south african
cultural observatory

Final Report

Spatial Distribution

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

sport, arts & culture
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South African Cultural Observatory

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2025

Executive Summary

The Cultural, Creative and Sports Industries (CCI&S) constitute an increasingly important component of South Africa's economy, with significant implications for employment creation, poverty reduction, trade development and cultural participation. At both provincial and metropolitan levels, the sector demonstrates its capacity to contribute directly to economic output while simultaneously fostering inclusive social development. This report consolidates two streams of research—the provincial and metropolitan profiles—into a single, integrated analysis to provide a more comprehensive view of the sector's economic footprint across South Africa's diverse geographies.

At the provincial level, the findings reaffirm Gauteng's position as the country's dominant creative and sports economy. In 2023, Gauteng accounted for 42% of South Africa's total CCI&S GDP, alongside the largest share of employment, household income, and tax revenue attributed to the sector. The Western Cape and KwaZulu-Natal were the following most significant contributors, with notable strengths in cultural exports, particularly in the Western Cape. Smaller provinces such as the Eastern Cape, Free State, and Limpopo also exhibit distinctive contributions to cultural output, particularly in the visual arts and crafts, performance and celebration, and books and the press. Notably, the evidence from the provinces highlights not only the economic magnitude of the CCI&S but also its capacity to channel resources to low-income households, thereby contributing to poverty alleviation and social upliftment.

The metropolitan profiles complement this picture by illustrating the concentrated role of South Africa's major urban centres as anchors of creative activity and trade. Johannesburg, Cape Town, Tshwane, and eThekwini emerge as the principal hubs where cultural production, employment opportunities, and international linkages are most pronounced. Metros are also distinguished by their demographic composition, with higher levels of participation among youth and tertiary-educated individuals, reflecting the presence of specialised creative clusters and institutions of higher learning. While provincial economies provide the broader base of innovative and sports participation, metropolitan areas appear to function as the focal points through which South Africa integrates into global cultural and sports markets.

Taken together, the provincial and metropolitan analyses reveal both opportunities and challenges. On the one hand, the evidence underscores the sector's resilience and its contribution to economic diversification, particularly in the domains of design, creative services, and sports and recreation, which show robust growth across several regions. On the other hand, persistent spatial inequalities remain evident, with most creative and sports activities concentrated in a few provinces and metropolitan areas. Challenges associated with digitisation, skills mismatches, and trade imbalances further complicate the sector's growth trajectory.

This integrated report, therefore, highlights the necessity of coordinated strategies that

link provincial and metropolitan efforts. Provinces remain critical for broad-based cultural diffusion and grassroots development, while metros are indispensable as centres of trade, innovation, and international competitiveness. Strengthening the relationship between these two levels of the economy is essential to maximising the CCI&S's contribution to national development objectives.

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1. Introduction

The Cultural, Creative and Sports Industries (CCI&S) have increasingly been recognised as critical drivers of South Africa's economic transformation and social development. While the sector is often celebrated for its symbolic and cultural significance, it has in recent years demonstrated a tangible contribution to GDP growth, employment creation, household income, and trade diversification. In line with international scholarship and policy debates, there is growing recognition that the creative and sports domains can generate both economic and non-economic returns, ranging from enhanced competitiveness to improved social cohesion (UNESCO, 2009; Higgs & Cunningham, 2008; Cattaneo & Snowball, 2020).

At the national level, several strategies and policy frameworks have reinforced the importance of the creative economy, including the New Growth Path, the National Development Plan, and, more recently, the Cultural and Creative Industries Masterplan. These instruments situate the sector within broader industrial policy and employment strategies, positioning culture, creativity, and sport as potential levers for inclusive development. However, despite this national framing, the bulk of implementation, resource allocation, and sectoral clustering occurs at the provincial and metropolitan levels, where government departments, municipalities, and industry stakeholders shape the lived realities of cultural and sports participation.

Provinces provide the broader enabling environment—ranging from infrastructure investment to grassroots cultural programmes—while metropolitan areas tend to act as specialised hubs of production, trade, and consumption. In urban contexts, the density of institutions, creative clusters, and educational opportunities amplifies the potential for cultural industries to flourish. Provinces, by contrast, often provide the raw talent base, resource endowments, and community structures that sustain the sector over the longer term. By examining both tiers together, this report seeks to illuminate complementarities, tensions, and opportunities that are otherwise obscured when the levels are considered in isolation.

The emergence of artificial intelligence (AI) and digital technologies further underscores the urgency of this integrated perspective. The diffusion of AI tools in design, music, film production, and even sports analytics is reshaping value chains across the sector. Metropolitan areas, with their concentration of high-speed internet, digital infrastructure, and innovation ecosystems, are at the forefront of experimenting with AI-enabled cultural production and distribution. This has important implications for employment profiles, skill requirements, and trade opportunities in metropolitan areas such as Johannesburg, Cape Town, and Tshwane. At the same time, provinces are not immune to these shifts: AI offers opportunities for rural creative practitioners to access broader markets, digitise artisanal products, and engage in new forms of cultural entrepreneurship. Yet it also presents risks, including job displacement in traditional creative occupations and deepening inequalities between digitally connected metros and less connected provinces.

Against this backdrop, the integrated analysis of provincial and metropolitan profiles presented in this report serves several objectives. First, it seeks to provide a comprehensive overview of the economic contribution of CCI&S across all subnational levels. Second, it highlights the distinct pathways through which provinces and metros engage with the sector, noting the different yet complementary roles they play in sustaining growth. Third, it situates the analysis within contemporary dynamics—including digitisation and the rise of AI—that are reshaping cultural production and consumption globally and regionally. In doing so, the report aims not only to document the present state of the sector but also to identify emerging trajectories and policy interventions necessary for ensuring that the growth of the CCI&S remains inclusive, innovative, and sustainable across South Africa's provinces and metropolitan areas.

2. Methodology

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

The methodology distinguishes between provincial- and metropolitan-level analyses, thereby enabling an assessment of the spatial distribution and interconnections between broader regional economies and concentrated urban hubs. At the provincial level, the focus is on Gross Value Added (GVA), employment, household income, trade, and fiscal contributions, with data disaggregated by domain. At the metro level, the analysis follows the same structure. Still, it places greater emphasis on the role of urban creative clusters, the demographic and educational profiles of cultural workers, and the integration of metros into global trade networks. By aligning the methodological framework across both tiers, the report provides a spatially comparative picture of how CCI&S contributes to development in different parts of South Africa.

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

International trade data are drawn from the South African Revenue Service (SARS) customs declarations and Quantec trade records, with further validation through UN Comtrade and the International Trade Centre (ITC) Trade Map database. At the provincial and metropolitan levels, trade flows are classified using the 2007 six-digit Harmonised System (HS) codes identified by UNESCO as relevant to cultural goods, supplemented by categories for sports equipment and services. Where possible, exports and imports are linked to specific cultural domains to trace the geographic distribution of trade activity. It should be noted, however, that inconsistencies exist between national trade classification systems and UNESCO's definitions of sports and recreation, resulting in certain mismatches.

The methodology also accounts for the fiscal and social contributions of the CCI&S. Estimates of tax revenue generated by the sector are derived from the satellite account modelling, which captures both direct and indirect contributions through linkages with other sectors. Poverty reduction is assessed by calculating the share of income from CCI&S that accrues to low-income households. This spatial dimension is critical, as it reveals not only the sector's aggregate economic value but also its distributive effects across provinces and within metropolitan areas.

An important methodological consideration lies in the impact of digitisation and artificial intelligence (AI) on the cultural and sports industries. Traditional statistical classifications are largely product-based and thus often fail to capture digital forms of cultural production, such as streaming services, AI-generated design, or digital publishing. At the metropolitan level, where digital adoption is more advanced, AI-driven innovations in design, film editing, and music production are reshaping occupational patterns and value chains. Yet, these shifts remain difficult to capture through existing survey instruments. At the provincial level, meanwhile, digitisation offers new opportunities for rural creatives and small enterprises to access broader markets, though limited infrastructure constrains uptake. The methodology, therefore, acknowledges that regional measurement of CCI&S is increasingly complicated by these transformations and that future satellite accounts will need to integrate digital and AI-related activities more explicitly.

Taken together, this integrated methodological approach ensures that the report provides a rigorous and spatially nuanced assessment of CCI&S, one that is both comparable to international standards and sensitive to the unique geographic realities of South Africa's provinces and metros.

3. Provincial Profiles

This section presents profiles of the nine provinces, highlighting their contributions to GDP, employment, and spatial dynamics in trade.

Table 1 presents the distribution of provincial cultural occupations, while Table 2 presents provincial GDP contributions. Tables 3 and 4 represent provincial exports and imports, respectively. The narrative for these tables is provided under provincial sections.

Table 1: Provincial Cultural Occupations, 2024

Domain	Western Cape	Eastern Cape	Northern Cape	Free State	KwaZulu-Natal	North West	Gauteng	Mpumalanga	Limpopo	Total
A. Cultural & Natural Heritage	684	406	62	285	779	288	517	527	1,789	5,338
B. Performance & Celebration	13,012	5,709	770	4,159	9,841	3,241	26,127	3,490	7,211	73,560
C. Visual Arts & Crafts	7,967	1,333	439	2,461	1,838	1,399	12,794	895	2,238	31,364
D. Books & Press	52,005	26,111	4,534	16,784	63,337	18,448	114,442	29,291	37,212	362,164
E. Audio-Visual & Interactive Media	81,651	30,727	6,152	19,142	67,824	25,447	155,309	28,892	48,751	463,895
F. Design & Creative Services	69,410	27,445	6,470	14,379	67,471	20,875	121,951	22,482	27,512	377,996
G. Sports and Recreation	20,162	2,198	688	578	15,110	1,430	36,162	3,529	4,024	83,880
Education	4,935	1,365	369	854	4,396	1,013	12,584	3,717	1,632	30,864
Total	249,826	95,294	19,484	58,641	230,598	72,141	479,887	92,823	130,369	1,429,061
Percentage Share	17.5%	6.7%	1.4%	4.1%	16.1%	5.0%	33.6%	6.5%	9.1%	100%

Source: StatsSA

Table 2: Provincial GDP

Domain	Eastern Cape	Free State	Gauteng	KwaZulu Natal	Limpopo	Mpumalanga	Northern cape	North West	Westen Cape	Total
A. Cultural & Natural Heritage	1 753	397	2 718	1 358	399	233	256	209	2 373	9 697
B. Performance & Celebration	1 077	322	5 772	1 301	619	328	207	661	1 759	12 047
C. Visual Arts & Crafts	1 156	607	13 740	3 733	581	581	205	524	5 092	26 219
D. Books & Press	1 765	489	11 119	3 216	1 210	1 295	415	1 105	3 944	24 559
E. Audio-Visual & Interactive Media	3 305	2 470	24 915	7 172	2 682	3 174	548	1 331	8 072	53 668
F. Design & Creative Services	3 448	1 835	27 407	5 783	1 875	1 394	476	1 701	10 802	54 721
G. Sports and Recreation	4 535	3 017	15 915	18 501	5 414	3 167	637	1 468	7 349	60 003
Education	3 020	1 712	11 403	4 703	2 400	1 506	669	1 627	3 220	30 261
Total	20 059	10 850	112 990	45 767	15 180	11 677	3 414	8 626	42 611	271 174
Percentage Share	7,4%	4,0%	41,7%	16,9%	5,6%	4,3%	1,3%	3,2%	15,7%	100,0%

Source: Social Accounting Matrix estimates

Table 3: Provincial Exports (R millions)

Province	2018	2019	2020	2021	2022	2023	2024
Gauteng	5,521.00	3,753.00	3,093.00	3,237.59	5,348.88	6,265.45	4,559.67
Western cape	5,023.00	4,125.00	5,058.00	4,751.94	6,414.31	6,139.21	3,946.19
KwaZulu Natal	983.30	931.20	1,110.10	1,095.03	1,042.83	1,194.85	501.08
Eastern Cape	105.10	129.80	118.20	126.79	74.76	94.26	318.34
Limpopo	58.10	65.10	62.00	64.80	12.29	20.11	140.65
Mpumalanga	50.00	63.00	69.00	80.56	46.55	67.10	89.55
Free State	56.14	40.47	38.59	49.63	42.18	31.36	78.61
North West	47.30	57.20	55.40	60.05	60.80	66.26	40.69
Northern Cape	2.50	2.70	1.80	3.22	1.14	1.64	10.50
Total	**11,846**	**9,167**	**9,606**	**9,470**	**13,044**	**13,880**	**9,685**

Source: StatsSA

Table 4: Provincial Imports (R Millions)

Province	2018	2019	2020	2021	2022	2023	2024
Gauteng	4,738.00	4,005.00	3,346.00	8,642.64	9,812.49	10,456.13	8,589.57
Western cape	1,536.00	1,566.00	1,274.00	3,509.75	4,271.01	4,032.51	4,570.35
KwaZulu Natal	962.90	1,013.70	831.20	1,621.37	1,802.75	1,662.06	1,684.91
Eastern Cape	80.50	78.50	53.80	148.20	165.90	113.76	112.86
Limpopo	4.00	5.10	9.00	25.26	22.26	28.25	9.15
Mpumalanga	14.00	11.00	17.00	35.81	25.42	33.13	30.07
Free State	10.98	11.96	6.67	25.16	37.16	46.35	21.81
North West	19.00	21.90	21.60	21.86	18.64	24.01	20.61
Northern Cape	45.80	29.00	2.70	2.15	2.49	1.52	48.44
Total	7,411	6,742	5,562	14,032	16,158	16,398	15,088

Source: StatsSA

3.1. Eastern Cape

The Eastern Cape occupies a distinctive position within South Africa's Cultural, Creative and Sports Industries (CCI&S), characterised less by scale than by its cultural depth and contribution to identity formation. Economically, the province's creative economy remains modest in comparison to national leaders such as Gauteng and the Western Cape. Nevertheless, it plays a vital role in sustaining employment, generating household income, and fostering cultural participation across both urban centres and rural districts.

In 2023, the Eastern Cape accounted for approximately 7.4 % of national CCI&S GDP, reflecting a sectoral output of R20 billion. While this share appears small in relative terms, the province's creative economy is noteworthy for its labour intensity. Employment in the sector accounts for more than 95,000 jobs (2024), equivalent to 6.7% of national CCI&S employment. This makes the Eastern Cape one of the provinces in which the sector's employment contribution is lower than its GDP share, underscoring its significance as a livelihood generator in a region characterised by high levels of poverty and unemployment.

The spatial distribution of creative and sports activity within the Eastern Cape reflects the province's dual geography. On the one hand, Nelson Mandela Bay and Buffalo City metros act as urban anchors, hosting formal institutions such as theatres, museums, and libraries, while also connecting the province to national and international trade flows. On the other hand, extensive rural areas contribute through craft production, heritage activities, and performance traditions, many of which are embedded in community life and informal markets. This combination of urban hubs and rural networks gives the province a hybrid creative economy, one that is locally embedded yet nationally significant.

Trade in cultural goods from the Eastern Cape is limited in scale but concentrated in particular domains. The Visual Arts and Crafts domain accounts for the largest share of exports, reflecting both artisanal production and small-scale manufacturing of cultural products. Imports, by contrast, are dominated by sports goods, much of which is linked to the province's vibrant sporting culture. Despite modest export levels, the province shows strong potential for growth in cultural tourism and in leveraging its heritage assets to expand international trade.

From a policy perspective, the Eastern Cape faces a dual challenge. On the one hand, the province must strengthen its urban creative clusters in Nelson Mandela Bay and Buffalo City to ensure integration into national and international markets. On the other, it must provide sustained support for rural creative enterprises, particularly in crafts and heritage, which remain vulnerable to market fluctuations and infrastructural constraints. The rapid diffusion of digitisation and artificial intelligence (AI) further complicates this geography: while urban centres are increasingly equipped to adopt digital platforms and AI-driven design tools, rural areas remain constrained by infrastructure gaps, risking the deepening of spatial inequalities within the province.

In sum, while the Eastern Cape's creative economy is modest in scale, its contribution is significant with respect to employment generation, poverty alleviation, and cultural identity. The province demonstrates how the CCI&S can act as a development tool in regions with limited industrial bases, provided that spatial inequalities between urban and rural creative economies are actively addressed.

3.2. Free State

The Free State contributes a relatively modest share to South Africa's CCI&S economy but holds unique importance due to its central geographic location and cultural traditions. In 2023, the province generated approximately R10.8 billion in CCI&S GDP, equivalent to 4 % of the national sector. Although this output is small, it supports nearly 58,000 jobs (2024), reflecting the sector's role as an employer in a province with limited industrial diversification.

Spatially, the province's creative economy is concentrated in Mangaung Metro, which functions as the primary hub of cultural activity. The metro hosts key cultural and sporting institutions, including museums, theatres, and stadiums, as well as festivals that reinforce its role as a regional centre. Beyond Mangaung, smaller towns contribute through community-based initiatives and informal cultural practices, though these remain largely under-capitalised.

Employment in the Free State CCI&S is highly reliant on the Visual Arts and Crafts and Performance and Celebration domains. Craft production, heritage activities, and local performance traditions underpin rural participation, whereas Mangaung supports more formal employment in cultural institutions and sports.

Trade activity is limited, with small but growing exports of crafts and design products. Imports are dominated by sports and recreational goods, reflecting both community-level sports participation and demand from formal institutions. The limited export base suggests a need to support local creative enterprises in accessing broader markets, potentially through digitisation and e-commerce platforms.

As with other smaller provinces, the Free State faces challenges of infrastructure, market access, and digital connectivity. AI and digital technologies present both opportunities and risks: while e-commerce and AI-assisted design could open external markets to Free State creatives, poor broadband coverage in rural areas risks entrenching the divide between urban Mangaung and the province's periphery.

3.3. Gauteng

Gauteng is the powerhouse of South Africa's CCI&S economy, reflecting its position as the country's economic and cultural hub. In 2023, the province accounted for 42% of national CCI&S GDP, equivalent to R113 billion, making it the undisputed leader in both scale and intensity. The sector supports approximately 480,000 jobs (2024), accounting for more than a third of total CCI&S employment nationally.

The spatial distribution of Gauteng's creative economy is dominated by its three metropolitan municipalities: Johannesburg, Tshwane, and Ekurhuleni. Johannesburg serves as the cultural capital, hosting major theatres, galleries, film studios, and music production houses. Tshwane reinforces this role with educational and heritage institutions, while Ekurhuleni provides industrial and logistics support, particularly in sports equipment manufacturing and distribution. Collectively, the metros anchor Gauteng's creative and sports economy, while smaller towns play limited roles.

Trade is a defining feature of Gauteng's dominance. The province accounts for the majority of South Africa's cultural exports and imports, with particular strength in the domains of design, audio-visual and interactive media, and sports goods. Gauteng's integration into global value chains is reinforced by its international connectivity, creative clusters, and digital infrastructure.

AI and digital technologies are transforming Gauteng's creative economy more rapidly than in any other province. The province's metropolitan areas are leading in AI-enabled design, film editing, music production, and sports analytics, positioning Gauteng as South Africa's most digitally advanced creative hub. However, these shifts also raise concerns about job displacement, as automation reshapes employment in traditional cultural occupations. Spatial inequalities within Gauteng are evident: while metros thrive, peri-urban and township areas continue to face barriers to participation, underlining the importance of inclusive policy strategies.

3.4. KwaZulu-Natal

KwaZulu-Natal (KZN) represents a central cultural and sports hub, combining a rich heritage base with strong urban centres. In 2023, the province accounted for 17 % of national CCI&S GDP, valued at approximately R46 billion, and supported more than 230,000 jobs (2024). This makes KZN the second-largest contributor to the sector after Gauteng.

The province's creative economy is spatially anchored in eThekwini Metro, which hosts internationally recognised festivals, sports events, and cultural institutions. Beyond Durban, secondary cities such as Pietermaritzburg and Richards Bay contribute through heritage, crafts, and sports infrastructure, while rural areas remain vital for performance traditions and artisanal crafts.

KZN's trade profile is defined by its coastal position and port infrastructure, which facilitate cultural exports, particularly in crafts and design products. Imports are driven by sports equipment and media goods.

AI and digitalisation are reshaping KZN's creative industries, particularly in music and film, where digital platforms have expanded the reach of local artists. However, access remains uneven, with Durban leading in digital adoption while rural creatives lag behind. This spatial divide mirrors broader inequalities in the province, in which urban hubs dominate output while rural participation sustains cultural identity.

3.5. Limpopo

Limpopo's contribution to South Africa's CCI&S is relatively small in economic terms but highly significant from a cultural and social perspective. In 2023, the province generated R15 billion in CCI&S GDP, representing about 5.6 % of the national sector, and sustained nearly 130,000 jobs (2024). These figures highlight the sector's importance in a province where formal industrial activity is limited and where creative and cultural practices remain closely tied to community identity.

Spatially, the province's creative economy is centred in Polokwane, which serves as the hub for formal institutions, including libraries, theatres, and sports facilities. Beyond the provincial capital, cultural and sports activities are distributed widely across rural districts, where crafts, performances, and indigenous sports form a vital part of local livelihoods. The province's strong heritage base positions it as an essential custodian of traditional knowledge, particularly in crafts and performance traditions.

Trade flow remains limited, with most exports consisting of crafts and performance-related goods. Imports are concentrated in sports equipment, reflecting the popularity of sports and recreation across the province.

The adoption of digital platforms and AI technologies remains limited, constrained by infrastructure gaps. While younger creatives in Polokwane and university hubs are beginning to experiment with digital tools for design and music production, rural areas remain largely excluded from these opportunities. This uneven adoption raises concerns about widening spatial inequalities, even as digitisation opens potential markets beyond the province's borders.

3.6. Mpumalanga

Mpumalanga contributes a modest share to the national CCI&S but plays a crucial role in regional development through its strong cultural tourism sector. In 2023, the province generated R12 billion in CCI&S GDP, equivalent to 4.3% of the national total, and supported over 92,000 jobs (2024).

A combination of urban and tourism-driven hubs characterises the spatial distribution of CCI&S activity in Mpumalanga. Mbombela (Nelspruit) functions as the province's primary cultural centre, hosting formal institutions and events. At the same time, towns along the tourism corridor near the Kruger National Park provide markets for crafts, heritage performances, and festivals, linking the local creative economy to both domestic and international visitors.

Employment in the province is concentrated in Visual Arts and Crafts and Performance and Celebration, with a growing sports economy tied to community-level participation. Trade flows are limited but strategically linked to tourism, with crafts and cultural products sold to international visitors forming the bulk of exports.

Digitisation and AI are slowly reshaping opportunities, particularly for small creative enterprises in tourism hubs that are beginning to market products online. However, uneven digital access across rural areas limits these gains, leaving much of the province's creative economy reliant on physical markets. The challenge for Mpumalanga lies in bridging this digital divide while leveraging its spatial advantage as a cultural tourism gateway.

3.7. North West

The North West province presents a small yet diverse creative economy. In 2023, the province contributed R8.6 billion to CCI&S GDP, representing about 3.2% of the national sector, and supported over 72,000 jobs.

The province's spatial distribution of creative and sports activity is anchored in Rustenburg and Mahikeng, where urban institutions provide formal platforms for cultural and sports participation. Outside these centres, the province's rural districts sustain cultural livelihoods through crafts, heritage, and traditional sports. Rustenburg's proximity to Gauteng creates opportunities for market linkages, though these remain underdeveloped.

Sports dominate the province's creative economy, with provincial government expenditure on sports recording some of the fastest growth nationally. Trade is limited, with exports focused on crafts and imports dominated by sports goods. The uptake of digital technologies is emerging slowly, primarily among younger creatives, but infrastructure constraints remain a significant barrier. Without targeted investment in digital connectivity, the North West risks falling further behind leading provinces and metros in the adoption of AI and digital creative practices.

3.8. Northern Cape

The Northern Cape, South Africa's largest province by land area, contributes the smallest share to the national CCI&S economy. In 2023, the province generated R3.4 billion in CCI&S GDP, equivalent to 1.3% of the national total, and sustained more than 19,000 jobs (2024).

The spatial distribution is characterised by the province's vast geography and low population density. Kimberley functions as the principal hub, providing formal institutions and heritage attractions, while smaller towns and rural areas contribute through crafts, cultural tourism, and community-based sports. Despite its small scale, the sector plays an outsized role in sustaining livelihoods in remote areas, particularly where alternative employment opportunities are scarce. Trade is minimal, but crafts and heritage products tied to tourism represent small but meaningful export opportunities.

Digital and AI adoption is minimal, with infrastructure challenges hindering innovation. While there is potential for digital platforms to connect Northern Cape creatives to external markets, realising this opportunity will require significant investment in connectivity and digital skills.

3.9. Western Cape

The Western Cape is South Africa's second-largest contributor to the CCI&S, after Gauteng. In 2023, the province accounted for 5.74% of national CCI&S GDP, valued at R42.6 billion, and supported approximately 250,000 jobs (2024). The province is a major player in cultural exports, with a significant share of national trade in design, media, and creative services passing through Cape Town's global networks.

Spatially, the province's creative economy is anchored in Cape Town, which functions as South Africa's leading cultural gateway to international markets. The city hosts a dense concentration of creative industries, including film, advertising, design, and digital media, alongside heritage and tourism assets. Secondary towns such as Stellenbosch and George contribute through festivals, wine-linked cultural tourism, and community-based initiatives.

The Western Cape's trade profile is highly internationalised. Exports of creative goods and services, particularly in design, audio-visual, and crafts, are significant, while imports reflect both consumer demand and global creative integration.

The adoption of AI and digital technologies is particularly advanced in Cape Town, which has become a hub for digital design, film post-production, and music streaming. This positions the Western Cape as a leader in the digital creative economy, yet it also highlights spatial disparities, with smaller towns and rural areas lacking comparable infrastructure.

In summary, the Western Cape demonstrates the potential of the CCI&S to compete globally, but ensuring that the benefits of this global integration diffuse to smaller towns and communities remains an ongoing challenge.

The analysis of the provinces underscores how the CCI&S is unevenly distributed across South Africa, with economic weight heavily concentrated in Gauteng, the Western Cape, and KwaZulu-Natal. Yet within these provinces, the sector's performance is overwhelmingly shaped by metropolitan areas. Johannesburg, Tshwane, Cape Town, and eThekwini not only anchor provincial creative economies but also act as South Africa’s principal gateways to global cultural and sports markets. Smaller metros such as Mangaung, Nelson Mandela Bay, and Buffalo City also play significant roles as regional hubs, sustaining localised creative activity and linking rural provinces to national value chains. For this reason, a metropolitan lens is indispensable: it reveals both the concentrated drivers of growth and the spatial inequalities between large metropolitan hubs and secondary cities.

4. Metropolitan Profiles

The metropolitan analysis illustrates the role of South Africa's eight metros in anchoring provincial creative economies and linking the country to global cultural markets.

4.1. Buffalo City

Buffalo City, situated in the Eastern Cape, illustrates the role of a medium-sized metropolitan municipality in sustaining regional cultural and sports activities. In 2023, the metro generated R2.8 billion in CCI&S GVA, accounting for approximately 21% of the provincial sector's GVA. Employment in the creative economy is approximately 19,000 jobs (2024), making it a key contributor to both provincial and national totals.

Table 5: Buffalo City GVA and Employment Contribution

Domain	GVA (R m), 2023	Employment, 2024
A. Cultural & Natural Heritage	488	-
B. Performance & Celebration	456	1 634
C. Visual Arts & Crafts	130	722
D. Books & Press	165	4 600
E. Audio-Visual & Interactive Media	400	4 972
F. Design & Creative Services	390	5 773
G. Sports and Recreation	333	1 176
Education	470	202
Total	2 832	19 080
Percentage contribution	**21%**	**20%**

Source: StatsSA, Social Accounting Matrix estimates

The metro's spatial significance lies in its dual role: as a custodian of heritage and as a growing urban hub for performance and sports. The Visual Arts and Crafts domain is particularly prominent, supported by artisanal production and local festivals.

Trade flows remain limited, but Buffalo City serves as an essential node for distributing crafts and cultural goods from surrounding rural areas into national markets. However, the metro faces significant challenges of infrastructure, skills development, and limited integration into global networks. Adoption of digital and AI technologies is emerging but remains at an early stage, with most opportunities concentrated among younger creatives.

4.2. City of Cape Town

Cape Town stands out as South Africa's leading international cultural hub. In 2023, the metro accounted for 71% of provincial CCI&S GVA, valued at R21 billion, and supported over 192,000 jobs. This scale positions Cape Town as the country's second-largest creative economy after Johannesburg.

Table 6: City of Cape Town GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	1 798	160
B. Performance & Celebration	1 945	10 388
C. Visual Arts & Crafts	2 299	7 509
D. Books & Press	3 124	35 871
E. Audio-Visual & Interactive Media	3 006	71 323
F. Design & Creative Services	3 360	52 284
G. Sports and Recreation	3 831	11 910
Education	1 945	3 350
Total	**21 307**	**192 797**
Percentage share	**71%**	**77%**

Source: StatsSA, Social Accounting Matrix estimates

The spatial concentration of creative industries in Cape Town is evident in the density of its film, design, music, and digital media clusters. The city hosts internationally recognised film festivals and advertising agencies and has become a continental leader in digital design and post-production. Design and Creative Services, Audiovisual and Interactive Media, and heritage and tourism dominate its creative output, while heritage and tourism reinforce its global cultural brand.

Cape Town's trade performance is equally impressive. The metro accounts for a large share of South Africa's creative exports, particularly in design, film, and crafts, owing to its port infrastructure and global linkages.

The adoption of AI and digital technologies is most advanced in Cape Town among South African metros. The integration of AI tools into film post-production, music distribution, and digital advertising underscores the city's position as an innovation leader. Yet this digital leadership also sharpens spatial inequalities between Cape Town and smaller towns in the Western Cape, many of which lack comparable infrastructure or market access.

4.3. eThekwini Metropolitan

eThekwini represents KwaZulu-Natal's most significant creative hub and South Africa's third-largest metro creative economy. In 2023, the metro accounted for 9% of provincial CCI&S GVA, equivalent to R17.9 billion, and supported approximately 121,000 jobs.

Table 7: eThekwini GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	2 135	143
B. Performance & Celebration	1 955	4 805
C. Visual Arts & Crafts	1 146	822
D. Books & Press	1 281	33 192
E. Audio-Visual & Interactive Media	2 967	31 141
F. Design & Creative Services	2 562	37 605
G. Sports and Recreation	3 821	11 067
Education	2 000	2 223
Total	**17 868**	**120 998**
Percentage share	**59,9%**	**52%**

Source: StatsSA, Social Accounting Matrix estimates

The spatial distribution of eThekwini's creative economy reflects its dual role as a coastal trade hub and cultural centre. The city is renowned for its festivals, music, and performance traditions, which continue to attract domestic and international audiences. Sports also play a critical role, with Durban hosting several large-scale sporting events and facilities. The Performance and Celebration and Sports and Recreation domains dominate the metro's profile, although design and creative services are expanding rapidly. Trade flows are facilitated by the Port of Durban, thereby enhancing the city's role as a gateway for cultural exports, particularly in crafts and design products.

Digitisation is reshaping the metro's cultural economy, with local musicians, designers, and film producers increasingly using online platforms to expand their reach. AI tools are gradually being adopted in music production and sports analytics, although adoption remains uneven across the metro. The challenge for eThekwini lies in leveraging its strong heritage and cultural base while adapting to technological shifts that demand new skills and infrastructure.

4.4. City of Ekurhuleni

Ekurhuleni, situated within Gauteng, represents a distinctive component of the province's creative economy. While overshadowed by Johannesburg and Tshwane, the metro's industrial base and logistics infrastructure provide an essential backbone for the CCI&S. In 2023, Ekurhuleni contributed approximately 8% of provincial CCI&S GVA, equivalent to R6.5 billion, and supported over 123,000 jobs (2024).

Table 8: Ekurhuleni GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	601	93
B. Performance & Celebration	627	7 120
C. Visual Arts & Crafts	1 419	3 950
D. Books & Press	862	24 710
E. Audio-Visual & Interactive Media	723	40 584
F. Design & Creative Services	905	30 471
G. Sports and Recreation	827	11 662
Education	583	5 341
Total	6 547	123 932
Percentage share	**8.1%**	**26%**

Source: StatsSA, Social Accounting Matrix estimates

Spatially, the metro's creative activity is concentrated in industrial design, the manufacture of cultural and sports goods, and cultural services associated with its proximity to Johannesburg and Tshwane. This geographic positioning enables Ekurhuleni to act as a bridge between Gauteng's cultural hubs and its industrial capacity. While the metro hosts cultural institutions and community-based initiatives, its primary significance lies in its role as a supportive ecosystem for Gauteng's broader creative economy. Trade flows are strong in design and manufactured goods, though the metro remains less globally visible than Johannesburg or Cape Town.

Ekurhuleni's adoption of digital and AI tools is increasing, particularly in industrial design and manufacturing processes. While this enhances productivity, it also risks excluding smaller enterprises that lack the capital and infrastructure to compete. Without targeted policy support, the metro's creative economy may become more concentrated in larger firms, reinforcing inequality within the sector.

4.5. City of Johannesburg

Johannesburg is the largest and most diversified creative economy in South Africa, positioning itself as both a national cultural capital and a continental leader. In 2023, the metro accounted for 40% of provincial CCI&S GVA, valued at R32 billion, and supported more than 202,000 jobs in 2024.

Table 9: City of Johannesburg GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	4 189	162
B. Performance & Celebration	4 418	10 193
C. Visual Arts & Crafts	2 651	5 671
D. Books & Press	7 232	48 879
E. Audio-Visual & Interactive Media	2 618	66 621
F. Design & Creative Services	2 127	53 053
G. Sports and Recreation	4 581	15 463
Education	4 516	2 725
Total	**32 331**	**202 768**
Percentage share	**40%**	**42%**

Source: StatsSA, Social Accounting Matrix estimates

Spatially, Johannesburg hosts the highest concentration of creative clusters in the country. The city's theatre district, art galleries, film studios, and music production houses underpin its dominance in Performance and Celebration, Visual Arts, and Audio-visual and Interactive Media. The metro's informal creative economy is also significant, particularly in fashion and crafts, which spill into township and peri-urban areas.

Johannesburg is South Africa's leading exporter of cultural goods and services, particularly in design, audio-visual media, and creative services. Its global integration is reinforced by international partnerships, festivals, and the city's role as a financial hub.

The adoption of AI and digital technologies is most advanced in Johannesburg. AI-driven applications are evident in advertising, digital design, and music, while sports analytics are increasingly embedded in professional sports. Yet spatial inequalities remain stark: while central Johannesburg thrives, township creatives often lack access to comparable infrastructure and networks. Bridging this divide is essential for ensuring that the benefits of Johannesburg's creative dominance diffuse more broadly.

4.6. Mangaung

Mangaung, in the Free State, is a smaller yet symbolically important metropolitan area within South Africa's creative landscape. In 2023, the metro generated R4.6 billion in CCI&S GVA, accounting for just 64% of the provincial total GVA and sustaining about 19,000 jobs in 2024.

Table 10: Mangaung GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	834	72
B. Performance & Celebration	869	957
C. Visual Arts & Crafts	164	362
D. Books & Press	194	5 083
E. Audio-Visual & Interactive Media	696	6 241
F. Design & Creative Services	481	5 988
G. Sports and Recreation	440	0
Education	895	393
Total	**4 572**	**19 096**
Percentage share	**64%**	**33%**

Source: StatsSA, Social Accounting Matrix estimates

The metro's cultural economy is anchored in heritage and performance. Mangaung hosts key provincial institutions, such as museums, theatres, and sports facilities, making it the focal point of the Free State's creative activity. Beyond these institutions, community-based cultural and sports activities sustain local participation, although limited resources constrain their expansion. Trade flows remain minimal, with crafts and heritage products providing the only notable export categories.

Mangaung faces challenges of scale, infrastructure, and connectivity. The adoption of digital and AI technologies remains limited, although younger creatives are beginning to explore online platforms to market products. Without significant investment, however, the metro risks being left behind as larger urban centres integrate more deeply into global creative value chains.

4.7. Nelson Mandela Bay

Nelson Mandela Bay, also in the Eastern Cape, functions as a key urban hub in a largely rural province. In 2023, the metro contributed R4.6 billion to CCI&S GVA, representing 34% of the provincial sector, and supported approximately 25,000 jobs.

Table 11: Nelson Mandela Bay GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	751	119
B. Performance & Celebration	683	1 634
C. Visual Arts & Crafts	370	456
D. Books & Press	205	6 300
E. Audio-Visual & Interactive Media	695	7 519
F. Design & Creative Services	621	8 577
G. Sports and Recreation	598	-
Education	695	879
Total	**4 617**	**25 485**
Percentage share	**34%**	**27%**

Spatially, the metro's creative economy combines industrial and heritage dimensions. The Visual Arts and Crafts and Performance and Celebration domains dominate, supported by a vibrant local arts scene and heritage attractions. The automotive industry also creates linkages to design and sports-related production, giving the metro a unique industrial-creative interface. Trade activity is modest but provides an essential outlet for crafts and cultural products.

Digital adoption remains in its early stages, but there are signs of growth among creative enterprises that use online platforms to access national and international markets. AI applications remain minimal, though there is potential in design and sports-related analytics, given the metro's industrial base. The challenge for Nelson Mandela Bay is to deepen these opportunities while addressing the structural constraints of unemployment and limited infrastructure.

4.8. City of Tshwane

Tshwane is South Africa's administrative capital and a key metropolitan contributor to the CCI&S. In 2023, the metro generated R6.4 billion in CCI&S GDP, accounting for 6% of the national total, and supported approximately 65,000 jobs.

Table 12: City of Tshwane GVA and Employment Contribution

Domain	GVA (R million), 2023	Employment, 2024
A. Cultural & Natural Heritage	1 532	239
B. Performance & Celebration	1 654	5 994
C. Visual Arts & Crafts	5 228	2 303
D. Books & Press	3 137	26 136
E. Audio-Visual & Interactive Media	1 824	34 126
F. Design & Creative Services	2 189	25 527
G. Sports and Recreation	3 161	5 205
Education	1 483	3 092
Total	**20 207**	**102 621**
Percentage share	**25%**	**21%**

The spatial distribution of creative activity in Tshwane is shaped by its concentration of educational, cultural, and heritage institutions. The metro hosts universities, national museums, and heritage sites, which underpin strong participation in the Books and Press, Heritage, and Design and Creative Services domains. Alongside formal institutions, the metro's cultural economy is sustained by performance traditions and local creative enterprises. The automotive industry also creates linkages to design and sports-related production, giving the metro a unique industrial-creative interface.

While the redistributive effect is lower than in smaller metros, Tshwane's creative economy benefits from stable institutional support and steady integration into provincial and national markets.

Tshwane's adoption of digital and AI technologies is evident in design and architecture, where digital modelling and AI-assisted applications are increasingly common. The presence of universities and research institutions enhances innovation potential, positioning Tshwane as a knowledge hub for the sector. However, challenges remain in translating this innovation capacity into inclusive opportunities for township creatives and smaller enterprises.

5. Comparative Analysis of Provinces and Metros

The integrated analysis of provincial and metropolitan profiles reveals both the complementarities and divergences that characterise South Africa's CCI&S economy. A central finding is that the sector is highly spatially concentrated: three provinces—Gauteng, Western Cape, and KwaZulu-Natal—account for more than 70% of national CCI&S GDP and employment. Within these provinces, the dominant metros—Johannesburg, Tshwane, Cape Town, and eThekwini—function as engines driving not only provincial performance but also the country's integration into global cultural and sports markets. This layered geography highlights the sector's duality: while metros serve as anchors of innovation, trade, and high-value production, provinces provide a diffusion base, ensuring that creative activity extends into secondary towns and rural areas.

The analysis further demonstrates that metropolitan dominance is not uniform across all domains. For instance, Johannesburg leads nationally in audio-visual media, design, and performance, reflecting its dense creative clusters and diversified economy. Cape Town, by contrast, has established itself as the leading hub for film, design, and digital media exports, leveraging its port infrastructure and international networks. eThekwini's strength lies in festivals, music, and sports, positioning the city as both a heritage-rich and globally connected metro. Tshwane, while smaller in output, is unique in its concentration of educational and heritage institutions, which underpin its identity as a knowledge and culture hub. These metro-specific specialisations explain much of the variation observed in their parent provinces' performance.

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

A further spatial dynamic concerns the distribution of household income and the effects of poverty reduction. Smaller provinces and metropolitan areas, though limited in scale, tend to channel a higher proportion of creative-sector income to low-income households. For instance, the Northern Cape records the highest redistributive impact, with 16 % of CCI&S income accruing to low-income families, compared to just 9–10 % in wealthier metros such as Cape Town and Johannesburg. This suggests that the developmental significance of the CCI&S extends beyond headline GDP contributions, with smaller regions often playing a disproportionate role in poverty alleviation.

The adoption of digital technologies and artificial intelligence (AI) reveals another axis of inequality. Larger metros such as Johannesburg, Cape Town, and Tshwane are rapidly integrating AI into design, film, advertising, and sports analytics, reinforcing their dominance and positioning them as continental leaders in the digital creative economy. Smaller metros and rural provinces, however, remain constrained by weak digital infrastructure and limited skills, thereby widening the digital divide. This divergence highlights the risk that spatial inequalities within the sector may deepen in the absence of deliberate policy interventions to promote inclusive digital transformation.

Taken together, the comparative analysis suggests that while provinces and metros play distinct roles, their fortunes are deeply interconnected. Metros provide scale, specialisation, and global connectivity, while provinces diffuse cultural participation and sustain community-based practices. Recognising and managing these interdependencies will be critical to ensuring that the growth of the CCI&S is not only globally competitive but also spatially inclusive.

6. Policy Implications

The analysis of provinces and metros underscores that the Cultural, Creative, and Sports Industries (CCI&S) are not only economically significant but also highly spatially concentrated. Policy interventions must therefore respond simultaneously to issues of scale, equity, and technological transformation, ensuring that sectoral growth contributes to both global competitiveness and local development.

First, the dominance of Gauteng, Western Cape, and KwaZulu-Natal highlights the need for strategies that leverage metropolitan hubs while diffusing benefits into their surrounding provinces. Johannesburg, Cape Town, Tshwane, and eThekwini already function as anchors of cultural production and international trade; however, without deliberate provincial linkages, the benefits of these hubs risk being spatially enclosed. Policy frameworks should therefore promote urban–rural cultural linkages, enabling surrounding towns and rural districts to integrate into metropolitan creative value chains. For example, craft production in rural Limpopo or Eastern Cape can be scaled through digital distribution platforms linked to urban hubs, ensuring broader participation in national and global markets.

Second, the redistributive role of smaller provinces and metros suggests that policy should not focus solely on high-output hubs. The evidence shows that provinces such as the Northern Cape and Limpopo channel a larger share of CCI&S income to low-income households, even though their absolute contributions are modest. These findings point to the importance of supporting community-based cultural enterprises and local sports initiatives in smaller provinces and secondary metros. Targeted funding for grassroots organisations, infrastructure for community sports, and incubation hubs for crafts and performance can amplify the poverty-alleviation impact of the sector in these regions.

Third, the uneven adoption of digital technologies and artificial intelligence (AI) presents both risks and opportunities. Larger metros are rapidly consolidating their positions as digital creative hubs, integrating AI into film post-production, music, advertising, design, and sports analytics. Yet, smaller metros and rural provinces remain constrained by poor infrastructure and limited digital literacy, exacerbating the risk of widening digital divide. Policy must therefore prioritise inclusive digital transformation: expanding broadband infrastructure in underserved areas, providing training for AI-enabled creative tools, and ensuring that small enterprises and rural creatives are not excluded from emerging digital value chains. Without such interventions, the sector’s growth will reinforce existing inequalities rather than reduce them.

Fourth, the comparative analysis highlights the need to align cultural and creative policies with broader spatial development frameworks. Given that metros and provinces function in complementary ways, strategies should be integrated into spatial planning instruments, such as provincial growth and development strategies (PGDS) and municipal integrated development plans (IDPs). Embedding CCI&S within these frameworks will ensure that cultural and creative industries are recognised as core drivers of local economic development rather than peripheral activities.

Finally, the future of CCI&S requires a stronger focus on skills development and institutional capacity. The sector is evolving rapidly, with AI and digitisation reshaping occupational profiles. Universities and TVET colleges located in metros such as Tshwane, Johannesburg, and Cape Town provide opportunities to embed digital creative skills into curricula. At the same time, provincial training programmes can extend these opportunities to rural areas. Strengthening institutional capacity at provincial and metro levels will be critical to sustaining data collection, monitoring, and policy evaluation, ensuring that interventions are evidence-based and responsive to spatial realities.

In summary, the policy challenge is twofold: to consolidate South Africa’s leading metropolitan hubs as globally competitive creative centres, while simultaneously ensuring that the sector contributes meaningfully to inclusive growth and poverty reduction across provinces. Achieving this balance will require coordinated planning, investment in digital infrastructure, and deliberate efforts to bridge the spatial divide that continues to shape the geography of the CCI&S.

7. Conclusion

This integrated report has demonstrated that the Cultural, Creative and Sports Industries (CCI&S) are a vital and multifaceted component of South Africa's economy, whose contributions extend beyond economic output to encompass employment creation, poverty alleviation, and cultural identity. By combining provincial and metropolitan perspectives, the analysis has provided a spatially grounded understanding of how the sector operates at different scales and how these levels interact to shape the national creative economy.

The findings underscore the extent of spatial concentration in the sector. Gauteng, the Western Cape, and KwaZulu-Natal account for the majority of national CCI&S GDP, employment, and trade, driven by their metropolitan centres of Johannesburg, Tshwane, Cape Town, and eThekwini. These metros serve as anchors of innovation, international trade, and cultural visibility, positioning South Africa competitively in global creative value chains. At the same time, smaller provinces and secondary metros play an essential role in sustaining cultural livelihoods, heritage practices, and grassroots sports initiatives, often contributing disproportionately to poverty reduction. This layered geography demonstrates that while metros act as engines of growth, provinces provide the broader base through which cultural participation and social development are diffused.

The analysis also highlights emerging challenges associated with digitisation and artificial intelligence (AI). Larger metros are advancing rapidly as digital creative hubs, integrating AI into film production, music, design, and sports analytics. Smaller provinces and metropolitan areas, however, remain constrained by limited infrastructure and skills, posing a risk of a widening digital divide. Without deliberate interventions, technological progress could entrench existing inequalities rather than bridge them. At the same time, AI and digital platforms hold transformative potential for connecting rural creatives to global markets, suggesting that inclusive digital transformation must be central to future sector strategies.

Ultimately, the growth trajectory of South Africa's CCI&S depends on balancing global competitiveness with spatial inclusivity. Strengthening metropolitan hubs as internationally recognised centres of cultural production is essential, but this must be complemented by policies that empower smaller provinces and secondary metros to participate meaningfully in the sector. Investments in digital infrastructure, skills development, and urban–rural cultural linkages will be critical to ensuring that the benefits of the creative and sports economy are widely shared.

In conclusion, the CCI&S are not marginal or peripheral to South Africa's development agenda; they are central to shaping a more diverse, resilient, and inclusive economy. By recognising the sector's spatial dynamics and proactively addressing the opportunities and risks of technological change, South Africa can harness its cultural and creative assets not only for economic growth but also for societal transformation.

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