind of things, those industries, will be highly impacted, because those things can be done by machines in a fraction of the time, and so those people would need to upskill or re-skill themselves in order to be relevant in the future."

NFTs and Blockchain Technologies were seen as "less important" by 44% of participants, having "some impact" by 22%, and "less important" by 44%. Discussions revealed that this was partly because many CCI practitioners did not yet know very much about these technologies.

An FGD participant, who introduced himself as an arts administrator, made the point that creatives also recognise that they need training to access and use platforms and other technologies that affect the CCIs:

> "There is also a rise in requests to access new tech for production, rather than content or creative-based assistance. There is also a rise in requests for skills development-based assistance in the form of educational sector master classes."

Creative Work and Labour Market Trends

The creative work trend considered to be "very important" by all FGD participants was Hybrid work and "Zoom towns" (that is, the location of creative workers in smaller towns and cities where they can use technologies like Zoom to continue to work remotely).

One participant explained the hybrid work trend as way of managing uncertain incomes related to many parts of working in the creative industries, as well as using the online space to connect with people they may not have access to in-person only:

> "In relation to hybrid work, I think creatives are finding it a bit more manageable in terms of finances and because of the freelance nature of creative work. If they have to move to a creative hub [city], in which the cost of living in those places tends to be higher... they don't have to live, let's say, in the city centre, where it'll be quite pricey to stay, [and] where they have to spend a lot of money getting to work, doing work."

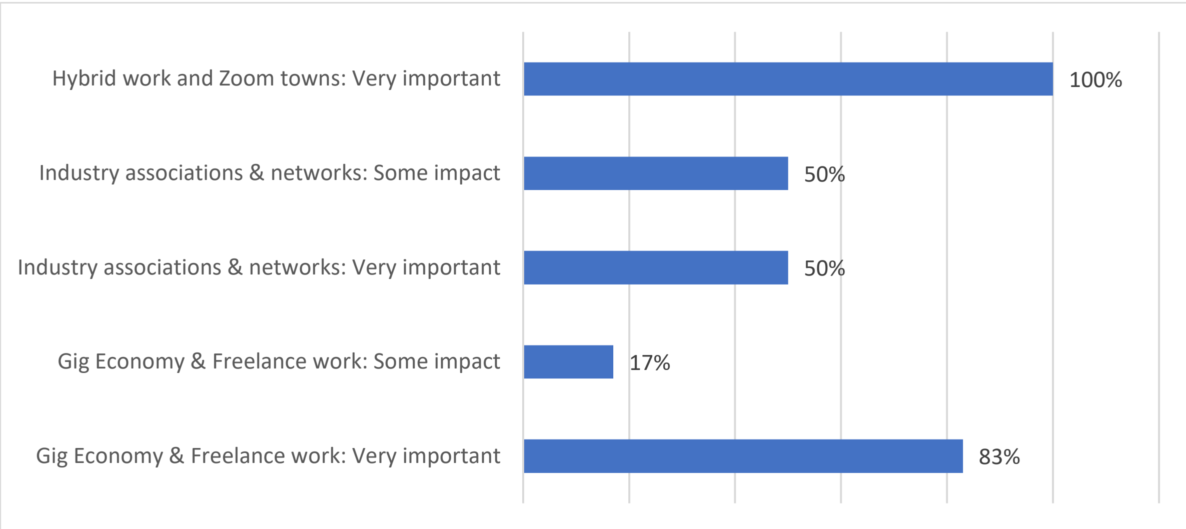

Figure 26. Focus Group Discussion of Cultural Work and Labour Market Trends

Another participant commented that, especially for the digital creative economy,

> "Digital creation work can be done from anywhere. With Globalisation, this is practical and necessary to save costs."

The rise of the gig economy and freelance work (as compared to standard permanent employment) was rated as a "very import" trend by 83% of participants, and (as in the previous comments) was linked to hybrid work and the management of finances:

> "Because of the nature of freelancing, you don't have a fixed salary every month, and perhaps that's why people are bleeding more into hybrid working or working remotely

> and doing it on Zoom, because not only are you kind of working around the problem of cost of living, but you can also access more people in that way."

Despite the acknowledged difficulty of freelance or gig working, one participant also recognised the opportunities that this kind of work provided, especially when linked with online and hybrid working:

> "From my own perspective, I think a gig economy allows for more access to work opportunities and to be able to spot opportunities, not only within the environment, but to insert myself into spaces where there's opportunity to offer my services, for example. So, the gig economy helps in that way."

There were mixed opinions about the importance of industry associations and networks, with 50% of FGD participants rating them as "very important" and the rest "some impact". One participant pointed out that creative hubs, sometimes also called co-working spaces, could be useful for keeping the costs of digital work down, as well as for networking and collaboration, particularly with regards to accessing private funding:

> "The cost of participating in the digital economy is actually expensive, the software and the hardware, it's expensive. So, the creative hubs and those kinds of spaces offer more access. But I also then think that with that, there's a need for the collaboration with the networks, the private sector and the funding. So, I think that's where the opportunity lies for me, because I think everyone is working in silos in a rush to get a piece of the economy, but there's also more opportunity for collaboration and centralizing and streamlining. There's just a lot happening. There's too much information, and no one knows where to go. So if you find like-minded people talking about the same things, it makes it easier."

Demand-Side and Cultural Consumption Trends

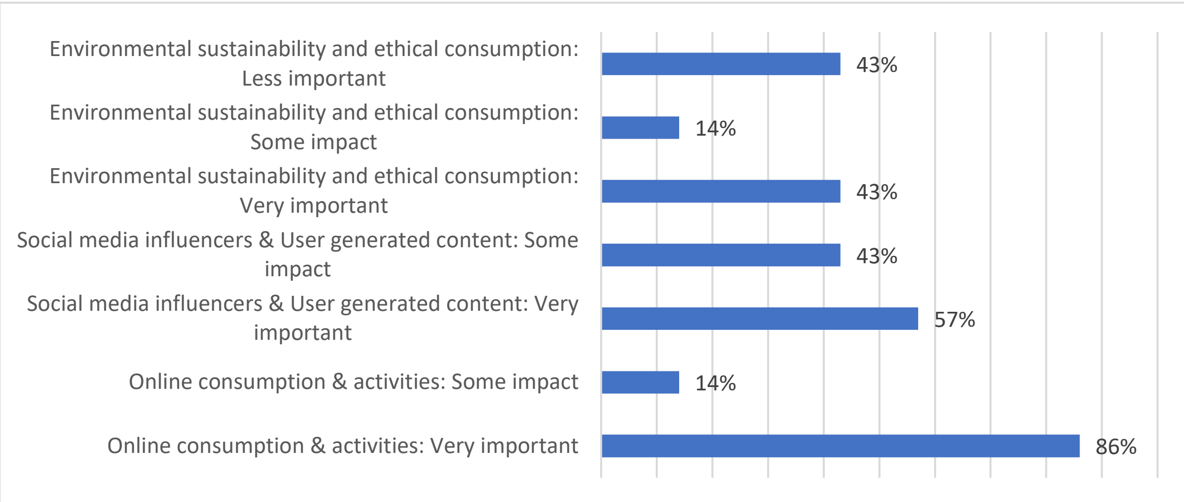

Figure 27. Focus Group Discussion of Cultural Consumption Trends

In terms of demand-side trends, the rising importance of online consumption and other online cultural activities was rated as "very important" by 86% of FGD participants, with the rest rating it as having “some impact”. For a large part of creative industries, online consumption is thus expected to be an increasingly important trend.

For one participant, online consumption is a key driver in improving access and reaching audiences who may not be able to participate in-person:

> “For the music and performance space, in as far as consumption, and online consumption in particular, there's a lot that is positive for creatives. [Some] broadcasters are involved in a big project that has got a channel online that basically brings festivals that one would not necessarily be able to attend, you know, all over the world, and brings this content into your living space, in your living room, in your TV space. So, as far as that is concerned, there's a much broader playing ground in as far as a content that can reach people in the form of festivals that would not naturally be able to be accessible because of things like distance, but the technology has been able to change those spaces.”

The role of social media influencers and user-generated content was rated as “very important” by 57% of FGD participants, with the rest rating it as having “some impact”. In particular, several participants discussed how social media channels could be used to build interest and audiences before either a live event, or as part of the process of signing a formal contract with a production company:

> “What artists are doing in the performing arts is they are developing the music or movies or whatever they're doing, and they are building an audience prior to having live events, so that they've generated interest. And you've seen a lot of comedians and a lot of seniors who then, after building up a following online, get the more traditional record deal or movie deal and so forth.
>
> That's quite an interesting development where, you know, putting the cart before the horse kind of thing: instead of using the record labels just putting the [content] on YouTube to promote yourself and to get an audience, you do it online, and then they help you kind of formalize it.”

There were mixed opinions about how important environmental sustainability was for CCI consumers in South Africa – 43% rated it as “very important”, but an equal number gave a rating of “less important”.

As found in the desktop analysis, there is interest from creatives in environmental sustainability, as one FGD participant commented: “In as far as environmental sustainability, a lot of ''green artists' are emerging”.

However, as someone else said, the focus for South African creatives (and audiences) is still on keeping costs low: “The funding of both the production and consumption costs is the biggest challenge for SA in my view”.

Section Conclusion

The focus group discussion confirmed that three sets of CCI Economic trends identified through desktop research are also expected to have important impacts on South African creative industries. Participants were very much focused on the impact of online and digital production and consumption, and the opportunities it provides for reaching new audiences, and working and collaborating in new ways.

However, there is also a recognition that monetising content effectively in the online environment, and using some of the new AI tools, will depend on creatives having the skills and protections required to manage these new business models. One participant, who is an arts administrator, cautioned that the online environment could also be exclusionary:

> "In as far as grants adjudication it is interesting that there is a lot of the older generation who can't keep up with the online grant application and submission methods, thus they get marginalised as some are not tech-savvy".

Discussants also acknowledged that lack of internet access for some could deepen the digital divide – not only for creative producers, but for audiences. Despite this, the general feeling seemed to be that digitisation presented important opportunities for South African creatives, although in-person collaboration and networks would continue to be important for the CCI ecosystem of the country.

9 Opportunities and Challenges for South African CCIs

Based on the findings of this report, some opportunities, and challenges for the South African CCIs can be identified from both the perspectives of policy-makers and for creatives themselves.

One of the most important economic trends in the creative industries in the last 10 years has been the increasing use of technology and digitisation. South African creatives acknowledge the potential for these new tools to increase productivity and to reach new markets. Digital platforms were considered especially important in future developments. While the potential of technologies like NFTs and Blockchain, and Generative AI were noted, there are also some challenges in how they could be effectively used by South African creatives. Opportunities offered by techno-economic trends thus depend on the resourcing and upskilling of creative producers themselves, as well as policy support around issues like intellectual property that are crucial to the monetisation of digital creative content. Table 7 summarises some of the identified trends, challenges and opportunities that they offer for the South African CCIs.

Table 7. Techno-Economics Trends: Challenges & Opportunities

Aspect	Trends	Challenges	Opportunities
Digital Platforms	Digital platforms provide global reach and new distribution models for content (e.g., Netflix, Spotify). Increased local commissioning noted.	- Digital divide restricts access due to high internet costs and limited coverage. - Monetisation is challenging due to revenue-sharing models and algorithm bias. - Small platforms face competition from global giants.	- Reach diaspora and international audiences. - Rising demand for African narratives can attract partnerships. - Independent artist models gaining traction.
NFTs and Blockchain	NFTs provide secure ownership and direct revenue for digital/physical creative content.	- High costs and limited technical expertise hinder adoption. - Legal frameworks for smart contracts and copyright enforcement remain underdeveloped. - Market volatility deters creators.	- Direct revenue streams bypassing intermediaries. - Heritage NFTs preserve and monetise cultural history. - Early adoption positions SA as a leader in regional markets.
Generative AI	AI offers applications across ideation, production, and distribution. Reduces barriers but raises IP and ethical concerns.	- Fear of job displacement and IP theft. - Ethical concerns include biases and potential misuse - Technical and skill gaps limit current widespread use.	- Enhance productivity for some parts of creative output. -Reduce barriers to entry.

In terms of creative work and labour markets, the big economic trends for the CCIs relate to the growth of freelance work and the “Gig” economy. The gig economy was seen as empowering younger creatives to diversify income sources, with platforms allowing them to showcase skills globally. However, the COVID-19 pandemic exposed the precarity of freelance cultural work as many creatives were left without support during lockdowns designed to control the spread of the virus. This has, in turn led to the development of some industry associations and networks, globally and in South Africa, which advocate for policy to enable and support “non-standard” labour types.

Hybrid work was broadly welcomed by South African creatives as a way of improving work-life balance and reducing costs associated with dedicated office space. However, participants pointed out the risk of losing spontaneous creative collaboration that often occurs in physical spaces, and the (perhaps increasing) importance of industry networking events. Table 8 summarises some of the main trends and their associated opportunities and challenges for South African CCIs.

Table 8. Work and Labour Market Trends: Challenges & Opportunities

Aspect	Trends	Challenges	Opportunities
The Gig Economy & Precarity	- Rapid growth in freelance and short-term contract work. - Expansion of digital platforms for creative gig work.	- Income instability and lack of social protection. - No guaranteed employment benefits (healthcare, pension, etc.).	- Greater flexibility for creatives to work on diverse projects. - Digital platforms enable wider client reach and remote work. - Potential for policy interventions to improve gig worker rights.
Hybrid & Online Work	- Increased adoption of hybrid work models post-COVID. - Greater integration of digital collaboration tools in the creative sector. - Blurring of traditional workspaces (home, co-working, and digital platforms).	- Unequal access to high-speed internet and digital tools. - Challenges in managing work-life balance in hybrid settings. - Reduced in-person networking and collaboration.	- More job opportunities for remote creatives. - Potential for cost savings on office space. - Growth of online creative communities and collaborations.
Industry Associations & Unions	- Emerging creative industry associations and unions advocating for better conditions. - More collective bargaining efforts in film, design, and music industries. - Push for fair pay and employment benefits for freelancers.	- Many creatives are unaware of or unrepresented by unions. - Some unions lack enforcement power to negotiate strong contracts. - Resistance from large platforms and employers.	- Strengthened advocacy for fair wages and protections. - Increased access to legal support and industry networking. - Potential for policy reforms favouring creative workers.

South Africa's cultural goods and services exports currently make up a very small volume of trade, but new trade agreements (like AfCFTA) are likely to offer access to new markets, especially with partners in the South. Globally, cultural trade is growing faster in developing than in developed markets. The big trend in cultural trade is the shift to services trade as many cultural goods (like books and CDs) move to online delivery platforms. Careful negotiation around Intellectual Property and exceptions for cultural trade (under the 2005 UNESCO Convention for the Protection and Promotion of Cultural Diversity, to which South Africa is a signatory) need to be built into new trade agreements. Table 9 briefly presents some of the opportunities and challenges that arise from the trends in international trade in cultural goods and services.

Table 9.International Cultural Trade Trends: Challenges and Opportunities

Aspect	Trends	Challenges	Opportunities
Diversity in Cultural Trade and Regional Blocs	Cultural trade is growing globally, with regional blocs like the African Continental Free Trade Area (AfCFTA) offering potential for intra-Africa trade.	- Limited size of South Africa in global cultural exports. - Challenges balancing cultural preservation with trade liberalisation.	- AfCFTA opens access to 1.2 billion consumers. - Preferential trade terms for developing countries under the UNESCO 2005 Convention. - Opportunities to showcase African creativity.
Rise in Services Trade as Cultural Products Dematerialise	Services trade (e.g., audio-visual media) is outpacing goods trade as cultural products shift to digital formats like streaming and eBooks.	- Limited digital access in South Africa restricts participation. - Global dominance by developed countries in digital trade. - IP enforcement challenges.	- Growth in digital cultural exports like music, film, and design. - Faster growth rates in developing countries than in developed nations. - Opportunities in creative services outsourcing.
South-South Cultural Trade	Trade between developing countries is rising, supported by regional collaborations and cultural exchange programs.	- Low current volumes of South-South trade. - Limited logistics and trade facilitation between Southern partners. - Lack of visibility for African content globally.	- Enhanced collaboration through regional markets and co-productions. - Stronger ties with BRICS and other Southern trade partners. - Export opportunities in emerging markets.

One of the big trends in managing the cultural economy is that cultural policy now includes both the non-profit cultural sector (funded usually through subsidies and grants), and the creative industries (more in need of industrial policy for innovation and business development). Internationally, public funding for the cultural and creative sector has declined in the post-COVID period, but a new focus on interconnected cultural ecosystems, and the increasing integration of the CCIs into development policies offer potential opportunities. As with other trends, having updated and effectively enforced intellectual property legislation is key to the success of the creative industries. Cultural leadership can be key in supporting the strategic growth and inclusive development of the CCIs in South Africa, and in international markets, but is currently not generally available as a course of study at most South African institutions (see Table 10 for a brief summary).

Table 10.Managing the Creative Economy: Challenges and Opportunities

Aspect	Trends	Challenges	Opportunities
Cultural Policy and Public Funding	Cultural policy now spans arts funding, cultural diplomacy, and innovation-driven economic development. Public funding is uneven.	- Declining public investment globally and in South Africa. - Fragmented policies and lack of institutional coordination.	- Opportunity to align funding with AfCFTA priorities. - Increased focus on cultural ecosystems and local development policies.
Intellectual Property and Copyright	IP and copyright laws are central to CCIs but challenged by piracy, unauthorized use, and digital replication.	- Inadequate enforcement mechanisms. - Gaps in AI-related copyright laws. - Accessibility issues for small-scale creators.	- IP reform can provide creatives with more sustainable incomes and incentives for innovation. - Standardizing contracts can simplify legal processes for creators and exporters.
Cultural Leadership	Leadership in CCIs now emphasises sustainability, advocacy, and entrepreneurship, addressing unique creative challenges.	- Diverse and often informal work settings challenge structured leadership. - Communication of value in non-replicable outputs.	- Expanding leadership programs like VANSA can build capacity. - Digital leadership offers ways to streamline and innovate in CCIs.

Cultural consumption trends are also linked to the rise of online activity that was given a boost during COVID-19. Some creatives and cultural institutions have maintained a hybrid approach to reaching their audiences, although most agree that in-person or live cultural consumption and participation cannot be replaced by online formats. User-generated content on social media platforms by sometimes powerful "influencers" is working as an important marketing and promotion tool for creative content. Even comments by ordinary individuals on platforms like the social media pages of fashion designers and theatres can help to spread e-Word of Mouth messages that increase demand. Although not yet very prevalent in South Africa, cultural consumers are also increasingly concerned about the environmental impact of their purchases and activities. Table 11 summarises some of the main demand-side opportunities and challenges.

Table 11.Demand Side and Cultural Consumption Trends: Challenges and Opportunities

Aspect	Trends	Challenges	Opportunities
Digital Cultural Consumption	Online consumption of cultural goods is rising, driven by streaming, virtual tours, and online festivals.	- Internet access and cost barriers persist. - Concerns about virtual experiences substituting physical engagement for museums and events.	- Broader audience reach, especially internationally. - Integration of digital and physical experiences can increase overall engagement and revenue streams.
Social Media and User-Generated Content (UGC)	Social media platforms and influencers amplify cultural consumption by promoting events and products through electronic word-of-mouth (eWOM).	- Algorithms often favour global over local creators. - Monetization challenges for user-generated content.	- Creatives can build and engage audiences directly. - Opportunities to combine UGC with traditional contracts to develop and formalize creative careers.
Environmental Sustainability and Ethical Consumption	Ethical and environmentally sustainable practices are gaining traction in the cultural economy, especially in areas like fashion and cultural tourism.	- Consumer willingness to pay for sustainable products is low in South Africa. - High costs and infrastructure challenges for implementing sustainable practices.	- Growing global demand for sustainable goods offers export opportunities. - Festivals and events can attract eco-conscious visitors by adopting sustainability criteria.

Although not a direct goal of this report, there are a number of recommendations for both policy-makers and creatives, which emerge from the analysis:

Invest in Digital and Internet Infrastructure: To capitalise on the opportunities offers by the techno-economic production and consumption trends, digital infrastructure and internet access will need to be enhanced. High costs and limited access to reliable internet are significant barriers for digital platforms, streaming services, and digital cultural consumption. High costs and limited access to reliable internet are significant barriers for digital platforms, streaming services, and digital cultural consumption, as well as for creative producers.

Strengthen Intellectual Property (IP) and Copyright Laws: As creative producers move online and start to trade more internationally, they face challenges with piracy, AI-generated content, and the enforcement of royalties in digital and dematerialised markets. It is essential that copyright and IP laws are modernised and can be robustly enforced. This will be important to protect creators' rights, ensure fair remuneration, and build trust in South African creative exports. Export councils, industry associations, and private firms can also create campaigns highlighting South African creativity in key export markets and attend global expos or festivals to boost international sales and position South Africa as a cultural innovation hub.

Support Hybrid Work Models and Freelancers with Social Protections: The gig economy and hybrid work models provide great opportunities for South African creatives to work beyond the boarders of the country and to reach a global marketplace. However, freelance work leaves creatives vulnerable to precarity and lack of social protection benefits. The implement portable social benefits (e.g., health insurance, pensions) for freelancers and establishing clearer guidelines for contracts will be important for encouraging greater participation in the sector. For creative businesses, the adoption of Hybrid Work Strategies with Shared Resources could be an important strategy. Coworking spaces with shared access to high-end equipment (e.g., studios, editing suites) can help to overcome resource limitations while enabling remote collaboration, fostering community and innovation.

Foster Regional Collaborations within Africa and build Cultural Leadership Capacity: Industry associations, creative firms, and government organisations can work to build partnerships with creatives and organisations in other African countries to develop co-productions, share expertise, joint exhibitions, and shared market access strategies. The aim would be to strengthen South-South trade, increase visibility of African culture globally, and leverage the AfCFTA to reduce trade barriers within the continent. Offering shared courses in Cultural Leadership that builds on international experience will also be key to developing the capacity of South African creatives to develop their ability to play a more active role in the strategic leadership and policy-making of the sector.

Develop Targeted Funding and Support for Emerging Technologies: Being able to leverage the opportunities offered by digitalisation depend on both access to funding and skills and education on how the new technologies can be used effectively in the CCIs. This includes both improved production speed and quality, and marketing through leveraging social media. Technologies like NFTs and blockchain, as well as generative AI, offer transformative opportunities but are underutilised due to knowledge gaps and high entry costs. Industry associations, NGOs and government departments could provide grants or subsidies to support training, workshops, and experimentation with these technologies. This would equip creatives with the skills to use advanced technologies, fostering innovation and new revenue streams, particularly for small-scale and early-career creatives, who might otherwise be left behind.

10 Conclusions

This report set out to examine the major economic trends that have shaped the global and South African cultural and creative industries (CCIs) over the past decade. In doing so, it aimed to identify key opportunities and challenges for South African CCIs and to explore areas for policy intervention that could support their sustainable growth.

One of the most significant trends has been the rapid expansion of **digital platforms**, which have transformed content distribution and audience engagement. While these platforms have created new opportunities for South African creatives to reach international markets, challenges remain in monetization, algorithmic visibility, and the digital divide. Similarly, **NFTs and blockchain technologies** have introduced new mechanisms for ownership and revenue generation in the arts, but concerns about market volatility and accessibility persist. The rise of **Generative AI** has presented both opportunities for enhanced productivity and new threats to traditional creative roles, highlighting the need for adaptive policies on intellectual property and fair remuneration.

In the **work and labour market**, the continued expansion of the **gig economy** has reinforced both the flexibility and precarity of creative work. While many South African CCIs professionals have embraced freelance and contract-based employment, this shift has also raised concerns about job security, access to benefits, and fair wages. The growth of **industry associations and unions** has been a notable counter-trend, helping to advocate for better protections and collective bargaining power.

International trade dynamics have also evolved, with South-South cultural trade becoming more prominent as African and other developing economies deepen their creative exchanges. The **dematerialisation of cultural products** has further accelerated the rise of services-based trade, presenting opportunities for South African CCIs in fields such as digital media, gaming, and design. However, ensuring competitiveness in the global market will require greater investment in digital infrastructure and skills development.

The **management of the creative economy** has been shaped by evolving policies on **intellectual property, cultural funding, and leadership**. While South Africa has made strides in cultural policy development, sustained public investment will be critical to support innovation and inclusion within CCIs. Additionally, cultural leadership is emerging as a key driver of sector resilience, requiring both traditional institutional support and grassroots creative entrepreneurship.

On the **demand side**, digital consumption patterns have shifted significantly, with **social media and user-generated content** becoming primary influences on audience preferences. Ethical and sustainable consumption trends are also reshaping creative industries, encouraging a move toward environmentally responsible production and socially conscious branding.

Overall, the findings of this report suggest that South African CCIs are at a pivotal moment of transformation. While technological advancements and shifting market structures offer unprecedented opportunities for growth and global reach, challenges related to economic sustainability, digital access, and labour protections must be addressed. Strategic policy interventions, increased public and private sector investment, and industry-led initiatives will be essential in shaping an inclusive and dynamic creative economy for the future.

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APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY Cultural and Creative Industries Economic Trends over the last 10 years**. March 2025**				
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