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Measuring and valuing South Africa's cultural and sport economy



Research Report

Chapter 2: Provincial Profiles

Submitted to:
Department of Sports, Arts and Culture

Submitted by:
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South African Cultural Observatory

Report

Provincial Profiles

March 2024

Executive Summary

The Cultural, Creative and Industries Sports Sector (CCI&S) is a priority sector in South Africa. The industry is also prioritised at provincial levels in South Africa, with each of the nine provinces having departments of Sports, Recreation, Arts and Culture. The industry accelerates growth in provincial economies, both directly and indirectly and plays a critical role in job creation and poverty reduction.

While the sector remains pivotal to the job creation and poverty reduction targets, it remains plagued with challenges that continue to hamper the sector's growth prospects. This report explores the role of CCIs and Sports in the provincial economies. This is important to support the development of the industries at ground roots level and assist in the development of policy that is appropriate to the local conditions. Literature on creative economy and regional factors shows that understanding the physical aspects of a place is important to the development of the sector role of local factors that determine the development of the sector (Anna Szopa).

The analysis shows the role played by provinces in relation to the creative and sports industry. The analysis highlights that Gauteng remains a dominant region, contributing 43% to the CCI&S GDP. The Western Cape and KwaZulu Natal also contribute a significant share to CCI&S (17% and 16% respectively).

Gauteng is also the largest contributor to employment, followed by Western cape and KZN. What is also evident in terms of employment in the industry is that cultural and sports workers in these three provinces tend to have secondary and tertiary qualifications. Notable progress is noted in terms of employment of women and youth in the industry, although most jobs are still occupied by males.

With regards to trade, Western Cape has the largest proportion of cultural and sports exports, while Gauteng has the largest share of CCI&S imports.

Province	GDP (RM)	Number of jobs	Tax Revenue (RM)	Low Income Household (RM)	Exports (RM)	Imports (RM)
Gauteng	107,770	411,364	46,594	14,484	3,721	8,643
Western Cape	41,687	181,133	17,621	3,859	4,992	3,510
KwaZulu-Natal	40,194	169,199	17,059	8,764	1,317	1,621
Eastern Cape	17,817	64,866	6,733	4,450	145	148
Limpopo	13,832	64,262	5,595	3,935	67	25
Mpumalanga	9,423	63,039	3,657	1,850	91	36
Free State	9,431	44,677	3,647	1,693	54	25
North West	7,712	43,880	2,898	1,671	65	22
Northern Cape	2,796	11,126	1,014	595	3	2

In addition to GDP, trade and employment, the evaluation shows the importance of the industry in terms of reducing poverty. This is measured through the income generated by the industry that accrues to low-income households. It is interesting that while the industry in Western Cape contributes to low-income households, the value is relatively lower compared to other variable and lands the province in the fifth spot. Further, the industry contributes to public finances through a wide range of taxes, thereby increasing government revenue.

On the domain basis, the Design and Creative Services, followed by Sports and Recreation, were the main contributors to the provinces' performance on terms of GDP, employment and trade, poverty reduction and tax revenue.

On the domain basis, it can be observed that Design and Creative Services, followed by Sports and Recreation, were the main contributors to the provinces' performance on terms of GDP, employment, and trade.

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Abbreviations

CCI	Creative and Cultural Industries
CCI&S	Creative and Cultural Industries and Sports
dtic	Department of Trade, Industry and Competition
GDP	Gross Domestic Product
LMDS	Labor Market Dynamics Survey
OECD	Organization for Economic Development
PWC	Price Water Coopers
SACO	South African Cultural Observatory
STATSSA	Statistics South Africa
SDGS	Sustainable Development Goals
UNCTAD	United Nations Conference for Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
WEF	World Economic Forum

1. Introduction

The Cultural, Creative and Industries Sports Sector (CCI&S) is a priority sector in South Africa. The Accelerated and Shared Growth Initiative of South Africa (ASGISA) has identified the creative industries, particularly the craft and film sectors, as one of the drivers of sustainable economic opportunities and livelihoods for local communities while expanding business opportunities for small, medium, and micro-enterprises (SMMEs). South Africa's creative industry is dominated by the film sector as well as a vibrant arts & crafts industry. Visual Arts and Crafts, Books and Press, and Performance and Celebration are the most significant domains for South Africa's cultural goods trade. The industry is also prioritised at provincial levels in South Africa, with each of the nine provinces having departments of Sports, Recreation, Arts and Culture. The CCI&S accelerate growth in provincial economies, both directly and indirectly¹ and play a critical role in job creation and poverty reduction.

While the sector remains pivotal to the job creation and poverty reduction targets, it remains plagued with challenges that continue to hamper the sector's growth prospects. Some of the challenges include loadshedding, which has resulted in reduced viewing time, high rate of unemployment and inflation, putting pressure on household income and affordability for services such as pay-tv and streaming (Who Owns Who).

The Cultural and Creative Industries (CCI) Masterplan highlighted one of the weaknesses of the of the industry as a critical lack of qualitative and/or quantitative information about the condition of the creative industries across the different Provinces, with most research having focused on Gauteng, Western Cape and KwaZulu-Natal.

1.1. Purpose of the study

This report explores the role of CCIs and Sports in the provincial economies. This is important to support the development of the industries at ground roots level and assist in the development of policy that is appropriate to the local conditions. Literature on creative economy and regional factors shows that understanding the physical aspects of a place is important to the development of the sector role of local factors that determine the development of the sector (Anna Szopa)².

It is in this regard that emphasis is given to understanding the understanding the provincial cultural economies, as a first step to developing successful and sustainable regional cultural policy.

1.2. Scope and project objectives

This report, **Chapter 2: Provincial Profiles**, is the second report of a four-part series. The report outlines:

- Information on the provincial distribution of the Gross Value Added (GVA)³ contribution of the CCSIs to the economies of each of the nine provinces.
- An analysis of the GVA contribution of specific domains (using the UNESCO FCS, 2009 definitions) for each province.
- An analysis of the provincial distribution of the employment contribution of the CCSIs

¹ Combined authorities and the creative industries | Local Government Association

² The Role of Local and Regional Factors in the Development of Creative Clusters, 2016

³ GVA is the value added to all goods and services produced in a country in a time period (excluding intermediate inputs to avoid double counting). It is essentially the same as GDP, except that it does not include taxes and subsidies.

- The identification of comparative employment advantage by province
- A profile of international cultural, creative and sports services trade by province

The table below presents the scope of work for this study, outlining the scope of work for the remainder of the chapter.

Table 1: Scope of Work and Research Reports

Topic
Chapter 1: Macroeconomic Impact Assessment Annual Cultural and Creative Industries Impact Assessment and Development Indicators, comprising the following: • Trends and Indicators: Cultural and Creative Industries • Economic Dynamics: Cultural and Creative Industries • Jobs Impact: Cultural and Creative Industries • Export Dynamics: Indicators of South Africa's Cultural and Creative Industries Beyond Borders • Economic Multipliers: South Africa's Cultural and Creative Industry • Transformation Indicators: South Africa's Cultural and Creative Industry (population group, youth, gender). Annual Sporting Sector Dynamics: Impact Assessment and Development Indicators, comprising the following: • Sports Economy Insights: Economic Trends and Indicators • Conceptualization and definitions of sectors and subsectors in Sport • Economic Dynamics: Sports-driven Economy Analysis • Jobs Impact: Sports-driven Economy • Export Dynamics: Indicators of South Africa's Sports Industry on the World Stage • Economic Multipliers: South Africa's Sports-driven Economy • Transformation Indicators: South Africa's Sports-driven Economy (population group, youth, gender).
Chapter 2: Provincial Profiles Provincial Trends and Indicators: Cultural and Creative Industries • Nine (9) reports covering Provincial GVA, Employment and Trade Provincial Trends and Indicators: Sports-driven Economy • Nine (9) reports covering Provincial GVA, Employment and Trade
Chapter 3: Metropolitan Profiles Metropolitan Trends and Indicators: Cultural and Creative Industries • Eight (8) reports covering Metro GVA, Employment and Trade Metro Trends and Indicators: Sports-driven Economy • Eight (8) reports covering Metro GVA, Employment and Trade
Chapter 4: Quarterly Insights: Key Performance Economic Indicators • Quarterly Trade Pulse: Global Cultural and Creative Industries Development Indicators

- Quarterly Employment Profile: Cultural and Creative Industries Employment Development Indicators
- Global Sporting Economy Indicators: South Africa's Quarterly Sports-driven Economy Trade Scoreboard
- Quarterly Employment Profile: South Africa's Sports-driven Economy Employment Development Indicators

2. Provincial CCI&S Spend Analysis

2.1. Inter-provincial comparison of total provincial expenditure on CCIs

To understand the provincial expenditure in context, it is essential to compare expenditure on programs across all provinces in South Africa.

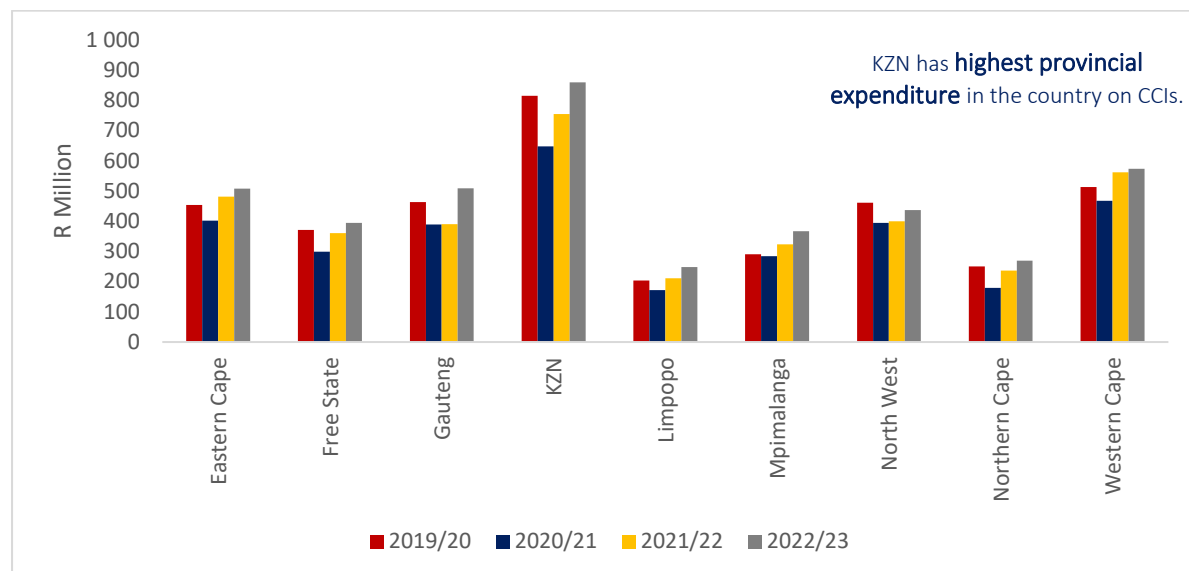


Figure 1: Provincial expenditure on CCIs 2019-2022

KwaZulu-Natal has the highest provincial expenditure in the country on CCIs and Sports. Over the 2019/20 to 2022/23 period, expenditure by provinces increased from R3.8 billion to R4.2 billion, an average increase of 3% per annum.

For the MTEF, provinces will spend R13 billion on CCIs. Total expenditure is anticipated to increase in the MTEF by 5%. The bulk of the expenditure will be from KZN, accounting for 20% of the total spend, followed by Gauteng (14%) and Western Cape (13%).

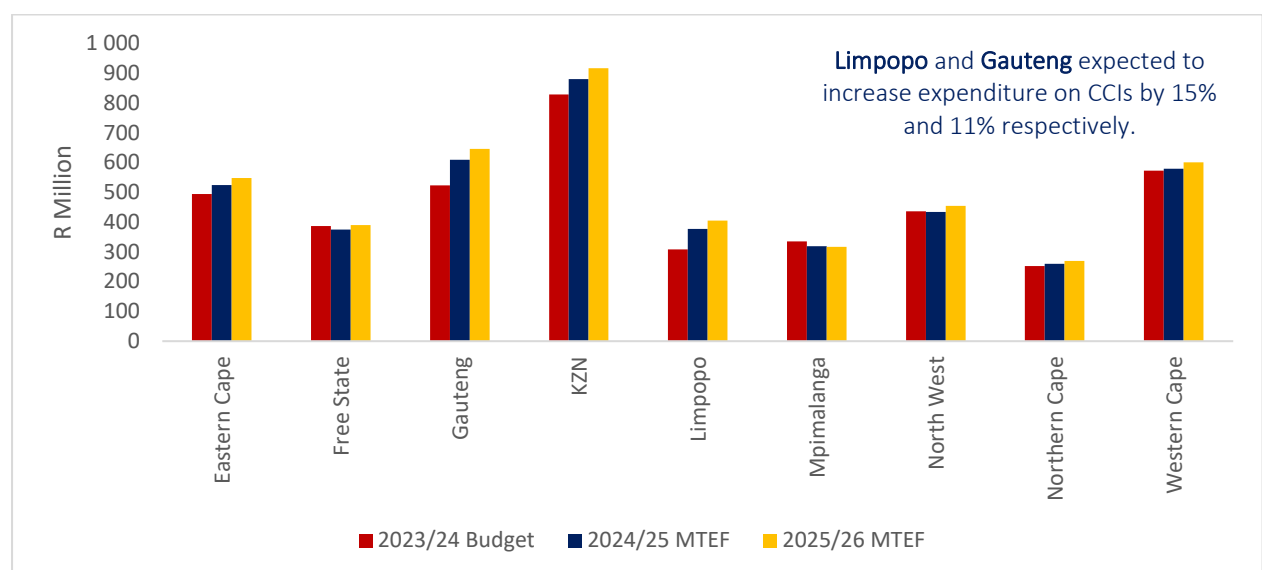


Figure 2: Provincial expenditure on CCIs MTEF

2.2. Inter-provincial comparison of total provincial expenditure on Sports

Between 2019/20 and 2022/23, the total provincial expenditure on Sports was R5.9 billion. In 2019/20 the provinces spend R1.5 billion on sports programs. The spending increased to R1.8 billion in 2022/23, representing a 5% increase per annum.

North West province had the fastest growing provincial expenditure on sports. At 23% per annum, while KZN had the largest share of expenditure on sports, accounting for 23% of provincial spend on sports.

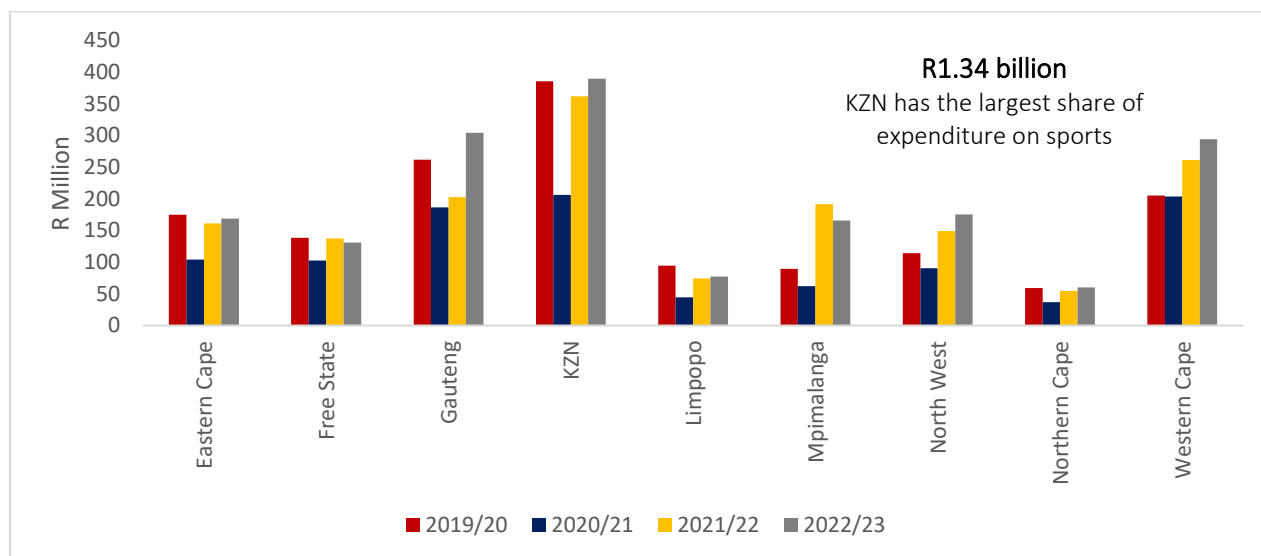


Figure 3: Provincial expenditure on Sports, 2019-2022

The province's total spend on the sports sector in the MTEF is R5.8 billion with an annual growth of 6%. During the MTEF, Gauteng is expected to increase its share of expenditure on sports, from 16% to 20%, while KZN and Western Cape will see a reduction in their share of expenditure on sports from 23% to 21% and 16% to 13% respectively.

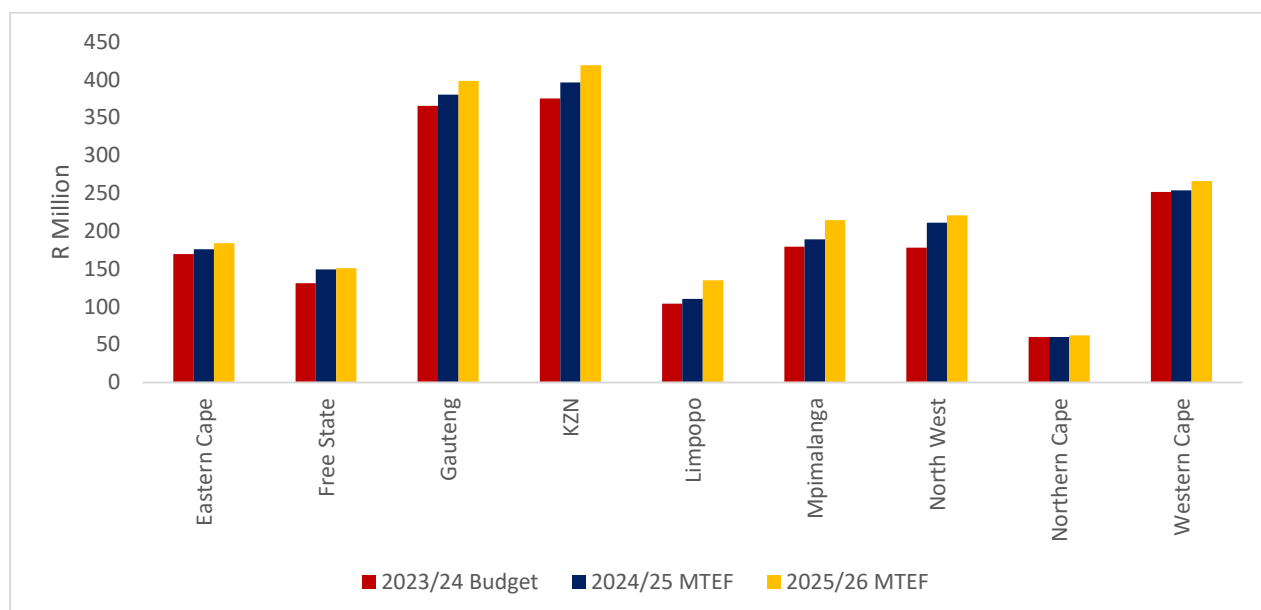
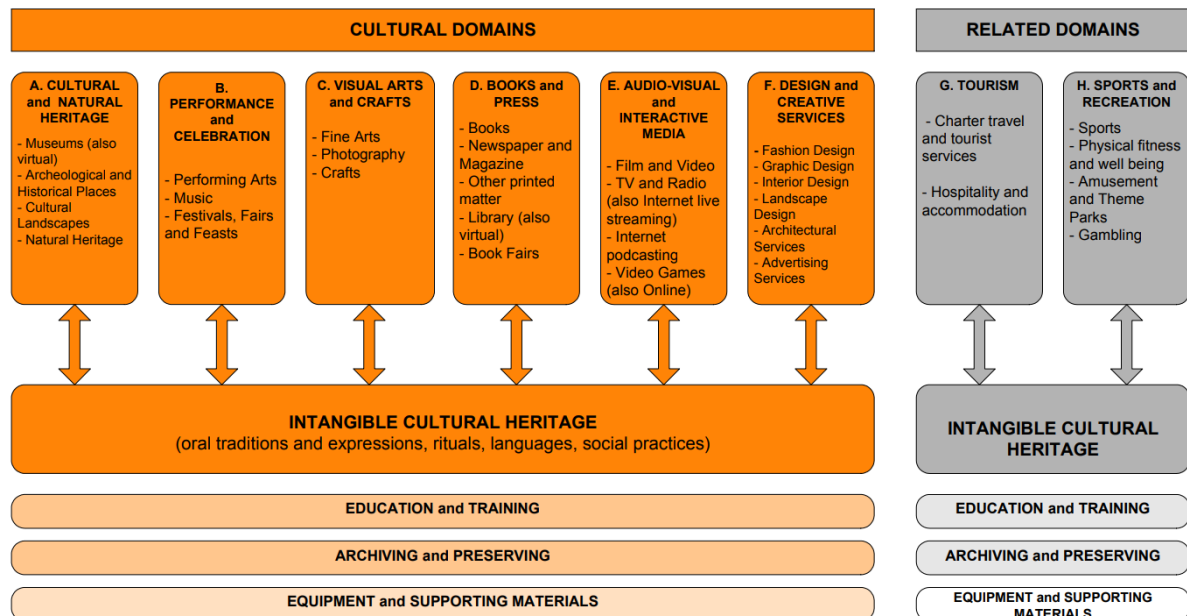


Figure 4: Provincial expenditure on Sports, MTEF

The total provincial expenditures on CCI&S as a percentage of national GDP increased from 0.1% in 2019/20 to 0.2% in 2022/23. Gauteng has the highest ratio of expenditure to GDP from 0.9% in 2019/20 to 1% in 2022/23. Despite having the second highest provincial expenditure on CCI&S in the country, KZN ranks second in terms of expenditure as a percentage of provincial GDP at 0.6%.

3. Methodology to estimate the provincial economic contribution of the CCI&S

This section defines the methodology and data sources used to calculate the contributions of the creative and sports industries in terms of GVA, cultural and sports occupations and trade, in the nine provinces of South Africa. The UNESCO (2009) Framework for Cultural Statistics is used as the basis for the analysis, covering the six domains defined by the framework, as presented below.



Source: UNESCO (2023)

3.1. Provincial GVA Contribution

The methodology described in **Chapter 1: Macroeconomic Impact of CCI&S** extends to this chapter. The Satellite account for the creative and sports industries was constructed, using the System of National Accounts (SNA). The SNA is a set of international guidelines used for the development of country's economic accounts. The statistics are reported to international organisations in a manner comparable across countries. The 2008 SNA, the most recent version, consists of a coherent, consistent, and integrated set of macroeconomic accounts, balance sheets, and tables. The 2008 SNA is based on a set of internationally agreed-upon concepts, definitions, classifications, and accounting rules. It provides a comprehensive accounting framework within which economic data can be compiled and presented in a format designed for purposes of economic analysis, decision-making, and policymaking.

In addition, the SNA provides an overview of economic processes, recording how production is distributed among consumers, businesses, government, and the rest of the world (foreign nations). It shows how income originating in production, modified by taxes and transfers, flows to these groups and how they allocate these flows to consumption, saving, and investment. Consequently, the national accounts are one of the building blocks of macroeconomic statistics forming a basis for economic analysis and policy formulation (UN Statistics Division, 2024).

Broadly, the SNA consists of:

- The Annual Financial Statistics.
- Labour Market Dynamics.
- General Household Survey.

- The Supply and Use Tables.
- Input-Output tables; and
- Social Accounting Matrix.

All the above-mentioned tables are used in the study to compile a Satellite Account for CCI&S. Refer to Chapter 1 for further details on the CCI&S Satellite Account. The macroeconomic aggregates from the modelling process include:

- Provincial GVA
- Provincial Tax Revenue contribution
- Provincial contribution to poverty reduction

3.2. Provincial Cultural and sports Occupations

According to the UNESCO (2009) Framework, the cultural occupations are found in cultural and other industries doing cultural work. UNESCO (2009) Framework defines cultural occupations **“Total of all persons that have a cultural or non-cultural occupation in the culture sector and all persons that have a cultural occupation in the non-cultural sector”**⁴.

According to SACO⁵, cultural occupations can be classified into three, using the Cultural Trident model.

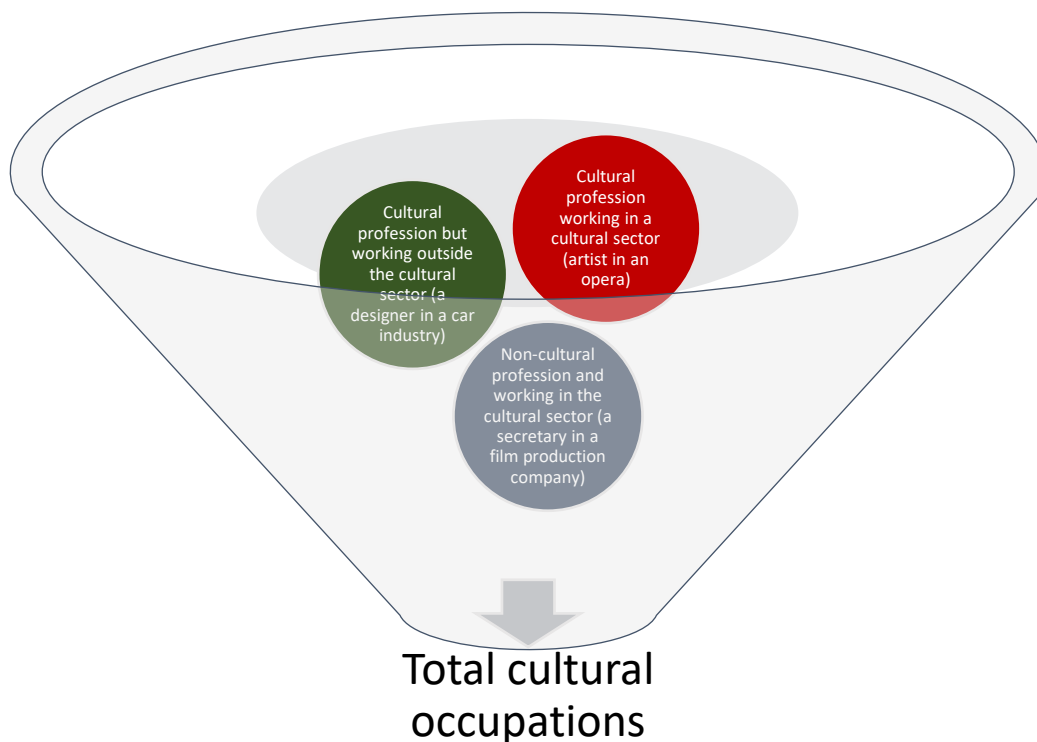


Figure 5: Cultural Trident Model (Higgs and Cunningham, 2008)

⁴ UIS, 2009 UNESCO Framework for Cultural Statistics, 2009.

This report utilised Statistics South Africa's Quarterly Labor Force Survey (QLFS), which gathers quarterly labor market information in all sectors in South Africa. The labour data from the QLFS was used to determine the cultural occupations in the nine provinces of South Africa. The national cultural and sports employment is discussed in detail in Chapter 1: Macroeconomic Impact Assessment of the CCI&S.

Although reference is made to cultural occupations, the analysis also covers occupations in sports as defined in the UNESCO Framework.

3.3. Provincial International Trade

The approach to determine international trade on cultural goods at provincial level is based on trade data collected by SARS and Quantec. Chapter discusses the detailed approach to determining exports and imports of cultural goods. The provincial international trade analysis used South African revenue Services (SARS) data and Quantec data, particularly on imports and exports records. SARS trade data is extracted from the Customs data on Customs Clearance Declarations (CCDs) submitted for importation and exportation. The data is then subjected to internal verification and analysis processes, including analysis by codes and linking products to domains, with the aim to identify and correct anomalies in trade figures during the preparation of the final trade statistics, which are published on the SARS website.

When interpreting the outcome of the analysis, a few points should be noted. First, the current analysis also includes the Sports and Recreation domain, which was not part of the previous reports. The inclusion of the Sports and Recreation domain will result in increased exports and import figures. This is particularly true for provinces such as Gauteng, Western cape and KZN, which are the key drivers of trade in the CCI&S. Secondly, the trade data reported by Quantec and StatsSA does not classify the Sports and Recreation domain the same way as the UNESCO framework, but reports as Toys, games and sports requisites, parts and accessories thereof. This does not necessarily align to the UNESCO framework, which includes sports, physical fitness and wellbeing, amusement and theme parks as well as gambling. The mismatch results in different numbers being reported at local and international levels.

South Africa's trade of sports goods has been increasing over the last couple of years. Recently, South Africa has also witnessed a surge in demand for sports equipment. Globally, South Africa is the 43rd largest importer of sports equipment and the 49th largest exporter of sports equipment⁶. A few reasons can be attributed to this surge. First, there is growing interest in health and fitness. Secondly, South Africa hosts major sporting events, which contributes to increased demand of sporting equipment. A report commissioned by Aon⁷ showed that between 2020 and 2025, the global revenue in the industry is expected to grow at 10.4% per annum. This highlights future expectations of the industry.

Chapter 1 defines the collection of trade data using the six-digit 2007 Harmonised System.

⁶ [Sports Equipment in South Africa | The Observatory of Economic Complexity \(oec.world\)](https://oec.world/en/data/directory/sports-equipment/south-africa)

⁷ https://sre.aon.co.za/media/hmwmbzvp/industry-report_sports-in-south-africa.pdf

4. Provincial Contributions

4.1. Eastern Cape

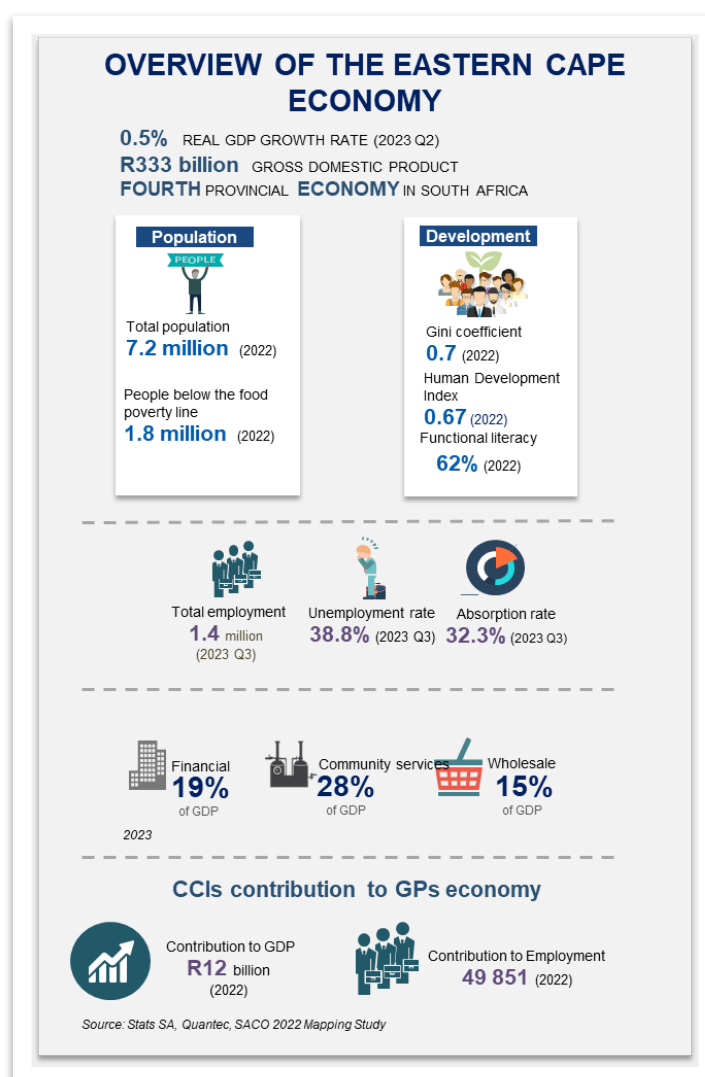
4.1.1. Eastern Cape's economy in context

Eastern Cape had a real GDP quarter-to-quarter growth rate of 0.5% in the second quarter of 2023, a percentage point lower than the national quarter-to-quarter GDP in the same period. In 2022, the province was the fourth largest provincial economy in South Africa, after Gauteng, KwaZulu Natal and the Western Cape, with a nominal GDP of R333 billion.

The main economic sectors contributing to the Eastern Cape's economic growth in 2022 were the finance and business services sector (19%), community services (28%) and the wholesale and retail trade sector (15%).

Eastern Cape had a moderately diversified economy as indicated by the Tress Index score of 52.2 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁸ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Eastern ranked eight amongst the nine provinces, below diversified economies such as Mpumalanga (32.3).

From the CCIs perspective, the industry is vital to the economy of Eastern Cape, contributing about R12 billion to Eastern Cape's GDP and creating 49 850 jobs within the Eastern Cape province.



⁸ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

4.1.2. Eastern Cape's CCI&S Contribution

The CCI&S sector in Eastern Cape generated R17.8 billion in GDP in 2021, representing 7.1% of GDP generated by the CCI&S industry in South Africa. From the perspective of employment, the CCI&S plays a critical role, having contributed 64 866 employment opportunities in 2021 in the Eastern Cape. In addition to creating jobs in the province, the CCI&S has generated income to household amounting to R15 billion, as well as contributing R6.7 billion to public finance.

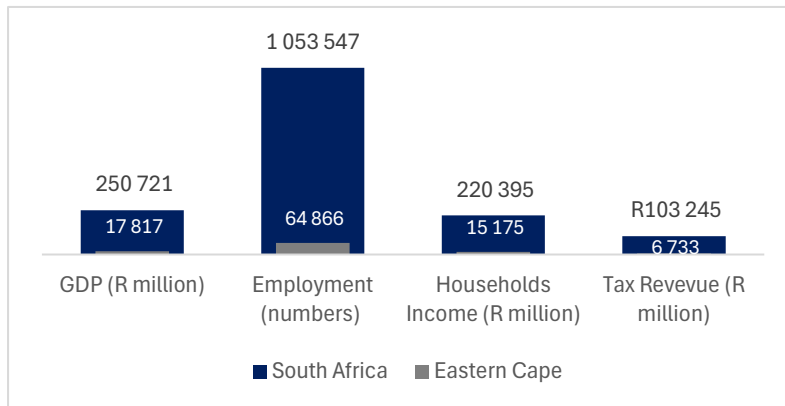


Figure 6: Eastern Cape's CCI&S economic contribution,

4.1.2.1. Contribution to GDP

In 2021, Eastern Cape's GDP was R473 billion (2021 current prices), which represents 7.6% of South Africa's GDP. The CCI&S sector in the Eastern Cape generated a GDP of R17.8 billion in 2021, which equates to 3.8% of the Province's GDP and 7.1% of South Africa's CCI&S industry. Of the 9 provinces of South Africa, the Eastern Cape is the fourth largest contributor to the CCI&S GDP.

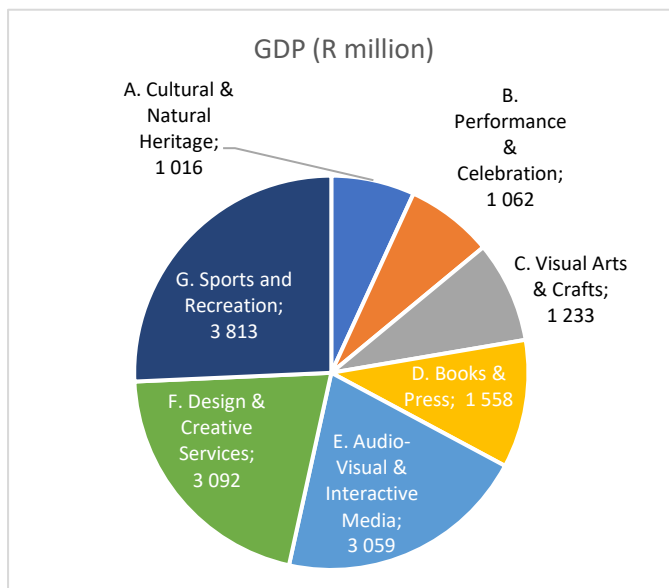


Figure 7: Eastern Cape's CCI&S GDP Contribution by Domain

The figure shows the relative size of the CCI&S domains in the Eastern Cape in 2021 in terms of GDP. The largest contributors to GDP are the Sports and Recreation (26%), Design and Creative Services (21%) and Audio Visual and Interactive Media (21%) domains.

4.1.2.2. Contribution to Cultural and Sports Employment

The cultural and sports economy in the Eastern Cape contributes a significant portion towards employment in the province. In 2021, Eastern Cape total employment was 1,121,256⁹, which is 7.7% of total national employment. During the same period, the cultural and sports industries in the Eastern

⁹ Quantec EasyData

cape employed 64 866¹⁰ individuals, which translates to 6.2% of cultural and sports occupations nationally. The cultural occupations in the Eastern Cape make up 5.5% of the province's total employment.

Of the 64 866 jobs, 22 122 were occupations in the creative industries and occupations in other industries, while 42 477 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in the Eastern Cape.

Table 2: Eastern Cape Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	124	0.2%	5,839	2%
B. Performance & Celebration	4,524	7%	62,582	7%
C. Visual Arts & Crafts	2,313	4%	27,792	8%
D. Books & Press	6,411	10%	148,069	4%
E. Audio-Visual & Interactive Media	25,142	39%	394,952	6%
F. Design & Creative Services	22,381	35%	319,931	7%
G. Sports and Recreation	3,262	5%	61,377	5%
Education	709	1%	33,005	2%
Total	64,866	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that a large proportion of jobs are in the Audio-Visual & Interactive Media and Design & Creative Services domains, which account for 39% and 35% of all cultural and sports occupations in the Eastern Cape.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 64 866 cultural and sports occupations, 49 186 (76%) were occupied by Blacks/Africans, followed by the Coloured population at 15%. Indians make up 1% of the CCI&S employment in the province. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

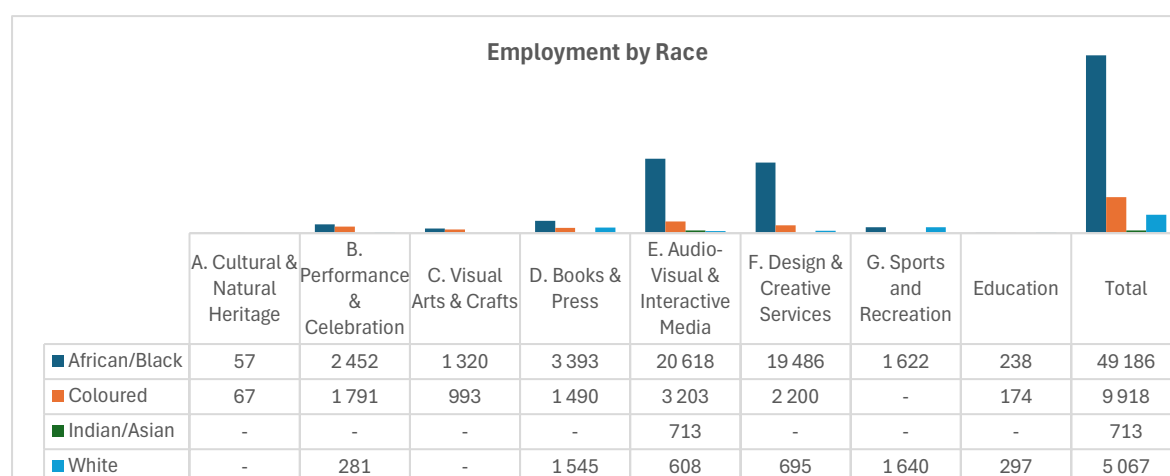
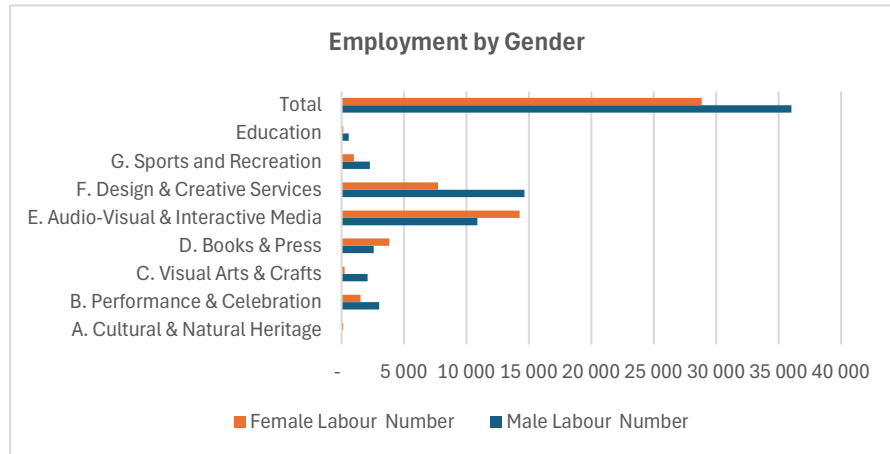


Figure 8: Eastern Cape's CCI&S Occupations by Race

¹⁰ StatsSA LMDS

Of the 64 866 cultural and sports occupations, 36 018 (56%) were occupied by males. This is



particularly profound in the Design and Creative Services domain. This inclination is also observed at the national level, where the proportion of males in cultural occupations surpasses that of females.

Figure 9: Eastern Cape's CCI&S Occupations by Gender

The analysis by age shows that the 35-39 age category had a greater proportion of cultural occupations. In the Eastern Cape, 37% of cultural occupations were occupied by youth (15-34 years), marginally lower than the national average of 38%.

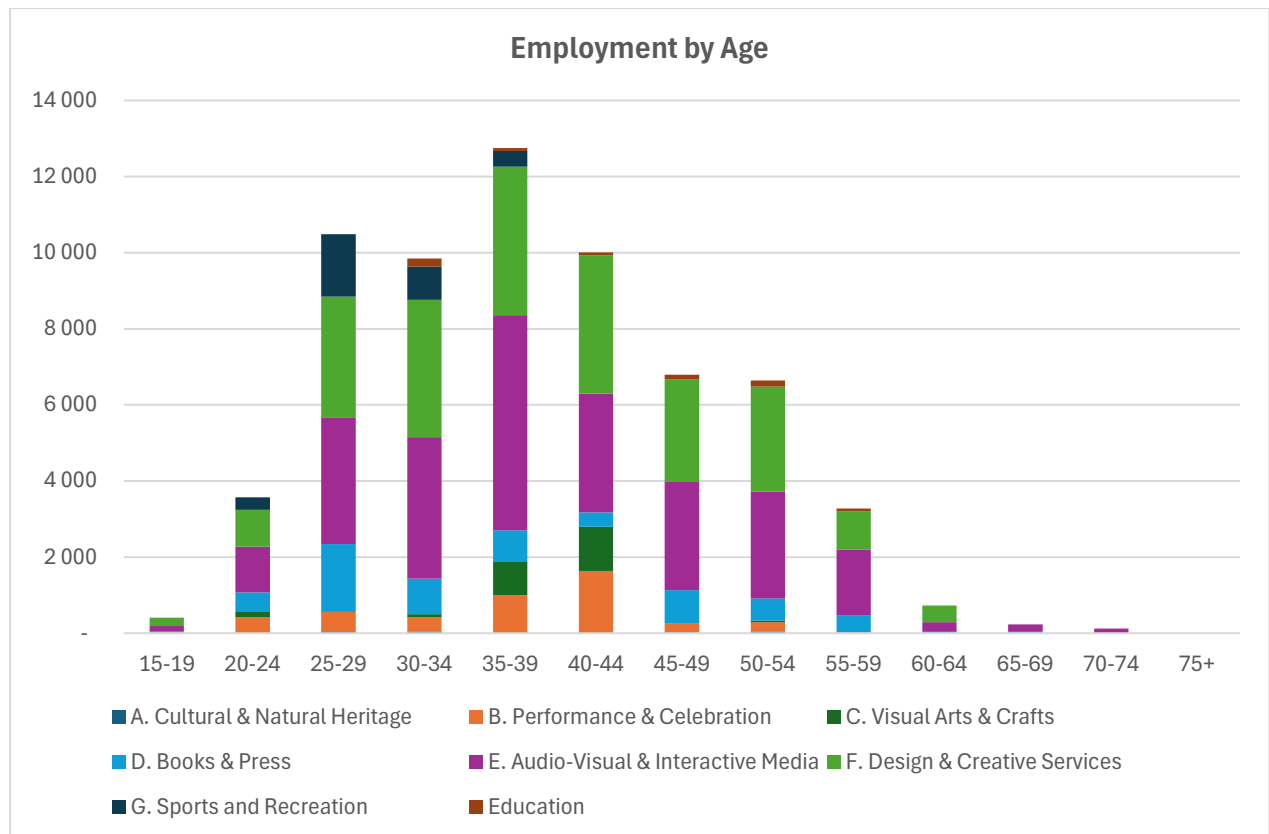
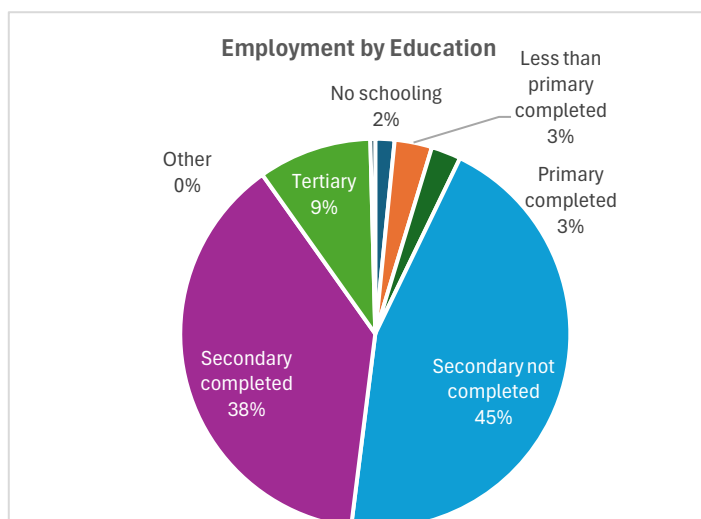


Figure 10: Eastern Cape's CCI&S Occupations by Age

Only 9% of cultural and sports occupations in the Eastern Cape had tertiary education, compared to



the national average for cultural occupations (20%). A significant number (42%) had secondary education completed while 31% had not completed their secondary education. Significant low levels of education can be a constraint for the sector, from a growth and developmental perspective. Provinces with relatively higher levels of education (Gauteng and Western Cape) have seen better growth prospects. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

Figure 11: Eastern Cape's CCI&S Occupations by Education

4.1.2.3. Contribution to Trade

The CCI&S exports in the Eastern Cape was the 4th largest in the country in 2021 at R144.8¹¹ million, up from R118¹² million in 2020. The huge increase is also attributed to the Sports and Recreation domain, which was not part of the analysis in the previous years. This pattern represents the national pattern of CCI&S exports, which has shown an increase in 2021. As a share of total exports in the Eastern Cape, the CCI&S share was 0,22% in 2021, slightly up from 0.2% in 2020. Without the sports domain, the percentage share in 2021 drops to 19%, which is an indication that the exports of cultural goods have not reached pre-covid 19 levels.

The exports of CCI&S by domain in the Eastern Cape is presented in the table below. The Cultural and Natural Heritage, Visual Arts & Crafts and the Sports and Recreation domains are the key driver of CCI&S exports.

Table 3: Eastern cape exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	89.8	108.6	89.7	87.5
Performance and Celebration	1.8	2.5	1.9	4.7
Visual Arts and Crafts	10.0	14.7	23.8	32.4
Books and Press	3.5	4.0	2.8	2.2
Design and Creative Services	-	-	-	-
Sports and Recreation				18.0
CCI&S Exports	105.1	129.8	118.2	144.8
Total Exports	52,920	57,326	59,986	65,034
CCI&S Share of Exports	0.20%	0.23%	0.20%	0.22%

Source: Quantec, SARS

Like the exports of CCI&S in the Eastern Cape, the imports show an increase from R54 million in 2020 to R148 million in 2021, mainly from the Sports domain. The increase in imports also mirrors the movement of imports of CCI&S at national level, where indications are that the imports of CCI&S

¹¹ Includes the exports of sporting goods in 2021

¹² Excludes the exports of sporting goods in 2020

recovered at a faster pace than the exports post the Covid-19 pandemic. As a share of total imports in the Eastern Cape, the CCI&S have increased from 0.13% in 2020 to 0.33% in 2021 (without the Sports domain, the CCI&S share of imports increases to 0.18% in 2021).

Table 4: Eastern cape imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	19.9	17.3	11.8	15.2
Performance and Celebration	3.3	2.3	4.4	4.6
Visual Arts and Crafts	39.6	38.3	23.4	39.6
Books and Press	17.7	20.6	14.1	24.5
Design and Creative Services	-	-	0.1	-
Sports and Recreation				64.2
CCI&S Imports	81	79	54	148
Total Imports	41,131	43,033	40,251	45,278
CCI&S Share of Imports	0.20%	0.18%	0.13%	0.33%

Source: Quantec, SARS

The figure below shows the CCI&S Balance of Trade, including the sports domain. At national level, the imports of sporting goods far exceed the exports of sporting goods. The Eastern Cape shows a similar pattern. The Eastern Cape recorded a positive CCI&S Balance of Trade over the period 2018 to 2021 when the sport trade is excluded.

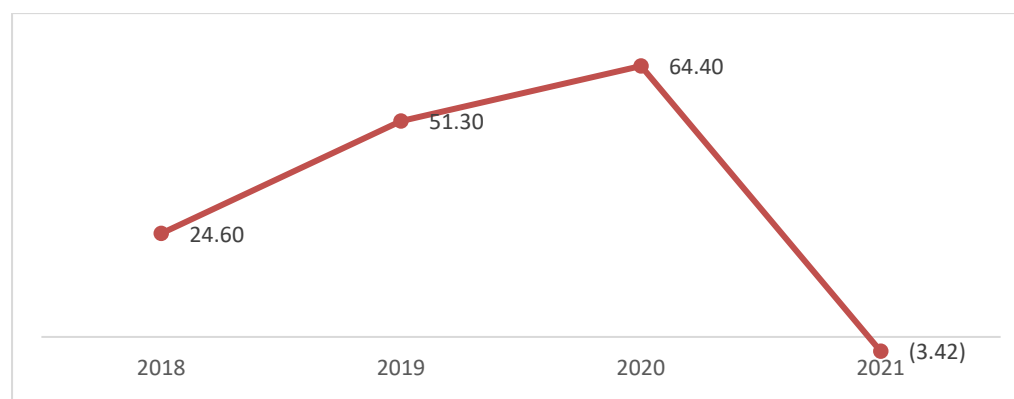


Figure 12: Eastern Cape CCI&S Balance of Trade

4.1.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through

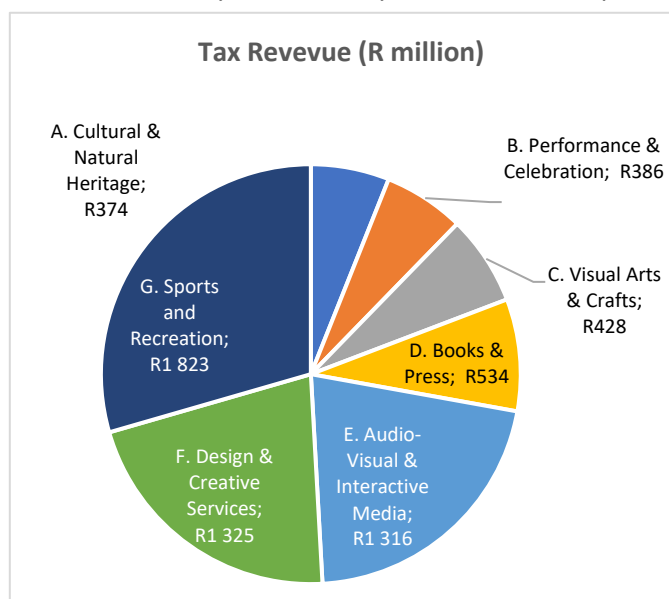


Figure 13: Eastern Cape's CCI&S Tax Revenue Contribution by Domain

a wide range of taxes. During 2021, the CCI&S in the Eastern Cape economy increased total government revenue by an estimated R6.7 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation, Design and Creative Services and Audio-Visual and Interactive Media domains collectively account for over 60% of tax revenue generated by the CCI&S in the Eastern Cape.

4.1.2.5. Contribution to Poverty Reduction

The CCI&S contributes towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by

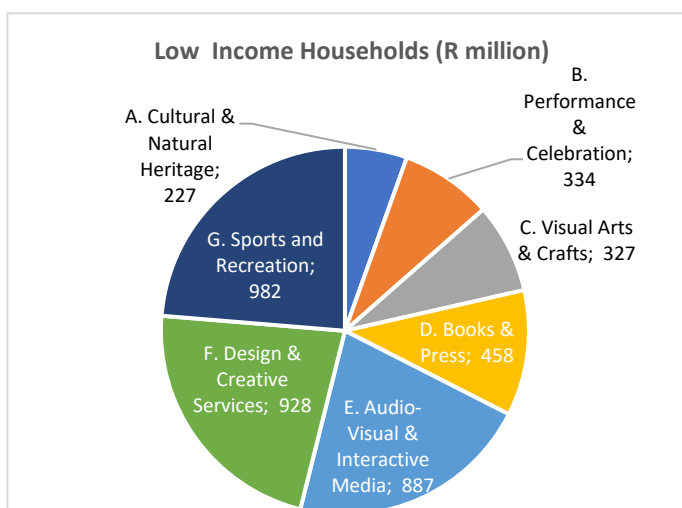


Figure 14: Eastern Cape's CCI&S Domain Contribution to Low Income Household

households in the Eastern Cape was nearly R15.3 billion in 2021, an estimated R4.5 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

The analysis shows that the Sports and Recreation (24%), Design & Creative Services (22%) and Audio-Visual & Interactive Media (21%) domains contribute significantly to reducing poverty in the Eastern Cape, having contributed over 60% of revenue to low-income households.

4.2. Free State

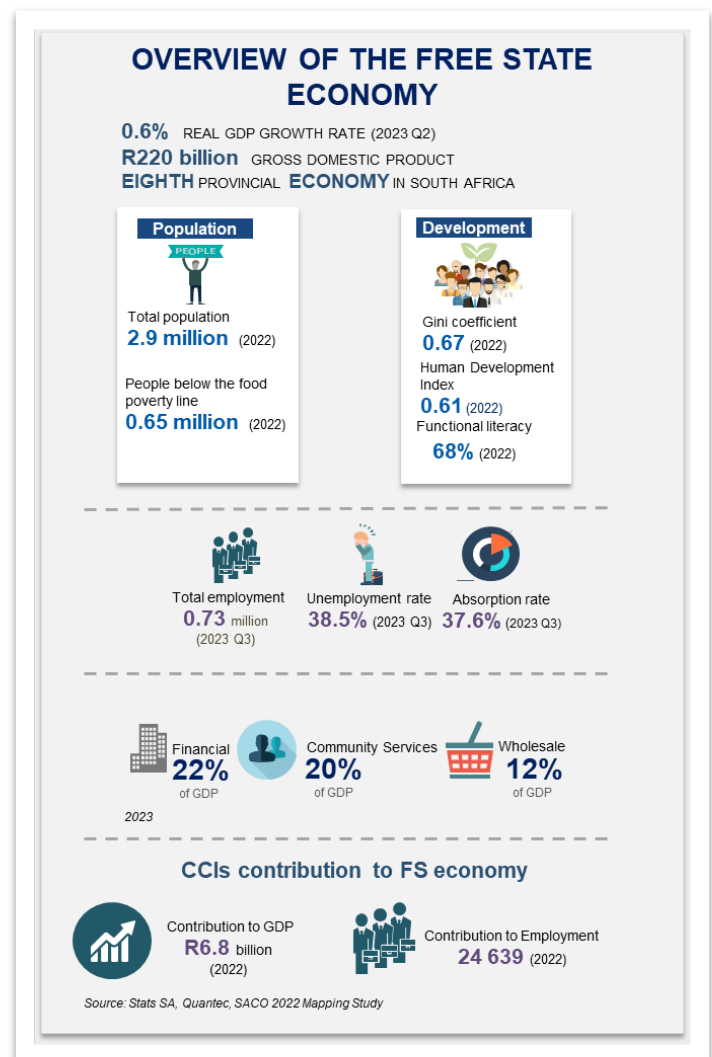
4.2.1. Free State's economy in context

Free State had a real GDP quarter-to-quarter growth rate of 0.6% in the second quarter of 2023, compared to the national quarter-to-quarter GDP in the of 0.6%. The province was the eighth provincial economy in South Africa, with a nominal GDP of R 220 billion.

The main economic sectors contributing to Free State's economic growth in 2022 were the finance and business services sector (22%), community services (20%) and the wholesale and retail trade sector (12%).

Free State had a moderately diversified economy as indicated by the Tress Index score of 35.9 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.¹³ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Free State ranked third amongst the nine provinces,

From the CCIs perspective, the industry contributed about R6.8 billion to Free State's GDP and creating about 24 600 jobs within the Free State province.



¹³ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

4.2.2. Free State CCI&S Contribution

The figure below summarises the contribution of the CCI&S sector in the Free State to the economy of Free State and South Africa. These impacts are analysed in the next sections.

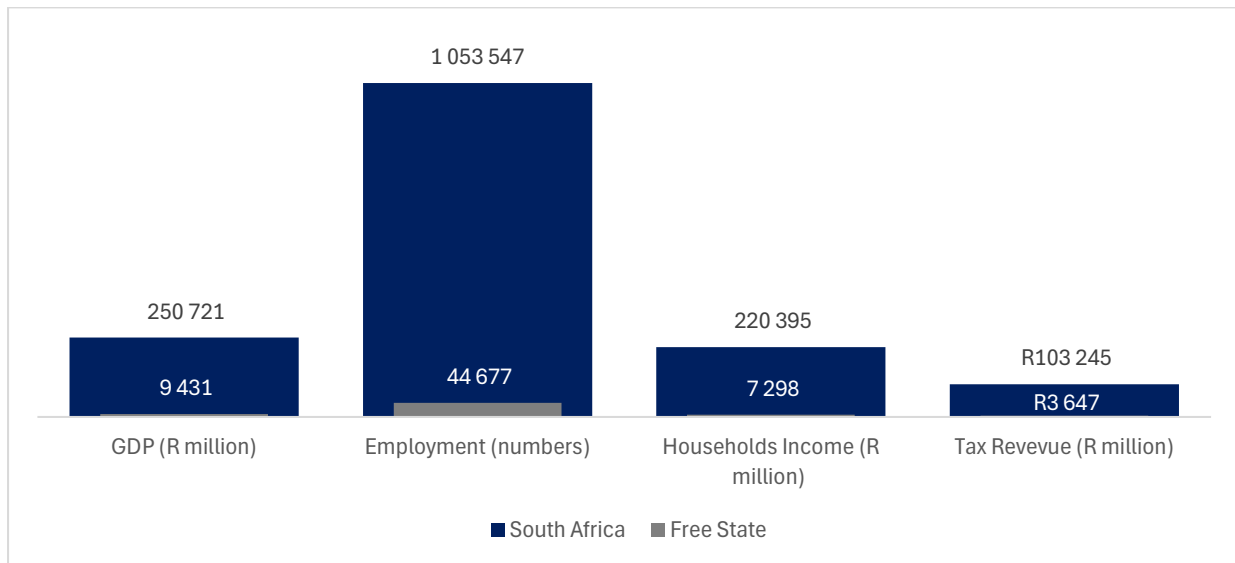


Figure 15: Free State CCI&S economic contribution

4.2.2.1. Contribution to GDP

In 2021, the Free State province had a GDP R306 billion (current prices), which translates to 4.9% to South Africa's GDP. The assessment shows that CCI&S contribution to the province's GDP was R9.4 billion (2021 current prices), which represents 3.1% of the province's total GDP. In 2021, the Free State contributed 3.7% to South Africa's CCI&S GDP.

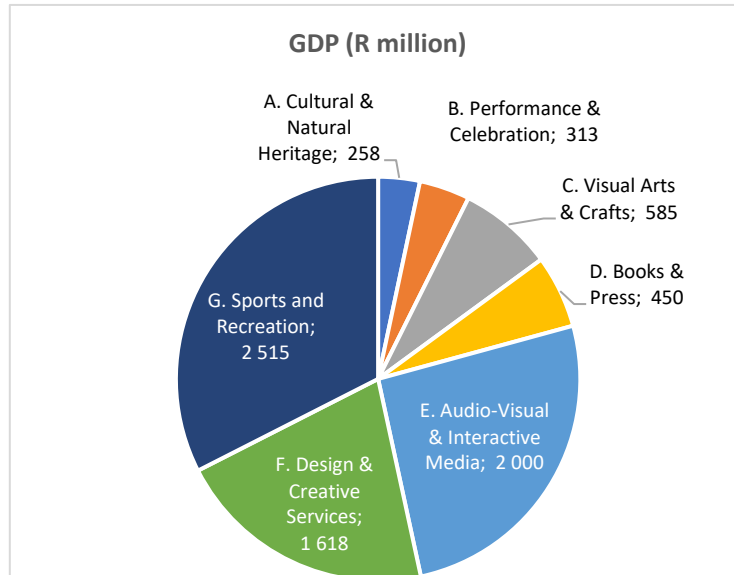


Figure 16: Free State CCI&S GDP Contribution by Domain

The figure below represents the CCI&S sector in the Free State by domain. The Sports and Recreation, Design and creative services and the Audio-Visual & Interactive Media domains collectively account for 79% of the CCI&S GDP contribution in the Free State.

4.2.2.2. Contribution to Cultural and Sports Employment

The creative and sports economy in the Free State contributes a significant portion towards employment in the province. In 2021, Free State total employment was 747 773 ¹⁴, which is 5.2% of total national employment. During the same period, the cultural and sports industries in the Free State employed 44 677¹⁵ individuals, which translates to 4.2% of cultural and sports occupations nationally. The cultural and sports occupations in the Free State make up 6% of the province's total employment.

Of the 44 677 cultural and sports occupations, 15,237 were occupations in the creative industries and creative occupations in other industries, while 29,440 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in the Free State.

Table 5: Free State Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	289	1%	5,839	5%
B. Performance & Celebration	2,149	5%	62,582	3%
C. Visual Arts & Crafts	695	2%	27,792	3%
D. Books & Press	5,508	12%	148,069	4%
E. Audio-Visual & Interactive Media	19,515	44%	394,952	5%
F. Design & Creative Services	12,445	28%	319,931	4%
G. Sports and Recreation	3,831	9%	61,377	6%
Education	245	1%	33,005	1%
Total	44,677	100%	1,053,547	100%

Source: StatsSA LMDS 2021

The above table shows that most jobs are created in the Audio-Visual & Interactive Media and Design & Creative Services domains, which account for 44% and 28% of all cultural and sports occupations in the Free State.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 44 677 cultural and sports occupations, 38 393 (85%) were occupied by Blacks/Africans, followed by the White population at 5 232 (11%). Coloureds make up 1.7% of the CCI&S employment in the province. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

¹⁴ Quantec EasyData

¹⁵ StatsSA LMDS

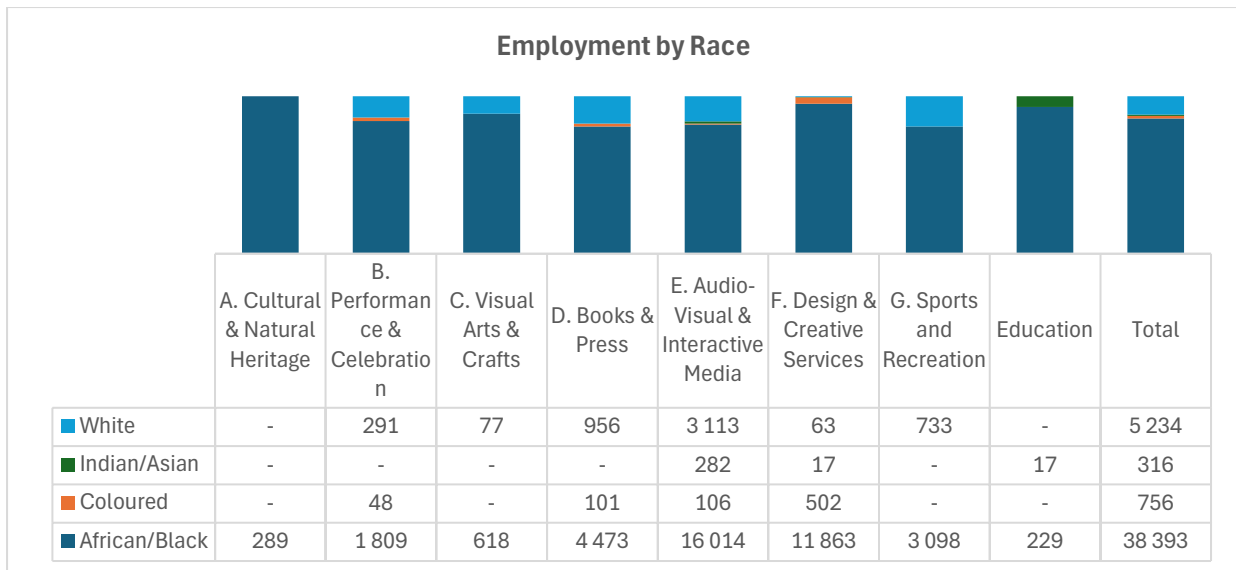


Figure 17: Free State's CCI&S Occupations by Race

Of the 44 677 cultural and sports occupations, 22 826 (56%) were occupied by females. This is particularly profound in the Audio-Visual & Interactive Media domain.

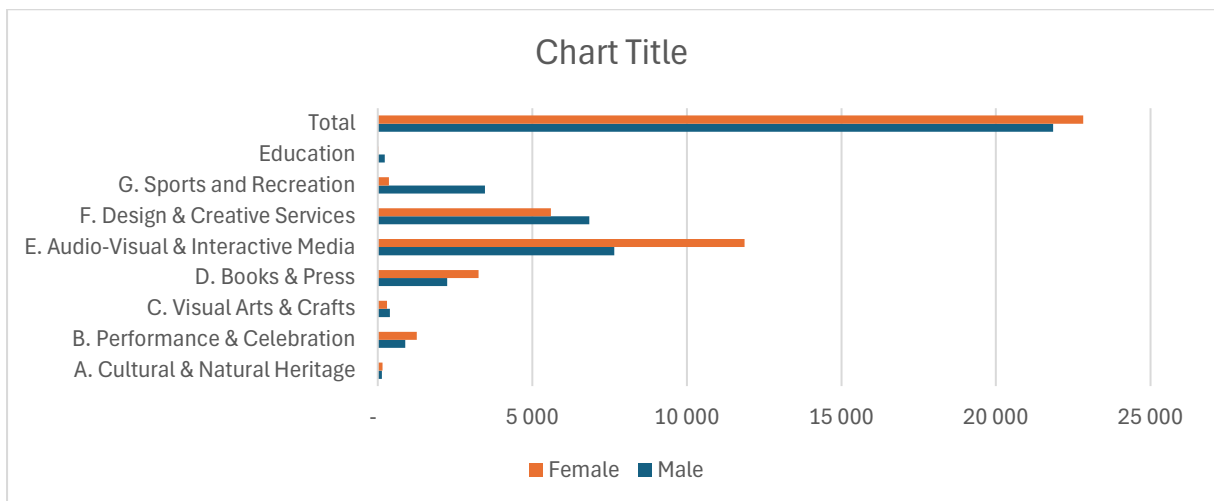


Figure 18: Free State's CCI&S Occupations by Gender

The analysis by age reveals that the 30-34 age category had a greater proportion of cultural and sports occupations. In the Free State, 30% of cultural and sports occupations were occupied by youth (15-34 years), which is lower than the national average of 38%.

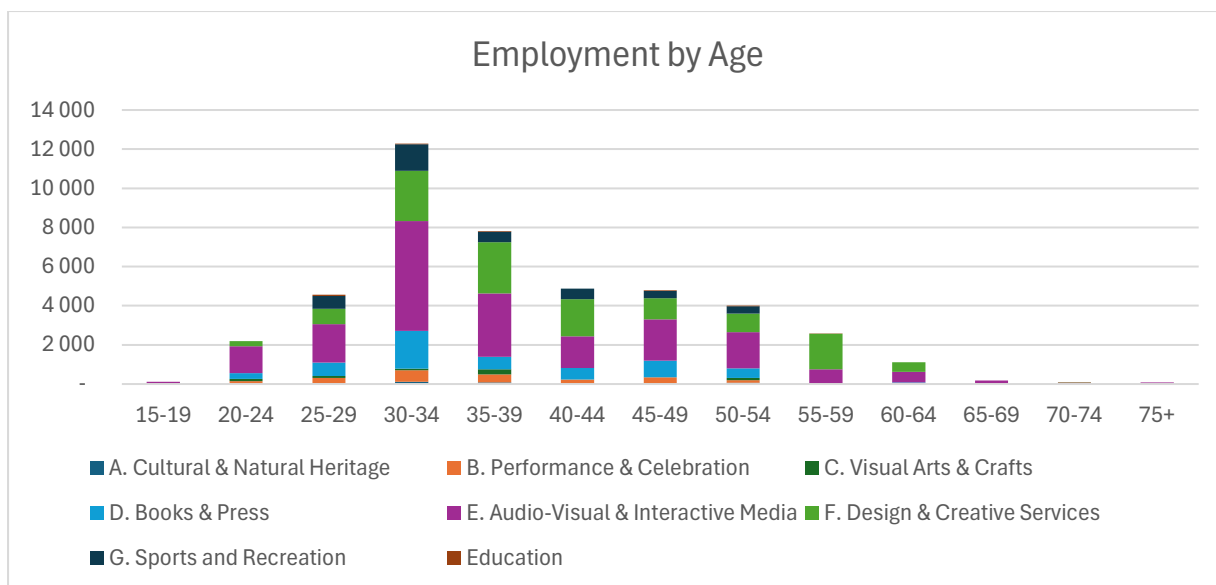


Figure 19: Free State's CCI&S Occupations by Age

With regards to employment by education, 20% of cultural and sports occupations in the Free State

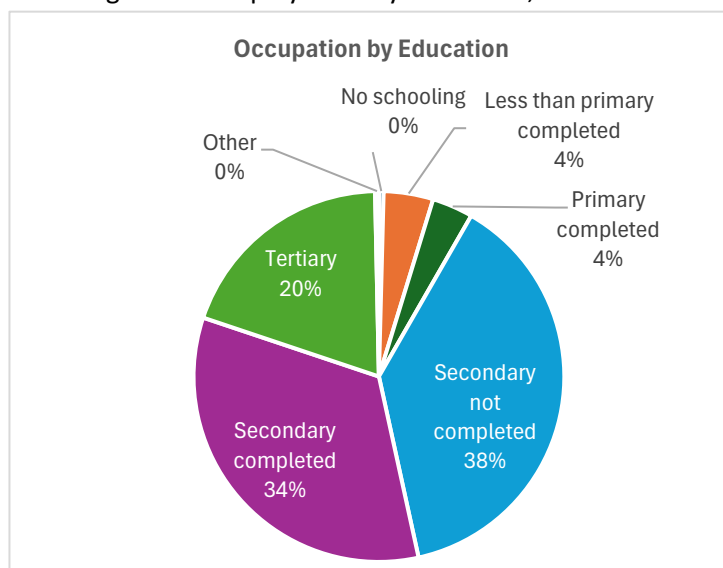


Figure 20: Free State's CCI&S Occupations by Education

had tertiary education, which is in line with the national average of 20%, 34% had secondary education completed while 38% had not completed their secondary education. Significant low levels of education can be a constraint for the sector, from a growth and developmental perspective. Provinces with relatively higher levels of education (Gauteng and Western Cape) in the industry have seen better growth prospects. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

4.2.2.3. Contribution to Trade

The Free State was the eighth largest exporter of cultural and sports goods nationally in 2021, having exported R54.5¹⁶ million worth of cultural goods, up from R38.6¹⁷ million in 2020. This pattern represents the national pattern of CCI&S exports, which has shown an increase in 2021. As a share of total exports in the Free State, the CCI&S share accounted for 0,16% in 2021, up from 0.12% in 2020. The exports of CCI&S by domain in the Free State is presented in the table below, indicating that cultural and sports exports are dominated by the Cultural and Natural Heritage and Visual Arts and Crafts domains.

¹⁶ Includes the exports of sporting goods in 2021

¹⁷ Excludes the exports of sporting goods in 2020

Table 6: Free State exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	21.19	17.50	19.57	20.82
Performance and Celebration	1.75	1.11	0.69	3.26
Visual Arts and Crafts	18.25	11.76	10.16	17.46
Books and Press	14.92	10.08	8.17	8.08
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	0.03	0.02	-	-
Sports and Recreation	-	-	-	4.83
CCI&S Exports	56	40.47	38.59	54.46
Total Exports	20,069	19,646	31,942	35,095
CCI&S Share of Exports	0.28%	0.21%	0.12%	0.16%

Source: Quantec, SARS

The CCI&S imports in the Free State show an improvement from R6.7¹⁸ million in 2020 to R25.2¹⁹ million in 2021. The increase in imports reflects that of national imports of CCI&S, where indications are that the imports of CCI&S have recovered at a faster pace than the exports. As a share of total imports in the Free State, the CCI&S have increased from 0.11% in 2020 to 0.28% in 2021.

Table 7: Free State imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	0.63	1.29	1.19	2.10
Performance and Celebration	0.62	0.79	0.26	1.18
Visual Arts and Crafts	2.00	3.76	3.57	4.80
Books and Press	7.73	6.11	1.65	3.7
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	-	0.01	-	-
Sports and Recreation				13.36
CCI&S Imports	10.98	11.96	6.67	25.16
Total Imports	5,322	5,472	6,214	9,068
CCI&S Share of Imports	0.21%	0.22%	0.11%	0.28%

Source: Quantec, SARS

The Free State CCI&S recorded a positive Balance of Trade over the period 2018 to 2021. In 2019, the Balance of Trade narrowed down but has seen a slight recovery from 2020, although it has not reached 2018 levels. 2021 also recorded a slight drop to R29.3 million.

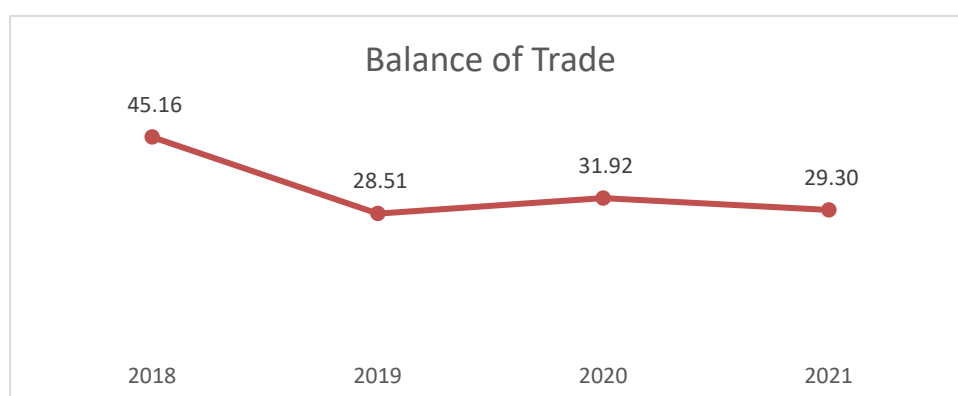


Figure 21: Free State CCI&S Balance of Trade

¹⁸ Excludes imports of sporting goods

¹⁹ Includes imports of sporting goods

4.2.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in the Free State increased total government revenue

by an estimated R3.6 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain accounted for 38% of the tax revenue generated by the CCI&S in the Free State, followed by Audio Visual and Interactive Media (23%) and Design and Creative Services (20%).

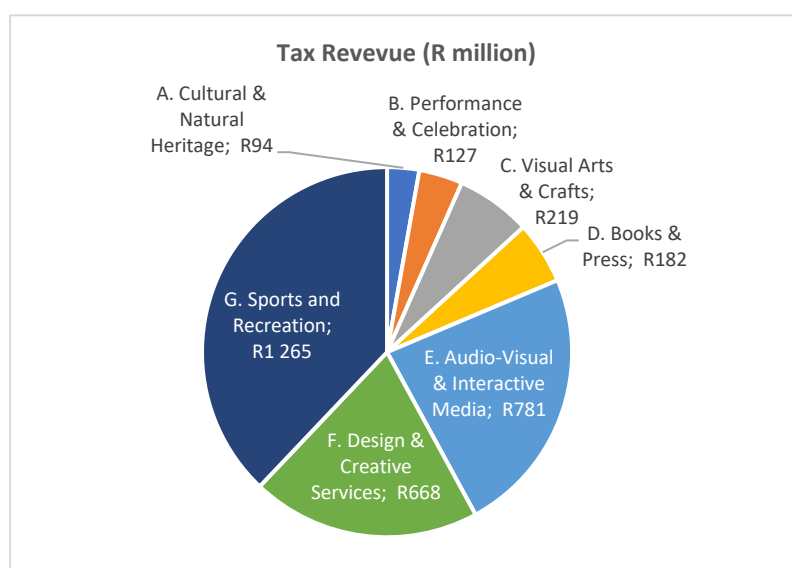


Figure 22: Free State CCI&S Tax Revenue Contribution by Domain

4.2.2.5. Contribution to Poverty Reduction

The CCI&S contributes towards poverty alleviation through its impact on the economic viability of low-

income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in the Free State was nearly R7.3 billion in 2021, an estimated R1.7 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

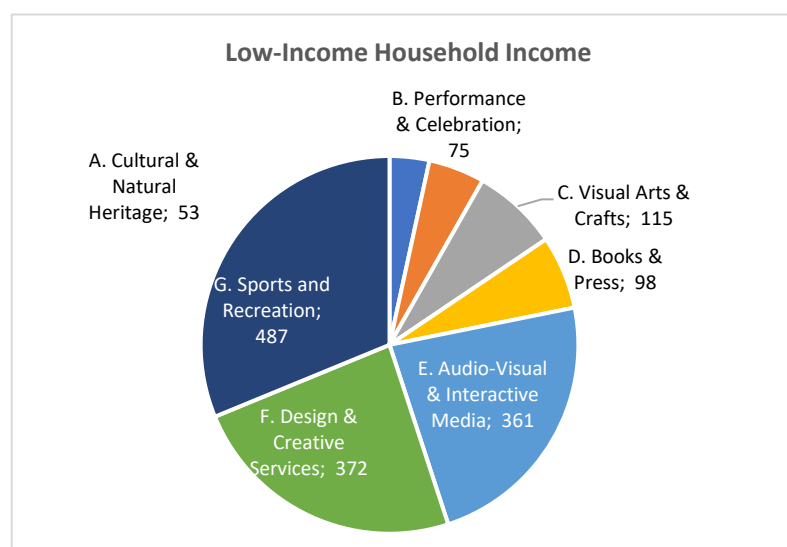


Figure 23: Free State CCI&S Domain Contribution to Low Income Household

4.3. Gauteng

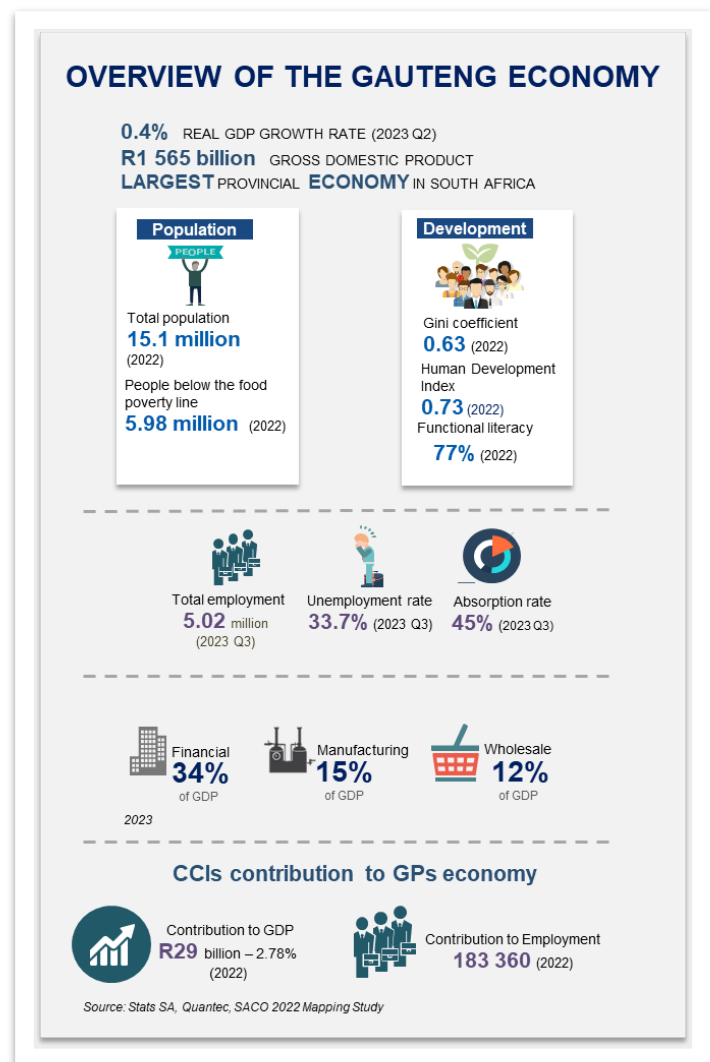
4.3.1. Gauteng's economy in context

Gauteng had a real GDP quarter-to-quarter growth rate of 0.4% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period was 0.6%. In 2022, the province was the largest provincial economy in South Africa, with a nominal GDP of R1 565 billion.

The main economic sectors contributing to Gauteng's economic growth in 2022 were the finance and business services sector (34%), manufacturing (15%) and the wholesale and retail trade sector (12%).

Gauteng had a moderately diversified economy as indicated by the Tress Index score of 56.1 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.²⁰ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Gauteng ranked ninth amongst the nine provinces, below diversified economies such as Mpumalanga (32.3).

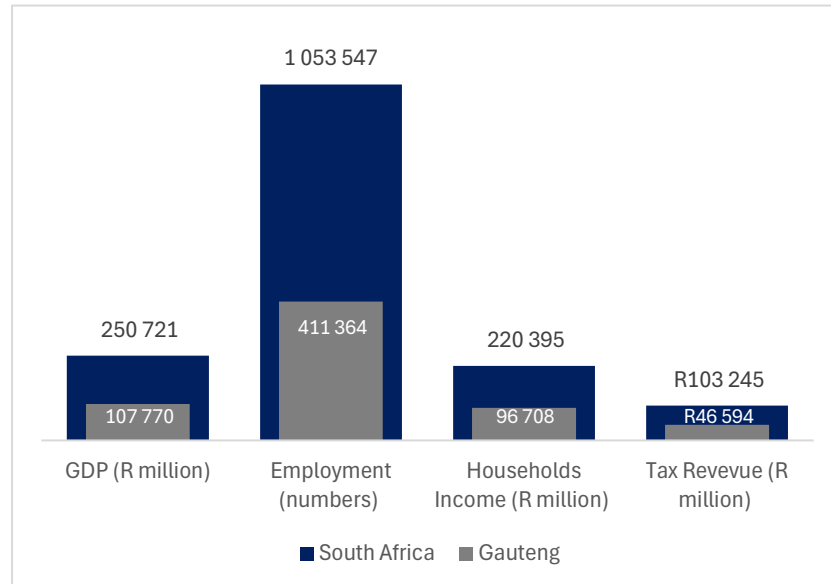
From the CCIs perspective, Gauteng Provincial Government has identified the Creative Industry and as one of the 10 high growth/priority sectors in the Growing Gauteng Together 2030 (GGT2030). Previous reports and other research have highlighted Gauteng as playing a key role in the CCI&S. In the 2020 Mapping study, Gauteng had the largest contribution of all domains and contributes over R29 billion (2,78%) to the Gauteng economy. The domains making the largest contributions were design and creative services (1,22%), books and press (0,60%), transversal cultural education (0,33%) and audiovisual and interactive media (0,26%). Gauteng is the largest employer of creative workers in the country, followed by the Western Cape and KwaZulu-Natal. Similar to the GDP contributions, the largest employment creators are the design and creative services domain, books and press, transversal cultural education, audiovisual and interactive media.



²⁰ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

4.3.2. Gauteng CCI&S Contribution

Gauteng is the economic hub of South Africa (contributes 33% of towards the national economy), and the 7th largest economy in Africa²¹. This section summaries the contribution of Gauteng CCI&S to the national economy. Given the size of the economy of Gauteng, it is not surprising that Gauteng cultural and sports industries boast the largest share of economic contribution nationally.



From a GDP perspective, the CCI&S sector generated approximately R108 billion (2021 current prices) of GDP in Gauteng in 2021, which is about 43% of the total GDP generated by the CCI&S in South Africa. The same holds true for contribution to cultural occupations, household income, and tax revenue, where Gauteng claims the largest share. The figure below illustrates the performance of the CCI&S in Gauteng in 2021.

Figure 24: Gauteng CCI&S economic contribution

4.3.2.1. Contribution to GDP

In 2021, Gauteng had a GDP of R2 042²² billion (market prices), which translates to 32.9% of the national GDP. Gauteng's CCI&S contribution to the province's GDP was R108 billion (market prices), which represents 5.3% of the province's total GDP. Gauteng also accounts for 43% of the CCI&S contribution to national GDP.

The figure below is a representation of Gauteng CCI&S GDP by domain. The Design and Creative Services and the Audio-Visual & Interactive Media Domains collectively account for 53% of the GDP generated CCI&S in Gauteng. This is consistent with previous analysis that highlighted the dominance of these two domains. The Sports and Recreation domain is the third largest domain, accounting for 15% of the CCI&S GDP in Gauteng.

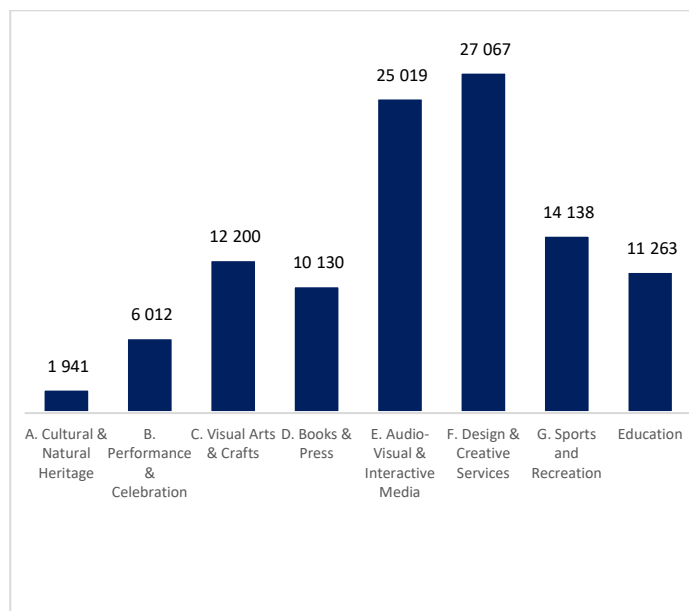


Figure 25: Gauteng CCI&S GDP Contribution by Domain

²¹ Source: African Development Bank data

²² StatsSA

4.3.2.2. Contribution to Cultural and Sports Employment

The creative and sports economy in Gauteng contributes a significant portion towards employment in the province. In 2021, 4.8 million²³ people were employed in Gauteng (33% of national employment). During the same period, the cultural and sports industries in Gauteng employed 411,364²⁴ individuals, which translates to 39% of cultural and sports occupations nationally. The cultural occupations in the Gauteng make up 8.5% of the province's total employment.

Of the 411,364 jobs, 140,293 were occupations in the creative industries and creative occupations in other industries, while 271,071 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in Gauteng.

Table 8: Gauteng Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	2,255	1%	5,839	39%
B. Performance & Celebration	25,605	6%	62,582	41%
C. Visual Arts & Crafts	12,249	3%	27,792	44%
D. Books & Press	61,965	15%	148,069	42%
E. Audio-Visual & Interactive Media	162,193	39%	394,952	41%
F. Design & Creative Services	111,668	27%	319,931	35%
G. Sports and Recreation	19,681	5%	61,377	32%
Education	15,748	4%	33,005	48%
Total	411,364	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that more jobs were created in the Audio-Visual & Interactive Media and Design & Creative Services and Book and Press domains, which account for 39% and 27% and 15% of all cultural and sports occupations in the province.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 411,364 cultural and sports occupations, 292 553 (71%) were occupied by Blacks/Africans, followed by the White population at 96 167 (23%). Coloureds and Indians each make up about 3% of the CCI&S employment in the province. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

²³ Quantec EasyData

²⁴ StatsSA LMDS

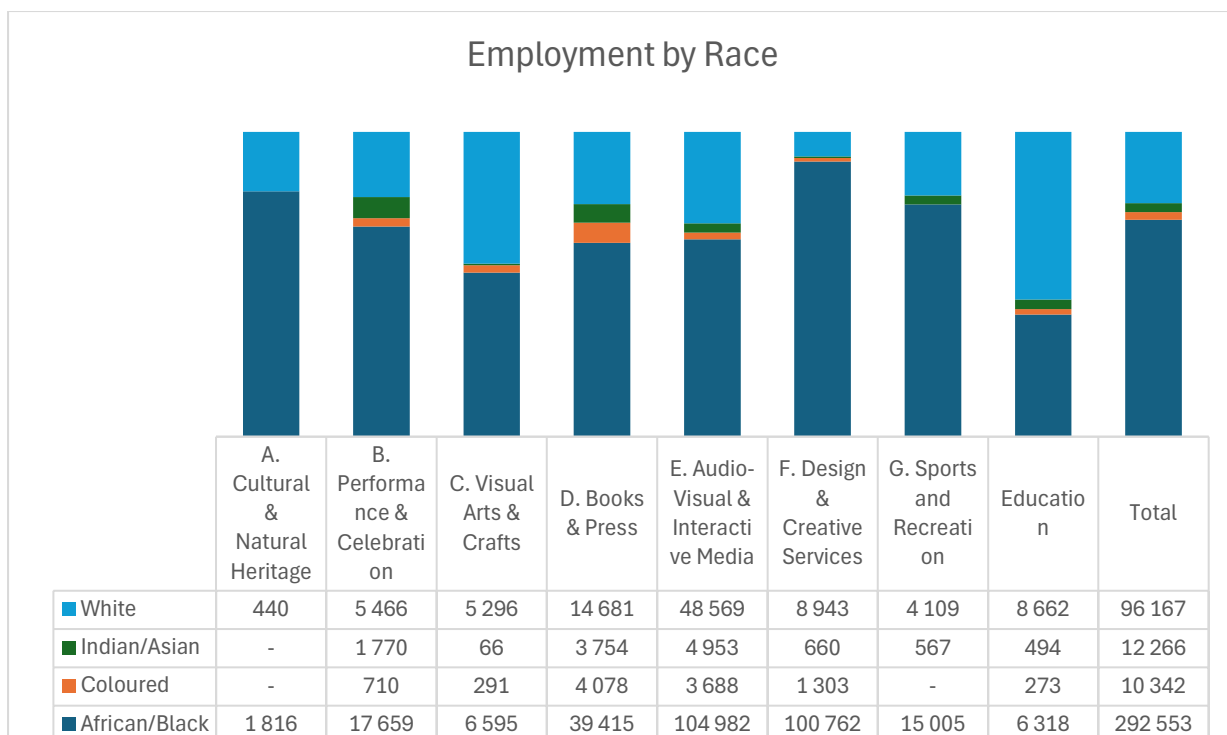


Figure 26: Gauteng's CCI&S Occupations by Race

Of the 411,364 cultural and sports occupations, 233 287 (57%) were occupied by males. This is particularly profound in the Design and Creative Services and Audio-Visual & Interactive Media domains.

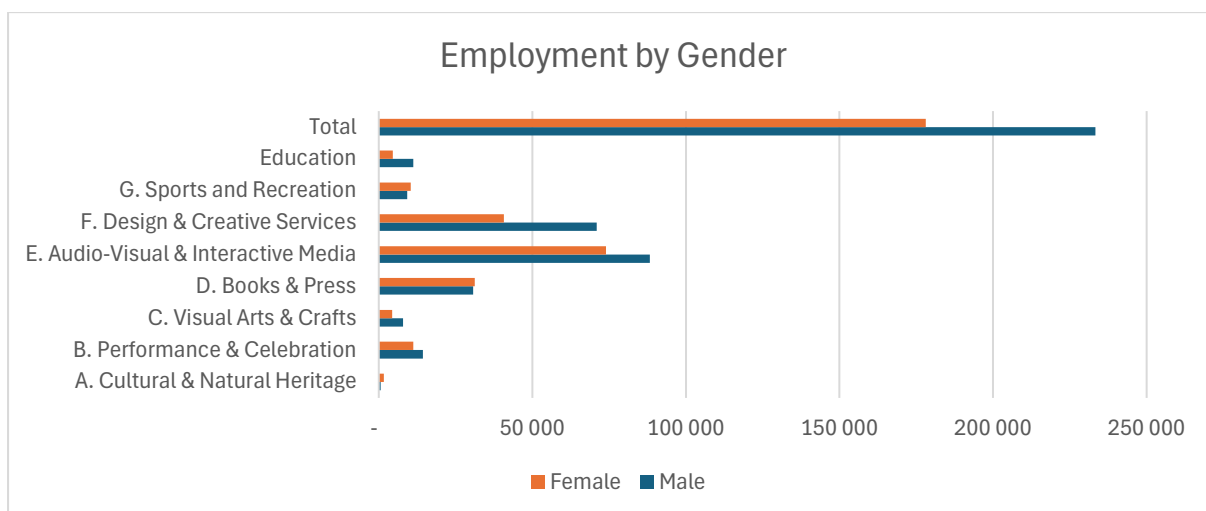


Figure 27: Gauteng's CCI&S Occupations by Gender

The analysis by age demonstrates that the 30-34 age category had a greater proportion of cultural and sports occupations. In Gauteng, 39% of cultural occupations were occupied by youth (15-34 years), which is marginally higher than the national average of 38%.

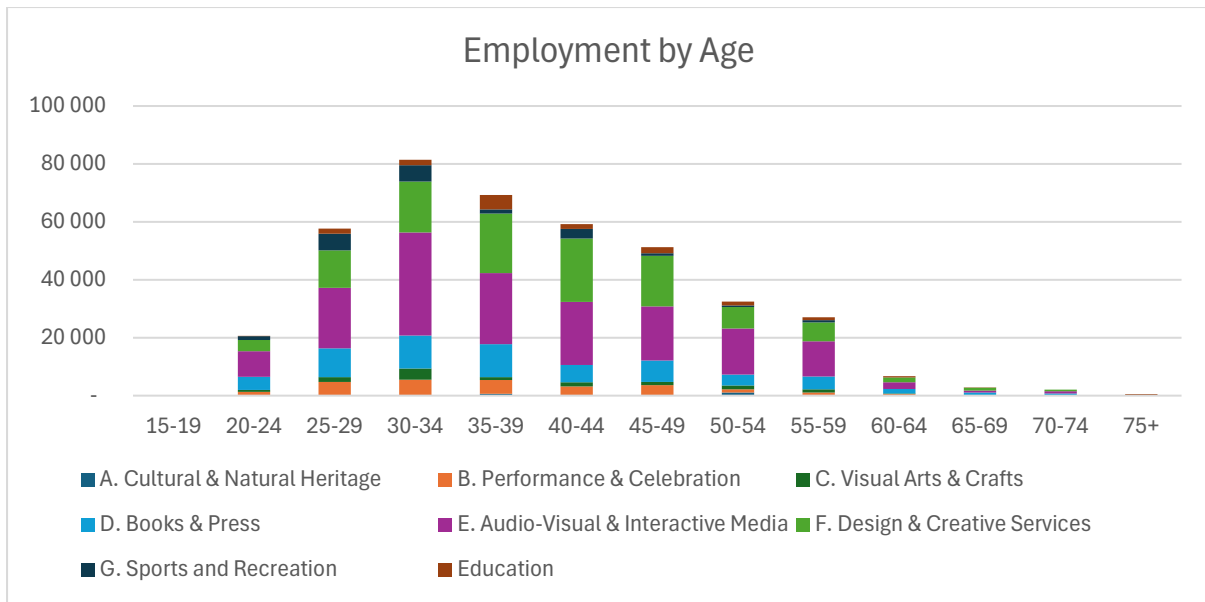


Figure 28 Gauteng's CCI&S Occupations by Age

With regards to employment by education, 26% of cultural and sports occupations in Gauteng had tertiary education, the highest in the country and higher than the national average of 20%. A significant number (43%) had secondary education completed while 26% had not completed their secondary education, compared to the national average of 31%. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

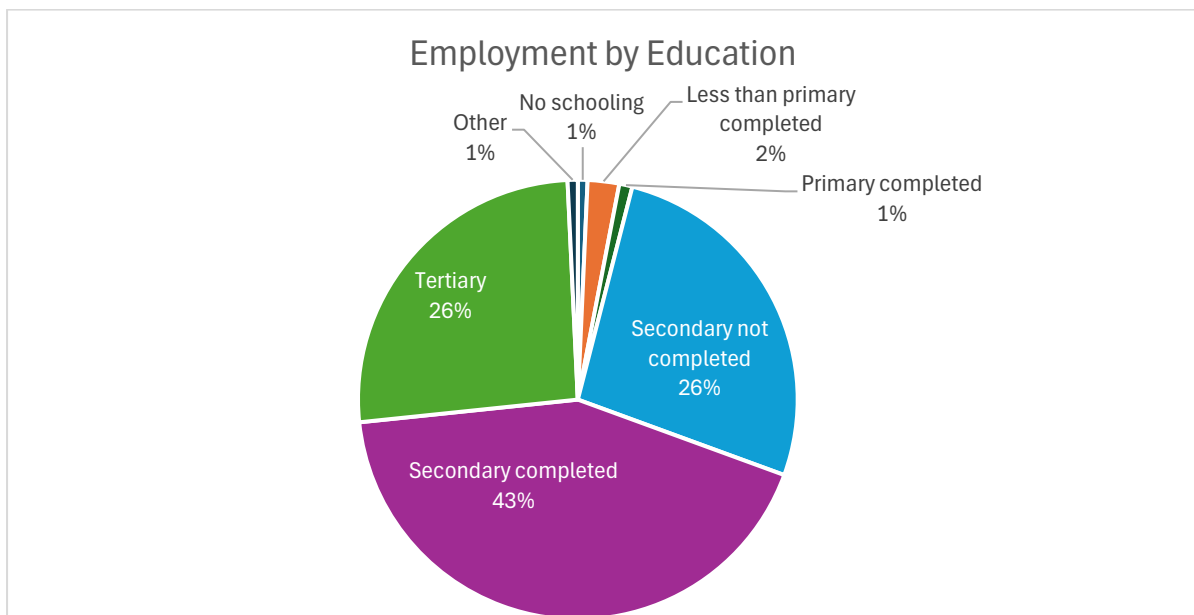


Figure 29: Gauteng's CCI&S Occupations by Education

4.3.2.3. Contribution to Trade

In 2021, Gauteng was the second largest exporter of cultural goods nationally, after the Western Cape, having exported R3.7²⁵ billion worth of cultural goods, up from R3.1²⁶ billion in 2020. This pattern represents the national pattern of CCI&S exports, which shows a recovery in CCI&S exports in 2021. As a share of total exports in the Gauteng, the CCI&S accounted for 0,43% of total exports in Gauteng in 2021, down from 0.45% in 2020 (total Gauteng exports are growing faster than the CCI&S exports). The exports of CCI&S by domain in Gauteng is presented in the table below.

An interesting highlight is a noteworthy decline in the exports of Books and Press domain (55%). This decline can be attributed to several factors, including digitisation, changing reading habits, competition from other media. Who Owns Who explains that digitisation, which has given rise to digital publishing, and the high cost of electricity and internet connectivity could impact the printed products market.

In the main, Gauteng cultural exports are in the Cultural and Natural Heritage and Visual Arts and Crafts domains.

Table 9: Gauteng exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	2,649	1,684	1,281	1,412
Performance and Celebration	230	319	215	333
Visual Arts and Crafts	2,112	1,282	755	1,111
Books and Press	530	468	842	382
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	-	-	-	-
Sports and Recreation	-	-	-	483
CCI&S Exports	5,521	3,753	3,093	3,721
Total Exports	675,609	709,075	685,395	860,628
CCI&S Share of Exports	0.82%	0.53%	0.45%	0.43%

Source: Quantec, SARS

The cultural imports in Gauteng show an improvement from R3.3²⁷ billion in 2020 to R8.6²⁸ billion in 2021. The CCI&S share of imports in Gauteng has also increased from 0.45% in 2020 to 0.95% in 2021. The cultural and sports imports are dominated the Sports, Cultural and Natural Heritage and Visual Arts and Crafts domains. While the exports of Books and Press decreased by 55% in 2021, the imports increased by 51% during the same period. Generally, South Africa has recorded a significant growth in the import of printed books, newspapers, and pictures and Gauteng being the economic hub of the country, mirrors such trends. Additionally, many companies are headquartered in Gauteng and goods destined for other provinces might be recorded at the headquarters (Gauteng).

This increase in imports reflects a combination of economic, educational, and cultural factors.

Table 10: Gauteng imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	897	870	1,178	1,734
Performance and Celebration	1,255	912	743	968.54
Visual Arts and Crafts	1,506	1,265	745	1,130
Books and Press	1,076	957	669	1,009

²⁵ Includes the exports of sporting goods

²⁶ Excludes the exports of sporting goods

²⁷ Excludes imports of sporting goods

²⁸ Includes imports of sporting goods

Audio-visual and Interactive Media	2	-	-	-
Design and Creative Services	2	1	11	-
Sports and Recreation				3,801
CCI&S Imports	4,738	4005	3346	8,643
Total Imports	821,111	854,110	737,118	914,308
CCI&S Share of Imports	0.58%	0.47%	0.45%	0.95%

Source: Quantec, SARS

Gauteng generally has a negative Balance of Trade. From 2019, the CCI&S recorded a negative Balance of Trade. The Balance of Trade widened further in 2021, mainly due to a huge negative Balance of Trade for the Sports and Recreation domain (negative R3 318 million). This trend is also observed at national level, where the imports of sporting goods far outweigh the exports.

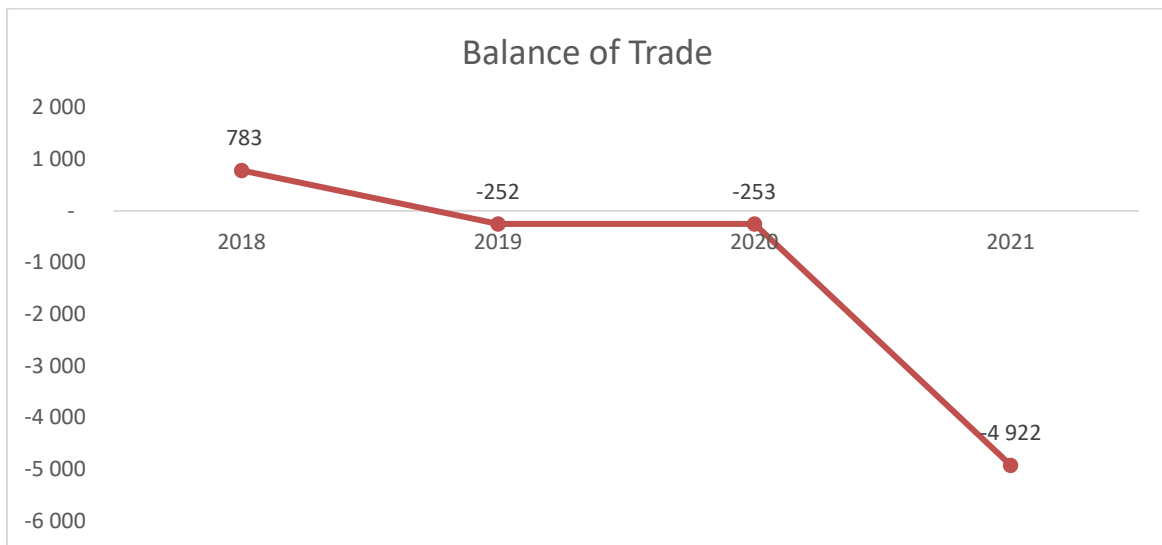


Figure 30: Gauteng CCI&S Balance of Trade

4.3.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in Gauteng economy increased total government revenue by an estimated R46.6 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that Domains E and F collectively account for over 50% of tax revenue generated by the CCI&S in Gauteng.

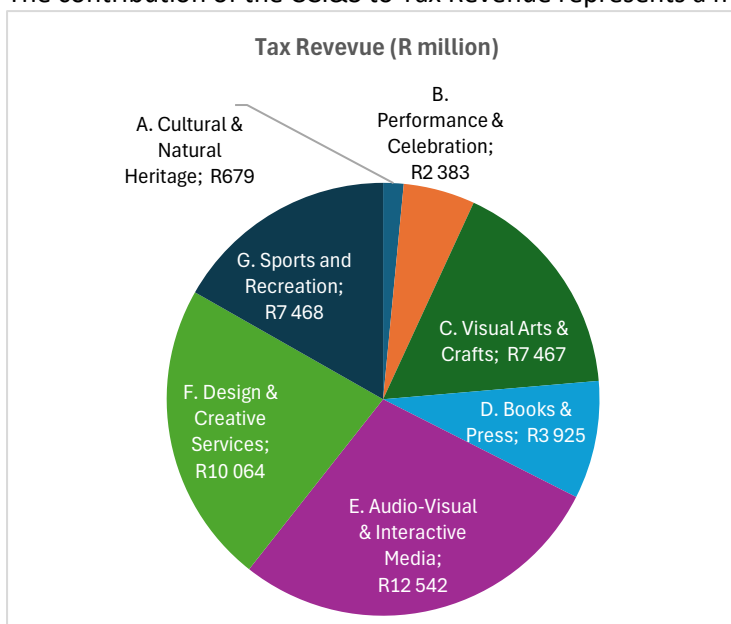


Figure 31: Gauteng CCI&S Tax Revenue Contribution by Domain

4.3.2.5. Contribution to Poverty Reduction

The CCI&S contributes towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in Gauteng was nearly R98.6 billion in 2021, an estimated R14.5 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

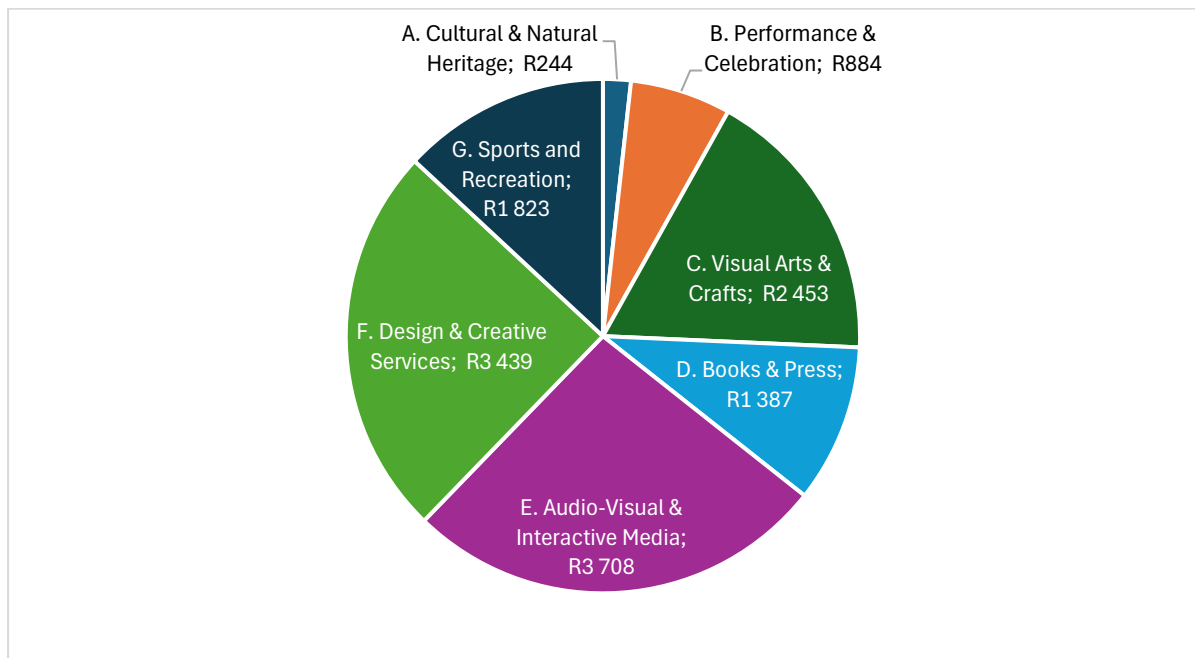
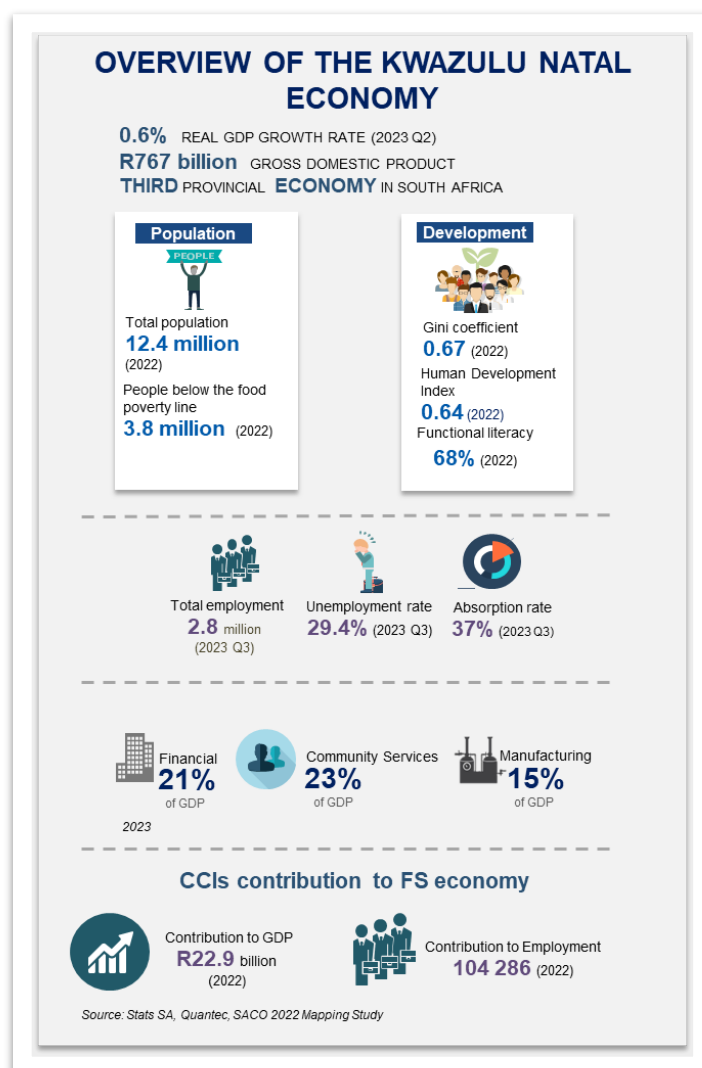


Figure 32: Gauteng CCI&S Domain Contribution to Low Income Household

4.4. KwaZulu Natal

4.4.1. KwaZulu Natal's economy in context

The KwaZulu-Natal province had a real GDP q-o-q growth rate of 0.6% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period expanded by 0.6%. KwaZulu-Natal (KZN) has had an annual average growth rate of 2.9% between 1996 and 2015. KwaZulu-Natal had the third highest average annual growth after Western Cape (3.2%) and Gauteng (3.1%).



The province has the second largest provincial economy in South Africa, with a real GDP of R767 billion in 2022. During this period, the province generated 17% of South Africa's GDP.

The main economic sectors contributing to the province's economic growth in 2022 were the Community Services (23%), Financial Services (21%) and Manufacturing (15%).

KZN had a moderately diversified economy as indicated by the Tress Index score of 41.5 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.²⁹ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification

and minimal vulnerability. KZN ranked fourth amongst the nine provinces.

KwaZulu-Natal had an unemployment rate of 29.4%, which was lower than the national average of 31.9% recorded in the third quarter of 2023.³⁰ The absorption rate, which is the proportion of the working-age population employed, was 37% in the province in the third quarter of 2023. This is lower

²⁹ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

³⁰ StatsSA Statistical release P0211 Quarterly Labour Force Survey Quarter 4:2023

than the South African absorption rate of 41%. Total employment in the province was 2.8 million in this quarter.

In addition to high unemployment, income inequality burdens the province. In 2022, KwaZulu-Natal's Gini-coefficient³¹ was 0.67, which is the fifth highest of the nine provinces.³² The United Nations Development Programme's Human Development Index (HDI)³³ of 0.737 in 2020 indicated that human development was in the medium range of 0.7 to 0.799.³⁴ An HDI score of 1 indicates a high level of economic development, 0 a very low level. KwaZulu-Natal's HDI was lower than the national HDI of 0.68. A further economic and social challenge is the high level of poverty facing KwaZulu-Natal residents. In 2022, as estimated 3.8 million (33%) individuals lived below the food poverty line of R636, a smaller share than the national average of 35%.³⁵

KwaZulu Natal has identified the Creative Industries as one of the priority sectors that have the potential to grow and contribute to the KwaZulu-Natal province and thereby creating much-needed jobs. The creative industry contributed R22.9 billion to GDP in 2022 and 104 286 jobs.

4.4.2. KwaZulu Natal CCI&S Contribution

KwaZulu Natal is the second largest economy of South Africa (contributing 15.9% of towards the national economy in 2021). This sections summaries the contribution of KZN CCI&S to the national economy. The CCI&S industry generated approximately R40.2 billion (2021 current prices) of GDP in KZN in 2021, which is about 16.1% of the total GDP generated by the CCI&S in South Africa. The contribution of CCI&S in KZN is summarised in the figure below.

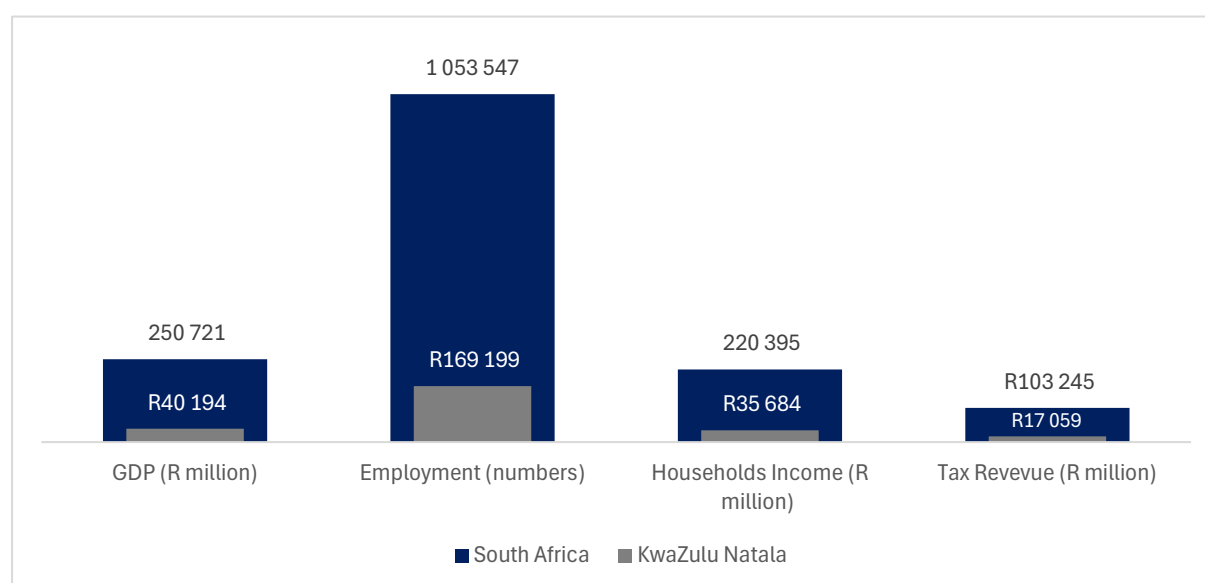


Figure 33: KwaZulu Natal CCI&S economic contribution

³¹ The Gini-coefficient measures income inequality. This measure ranges from zero to one, zero indicating perfect equality and one indicating a situation where one household all earns all the income.

³² Quantec, 2022

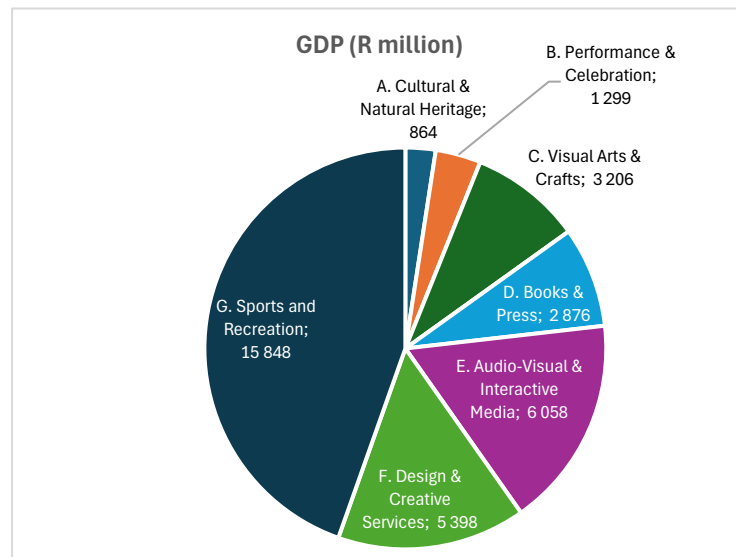
³³ The HDI is "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living."

³⁴ UNDP Human Development Report 2021/2022

³⁵ Quantec, 2022

4.4.2.1. Contribution to GDP

In 2021, KZN had a GDP of R990³⁶ billion (market prices), which translates to 15.9% of the national GDP. KZN's



CCI&S contribution to the province's GDP was R40.2 billion (market prices), which represents 4.1% of the province's total GDP. KZN also accounts for 16.1% of the CCI&S contribution to national GDP. The figure below is a representation of KZN CCI&S by domain. The Sports and Recreation Domain is the largest contributor to the CCI&S GDP in KZN, boasting a 45% contribution (R15.6 billion).

The Design and Creative Services and the Audio-Visual & Interactive Media Domains collectively account for 23% of the GDP generated CCI&S in KZN.

Figure 34: KwaZulu Natal CCI&S GDP Contribution by Domain

4.4.2.2. Contribution to Cultural and Sports Employment

In 2021, 2.3 million people were employed in KZN (15.6% of national employment), making it the third largest province nationally in terms of employment. During the same period, the cultural and sports industries in KZN employed 169 199³⁷ individuals, which translates to 16.1% of cultural and sports occupations nationally. The cultural occupations in the KZN make up 7.5% of the province's total employment.

Of the 169 199 cultural and sports occupations, 57 704 were creative occupations in the creative industries and creative occupations in other industries, while 111,495 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in KZN.

Table 11: KZN Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	930	1%	5,839	16%
B. Performance & Celebration	10,893	6%	62,582	17%
C. Visual Arts & Crafts	4,482	3%	27,792	16%
D. Books & Press	22,707	13%	148,069	15%
E. Audio-Visual & Interactive Media	59,408	35%	394,952	15%
F. Design & Creative Services	53,857	32%	319,931	17%
G. Sports and Recreation	13,352	8%	61,377	22%
Education	3,570	2%	33,005	11%
Total	169,199	100%	1,053,547	

Source: StatsSA LMDS 2021

³⁶ StatsSA

³⁷ StatsSA LMDS

The above table shows that more jobs were created in the Audio-Visual & Interactive Media and Design & Creative Services and Book and Press domains, which account for 35% and 32% and 13% of all cultural occupations in the province. The sports domain contributed 8%.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 169,199 cultural and sports occupations, 292 553 (71%) were occupied by Blacks/Africans individuals, followed by the Indians/Asians at 21 422 (13%). Whites make up 5% of the CCI&S employment in the province. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

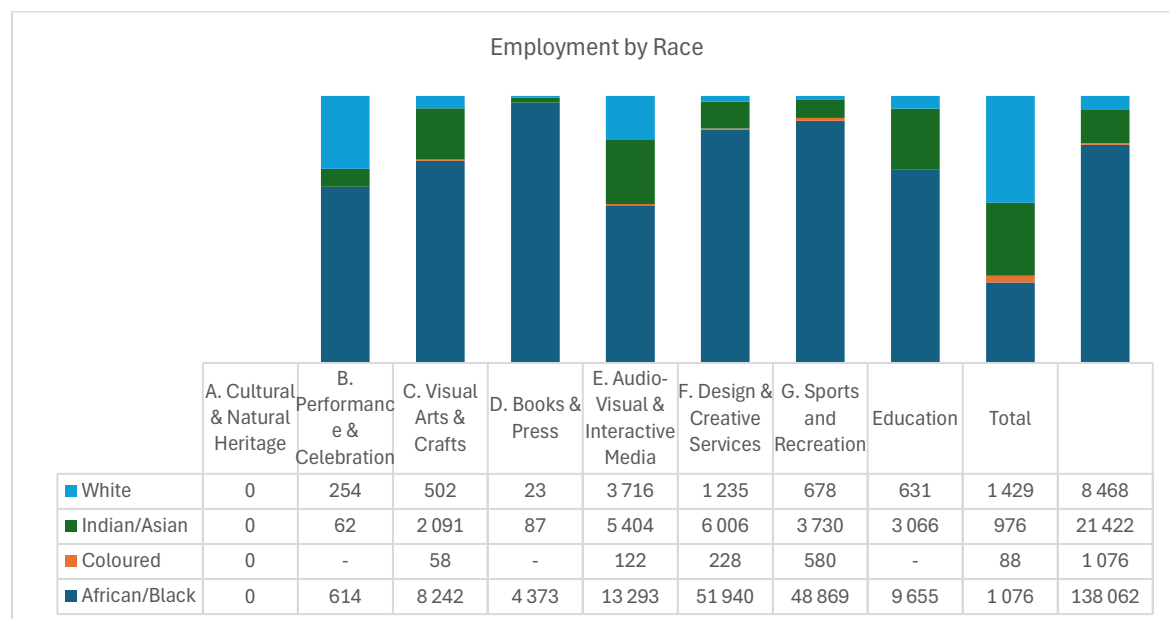


Figure 35: KZN's CCI&S Occupations by Race

Of the 169,199 cultural and sports occupations, 100 747 (60%) were occupied by males. This is particularly profound in the Design and Creative Services and Audio-Visual & Interactive Media domains.

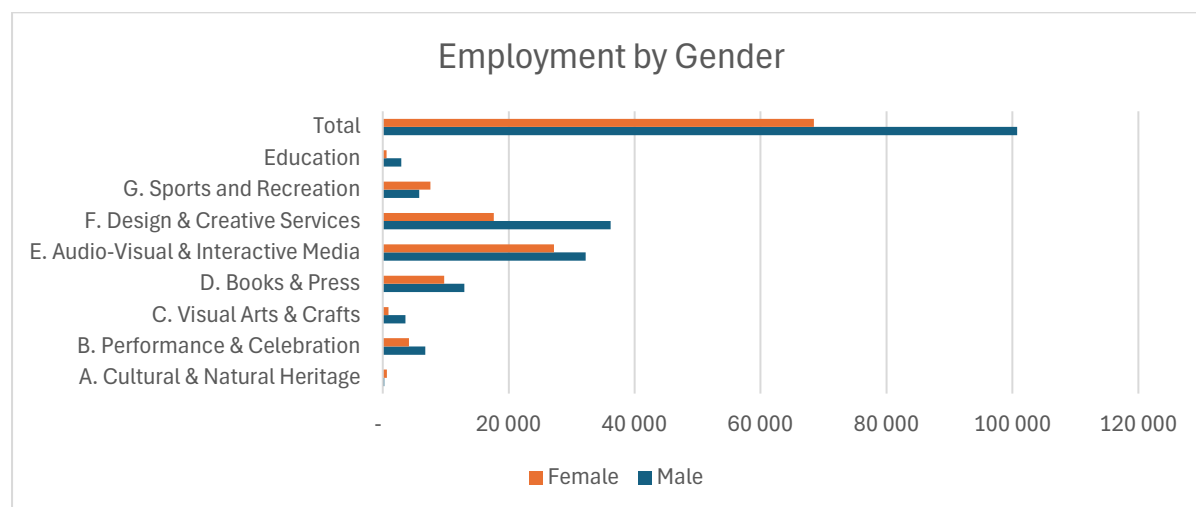


Figure 36: KZN's CCI&S Occupations by Gender

The analysis by age reveals that the 30-34 age category had a greater proportion of cultural and sports occupations. In KZN, 41% of cultural and sports occupations were occupied by the youth (15-34 years), which is higher than the national average of 38%.

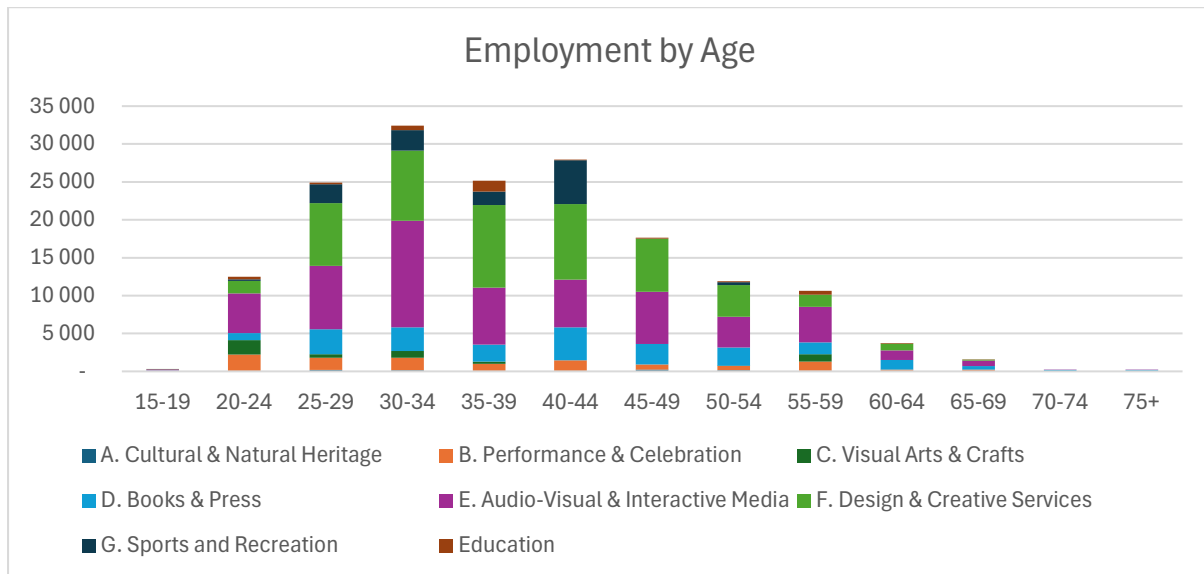


Figure 37: KZN's CCI&S Occupations by Age

With regards to employment by education, 26% of cultural and sports occupations in KZN had tertiary education, which is higher than the national average of 20%. A significant number (43%) had secondary education completed while 26% had not completed their secondary education, compared to the national average of 31%. Refer to [Appendix 1](#) for a breakdown of employment by education by domain.

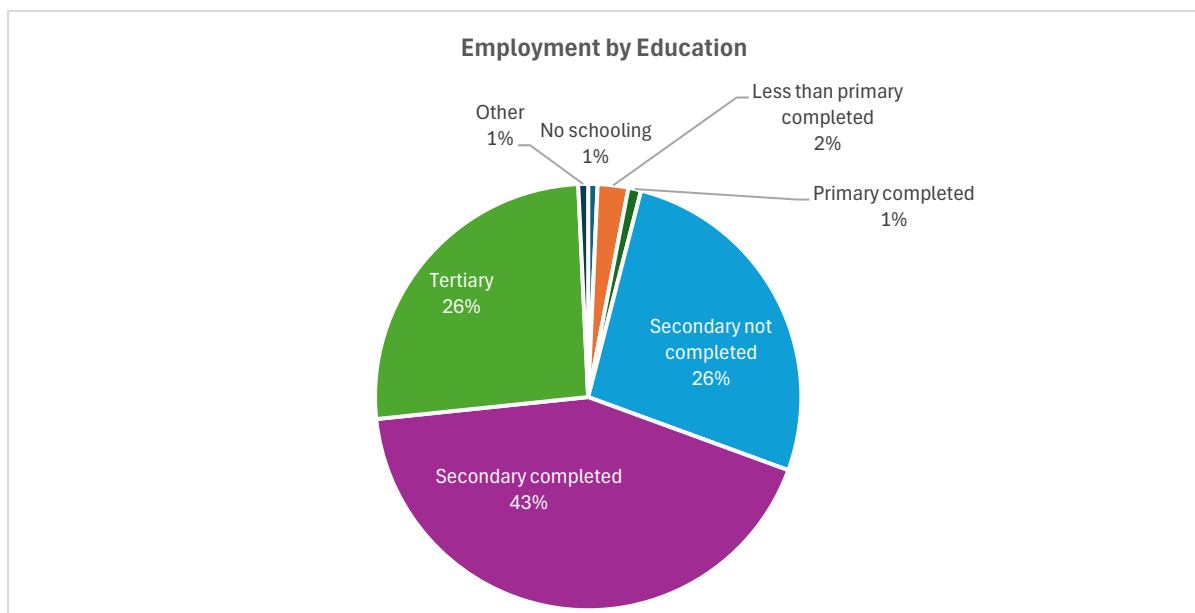


Figure 38: KZN's CCI&S Occupations by Education

4.4.2.3. Contribution to Trade

In 2021, KZN had cultural exports of R1.3³⁸ billion, up from R1.11³⁹ billion in 2020. This makes KZN the third largest exporter of CCI&S nationally, after the Western Cape and Gauteng. The 2021 exports also surpassed the pre-covid 19 levels, which bodes well for KZN and translates into increased revenue for creatives. The growth in cultural exports was mainly driven by Cultural and Natural Heritage and the Visual Arts and Crafts domains.

As a share of total exports in the KZN, the CCI&S share was 0,88% in 2021, up from 0.82% in 2020. The exports of CCI&S by domain are presented in the table below.

Table 12: KZN exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	720.1	694.5	824.9	619.93
Performance and Celebration	21	8.6	7.3	13.64
Visual Arts and Crafts	152.9	145.9	178.4	267.28
Books and Press	89.3	82.1	99.5	194.18
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	-	0.1	-	-
Sports and Recreation	-	-	-	222.08
CCI&S Exports	983	931	1,110	1,317.11
Total Exports	150,596	145,926	135,936	149,442
CCI&S Share of Exports	0.65%	0.64%	0.82%	0.88%

Source: Quantec, SARS

The CCI&S imports in KZN increased from R831⁴⁰ million in 2020 to R1.6⁴¹ billion in 2021. The CCI&S share of imports in KZN has increased from 0.68% in 2020 to 1.09% in 2021. Main imports in KZN are in the Visual Arts and Crafts and Sports and Recreation domain.

Table 13: KZN imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	118.8	77.2	52	67.9
Performance and Celebration	65.7	72	51	66.1
Visual Arts and Crafts	708.2	720.7	677.8	739.5
Books and Press	70.1	143.8	50.2	139.7
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0.1	0	0.2	-
Sports and Recreation				608.16
CCI&S Imports	963	1013.7	831.2	1,621
Total Imports	128,730	125,899	122,715	148,124
CCI&S Share of Imports	0.75%	0.81%	0.68%	1.09%

Source: Quantec, SARS

The CCI&S Balance of Trade in KZN has been sporadic over the period 2018 to 2021. In 2020, it reached a high positive balance of R278 million, which deteriorated to negative R304 million in 2021, mainly due to high imports of sporting goods.

³⁸ Includes exports of sporting goods in 2021

³⁹ Excludes exports of sporting goods in 2021

⁴⁰ Excludes imports of sporting goods in 2021

⁴¹ Includes imports of sporting goods in 2021

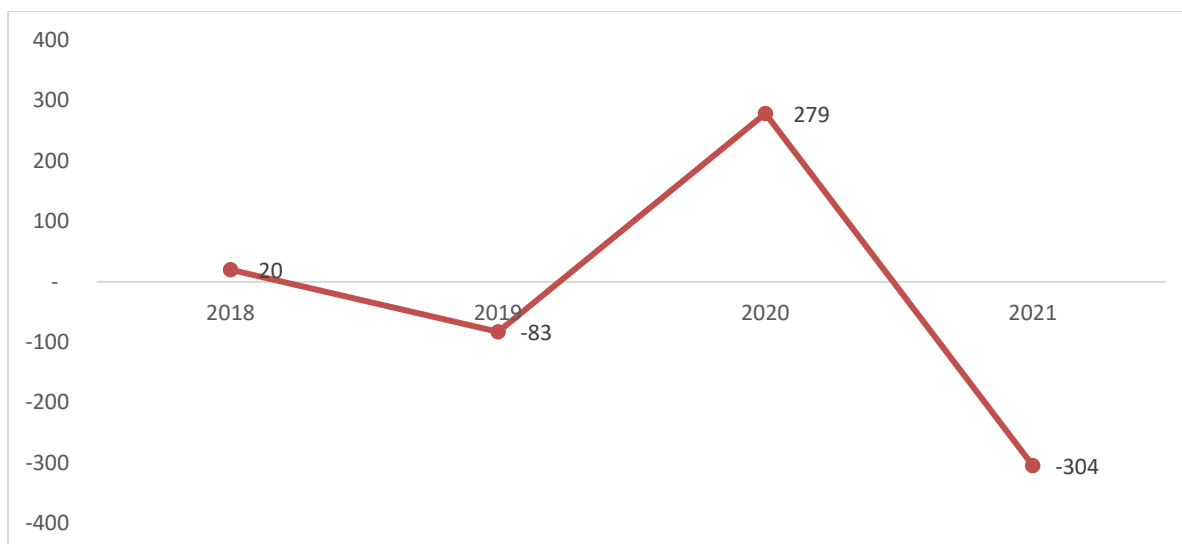


Figure 39: KZN CCI&S Balance of Trade

4.4.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in KZN economy increased total government revenue by an estimated R17.1 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain contributes almost 50% of the tax revenue generated by CCI&S in KZN. This is consistent with the contribution to GDP and cultural occupations.

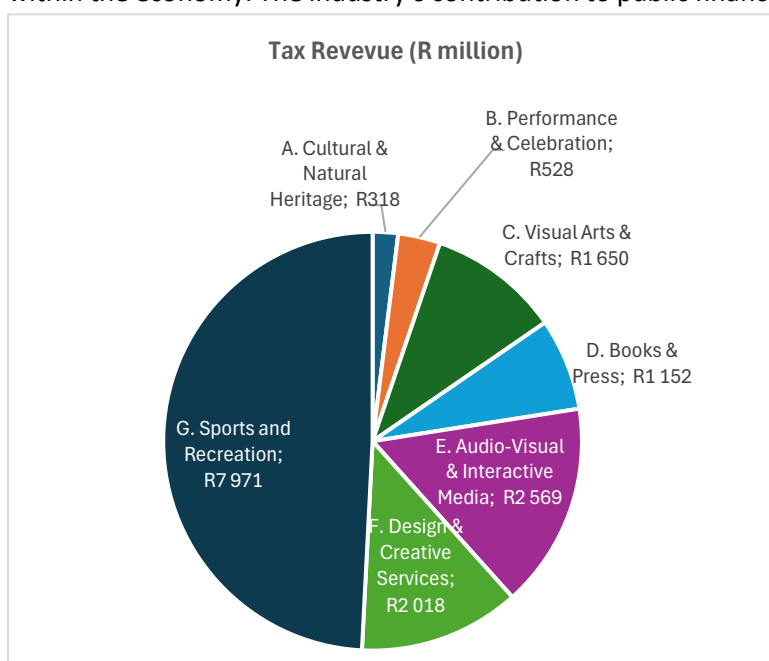


Figure 40: KwaZulu Natal CCI&S Tax Revenue Contribution by Domain

4.4.2.5. Contribution to Poverty Reduction

The CCI&S contributes towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in KZN was nearly R35.7 billion in 2021, an estimated R8.8 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

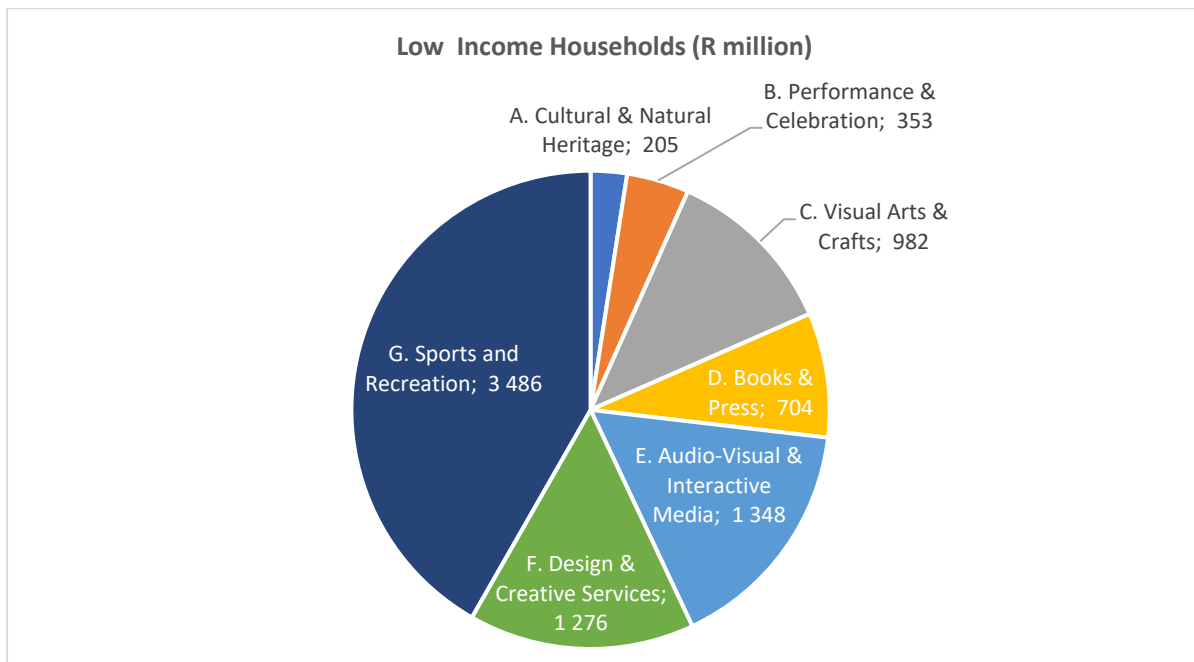


Figure 41: KwaZulu Natal CCI&S Domain Contribution to Low Income Household

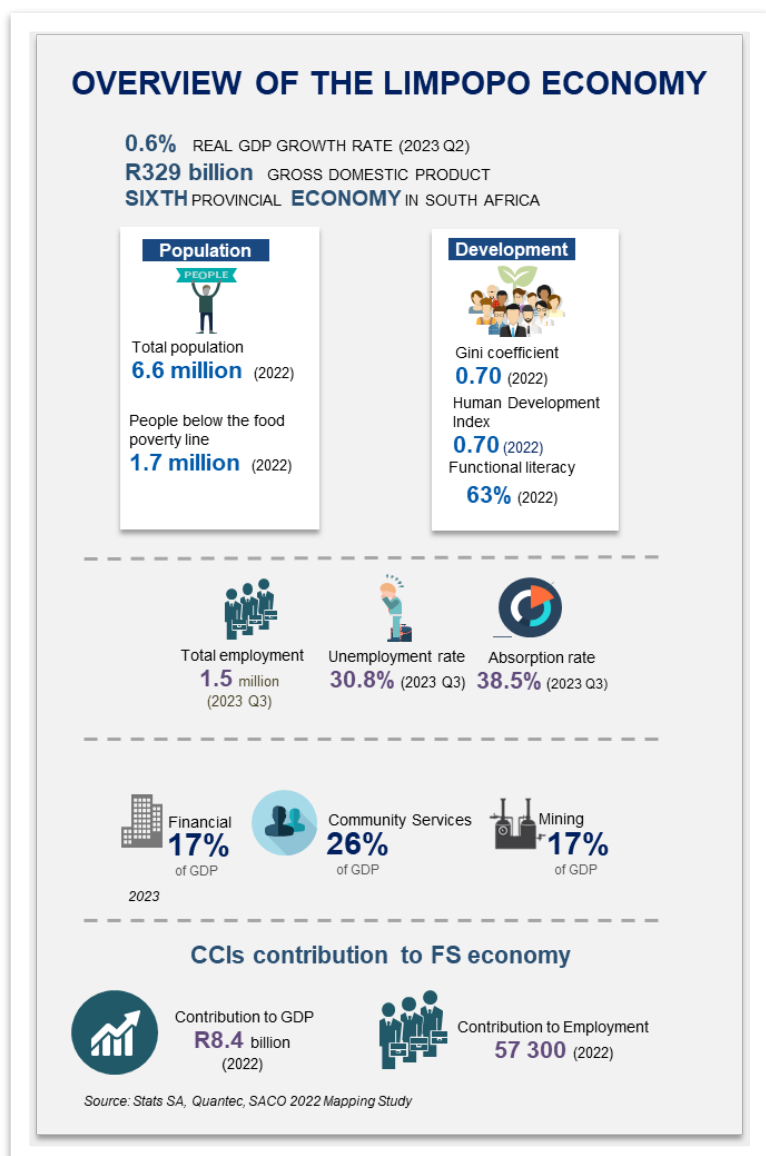
4.5. Limpopo

4.5.1. Limpopo's economy in context

Limpopo province had a real GDP q-o-q growth rate of 0.6% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period expanded by 0.6%. Limpopo has had an annual average growth rate of 2.9% between 1996 and 2015. Limpopo had the third highest average annual growth after Western Cape (3.2%) and Gauteng (3.1%).

The province has the sixth largest provincial economy in South Africa, with a real GDP of R329 billion in 2022. During this period, the province generated 7% of South Africa's GDP. The main economic sectors contributing to the province's economic growth in 2022 were the Community Services (26%), Financial Services (17%) and Mining (17%).

Limpopo had a moderately diversified economy as indicated by the Tress Index score of 43.8 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁴² An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Limpopo ranked fifth amongst the nine provinces, below diversified economies such as Mpumalanga (32.3).



Limpopo had an unemployment rate of 30.8%, which was lower than the national average of 31.9% recorded in the third quarter of 2023.⁴³ The absorption rate, which is the proportion of the working-age population employed, was 38.5% in the province in the third quarter of 2023. This is lower than

⁴² Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

⁴³ StatsSA Statistical release P0211 Quarterly Labour Force Survey Quarter 4:2023

the South African absorption rate of 41%. Total employment in the province was 1.5 million in this quarter.

In addition to high unemployment, income inequality burdens Limpopo province. In 2022, Limpopo's Gini-coefficient⁴⁴ was 0.70, which is the eighth highest of the nine provinces.⁴⁵ The United Nations Development Programme's Human Development Index (HDI)⁴⁶ of 0.737 in 2020 indicated that human development was in the medium range of 0.7 to 0.799.⁴⁷ An HDI score of 1 indicates a high level of economic development, 0 a very low level. Limpopo's HDI was higher than the national HDI of 0.68. A further economic and social challenge is the high level of poverty facing Limpopo residents. In 2022, as estimated 1.7 million (28%) individuals lived below the food poverty line of R622, a smaller share than the national average of 35%.⁴⁸

Limpopo has a vibrant and growing creative industry and plays a critical role on creating jobs and reducing poverty. The creative industry contributed R8.4 billion to GDP in 2022 and 57 300 jobs.

4.5.2. Limpopo CCI&S Contribution

The figure below summarises the contribution of the CCI&S to the economies of Limpopo and South Africa. These contributions are analysed in the next sections.

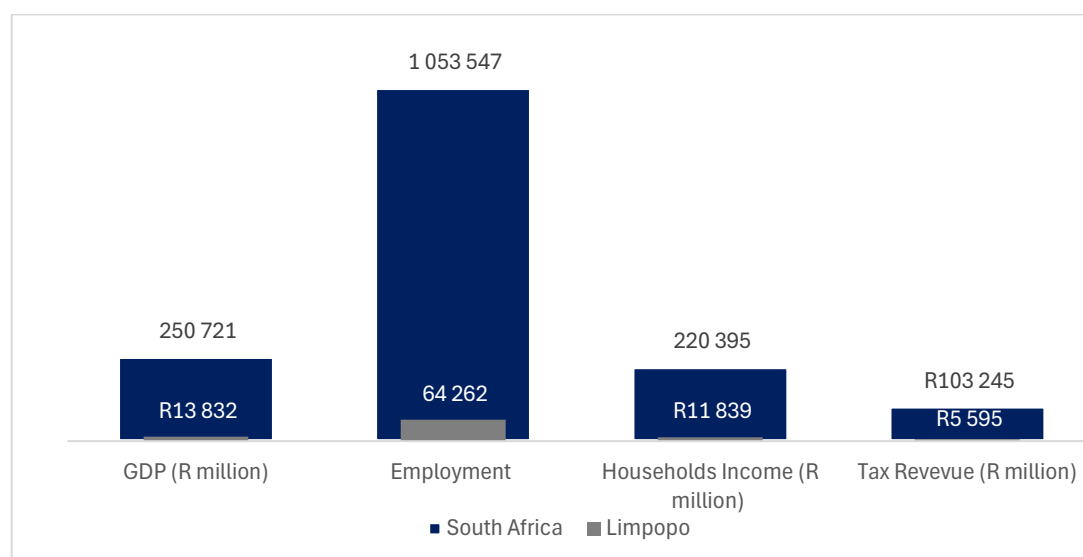


Figure 42: Limpopo CCI&S economic contribution

⁴⁴ The Gini-coefficient measures income inequality. This measure ranges from zero to one, zero indicating perfect equality and one indicating a situation where one household all earns all the income.

⁴⁵ Quantec, 2022

⁴⁶ The HDI is "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living."

⁴⁷ UNDP Human Development Report 2021/2022

⁴⁸ Quantec, 2022

4.5.2.1. Contribution to GDP

In 2021, Limpopo province had a GDP of R489 billion (current prices), which translates to 7.9% to South

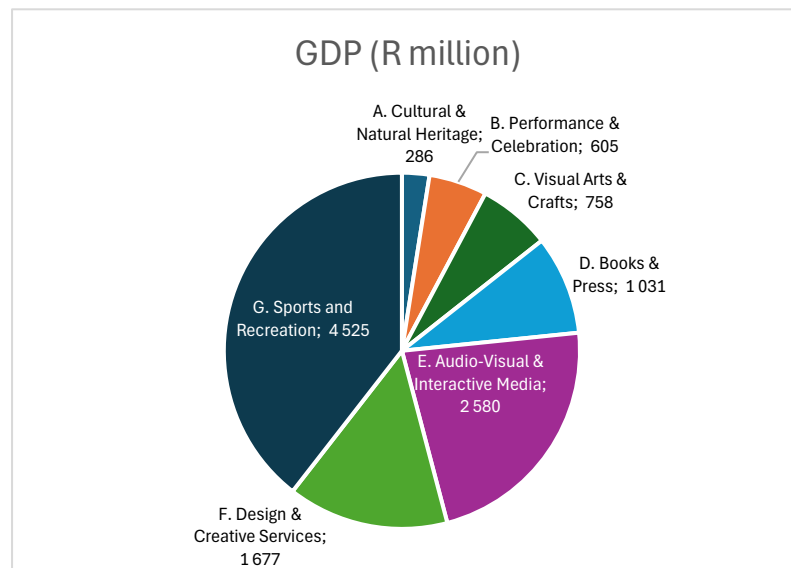


Figure 43: Limpopo CCI&S GDP Contribution by Domain

Africa's GDP. The assessment shows that the CCI&S contribution to the Limpopo's GDP was R13.8 billion (current prices), which represents 2.8% of the province's total GDP. In 2021, Limpopo contributed 5% to South Africa's CCI&S GDP. The figure below represents the CCI&S domain in Limpopo. The Sports and Recreation, Audio-Visual & Interactive Media and Design and creative services domains contributed 39%, 23% and 15% respectively towards the CCI&S GDP in Limpopo.

4.5.2.2. Contribution to Cultural and Sports Employment

In 2021, 968 583 people were employed in Limpopo (6.7% of national employment). During the same period, the cultural and sports industries in Limpopo employed 64,262 ⁴⁹ individuals, which translates to 6.1% of cultural and sports occupations nationally. The cultural occupations in the Limpopo make 6.3% of the province's total employment.

Of the 64,262 jobs, 21,916 were creative occupations in the creative industries and creative occupations in other industries, while 42,346 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in Limpopo.

Table 14: Limpopo Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	1,350	2%	5,839	23%
B. Performance & Celebration	2,683	4%	62,582	4%
C. Visual Arts & Crafts	197	0%	27,792	1%
D. Books & Press	11,110	17%	148,069	8%
E. Audio-Visual & Interactive Media	26,632	41%	394,952	7%
F. Design & Creative Services	18,541	29%	319,931	6%
G. Sports and Recreation	2,713	4%	61,377	4%
Education	1,035	2%	33,005	3%
Total	64,262	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that a large number of jobs are in the Audio-Visual & Interactive Media and Design & Creative Services and Book and Press domains, which account for 41% and 29% and 17% of all cultural and sports occupations in the province.

⁴⁹ StatsSA LMDS

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 64,262 cultural and sports occupations, 58 390 (91%) were occupied by Blacks/Africans, followed by the Indians/Asians and Whites at 6% and 2.4% respectively. There were no Colours occupations in Limpopo recorded. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

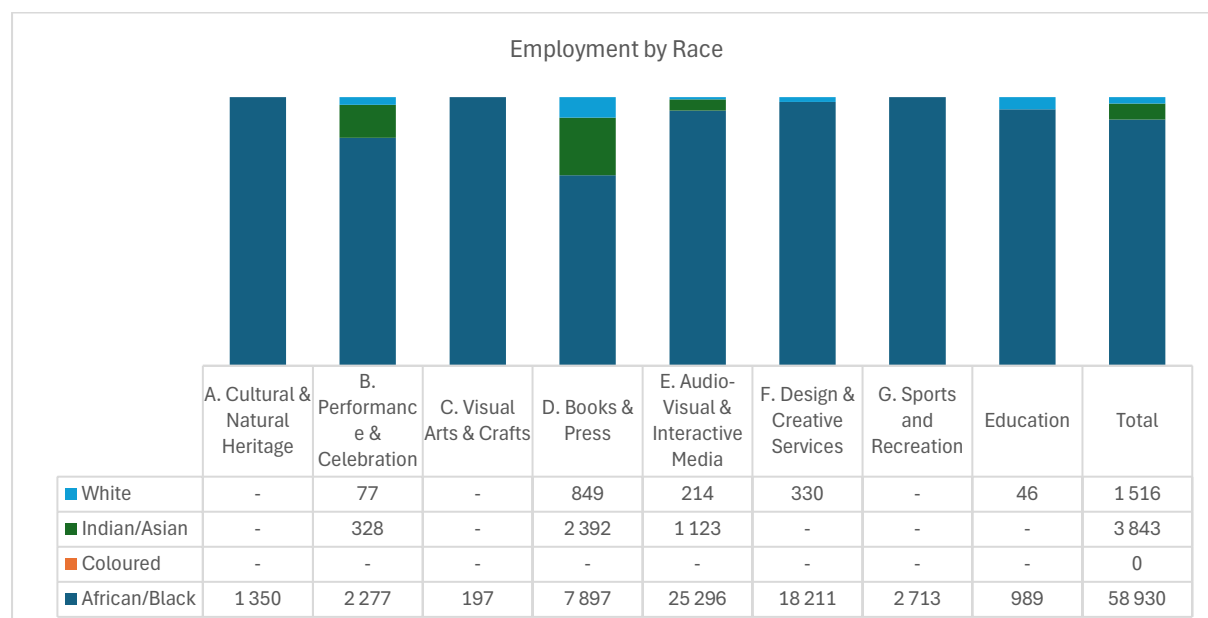


Figure 44: Limpopo's CCI&S Occupations by Race

Of the 64,262 cultural and sports occupations, 33 704 (62%) were occupied by males. The Design and Creative Services and Book and Press domains employed more males and the Audio-Visual and Interactive Media employment more females. The Sports and Recreation domain had no record of male employment.

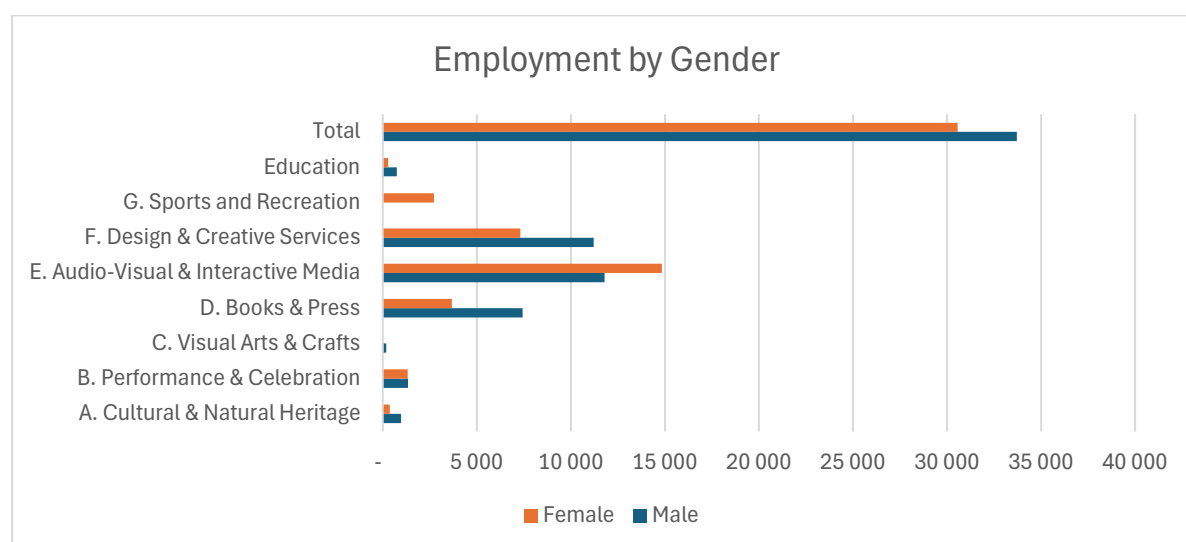


Figure 45: Limpopo's CCI&S Occupations by Gender

The analysis by age indicates that the 30-34 age category had a greater proportion of cultural occupations. In Limpopo, 38% of cultural occupations were occupied by youth (15-34 years), which is in line with the national average of 38%.

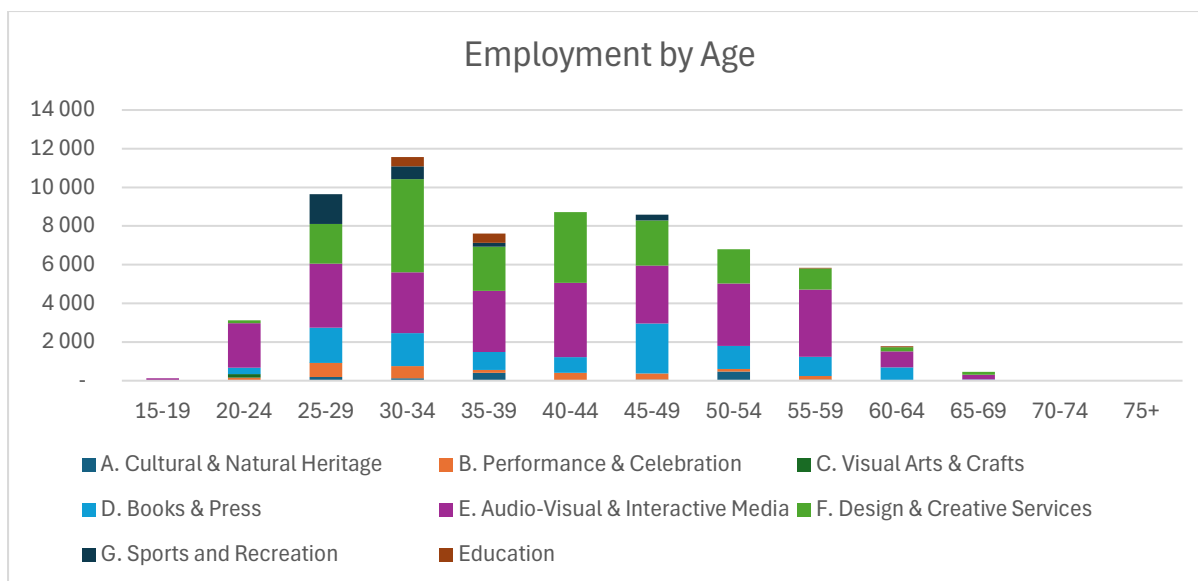


Figure 46: Limpopo's CCI&S Occupations by Age

With regards to employment by education, 19% of cultural and sports occupations in Limpopo had tertiary education, marginally lower than the national average of 20%. An additional 31% had secondary education completed while a significant number (40%) had not completed their secondary education, compared to the national average of 31%. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

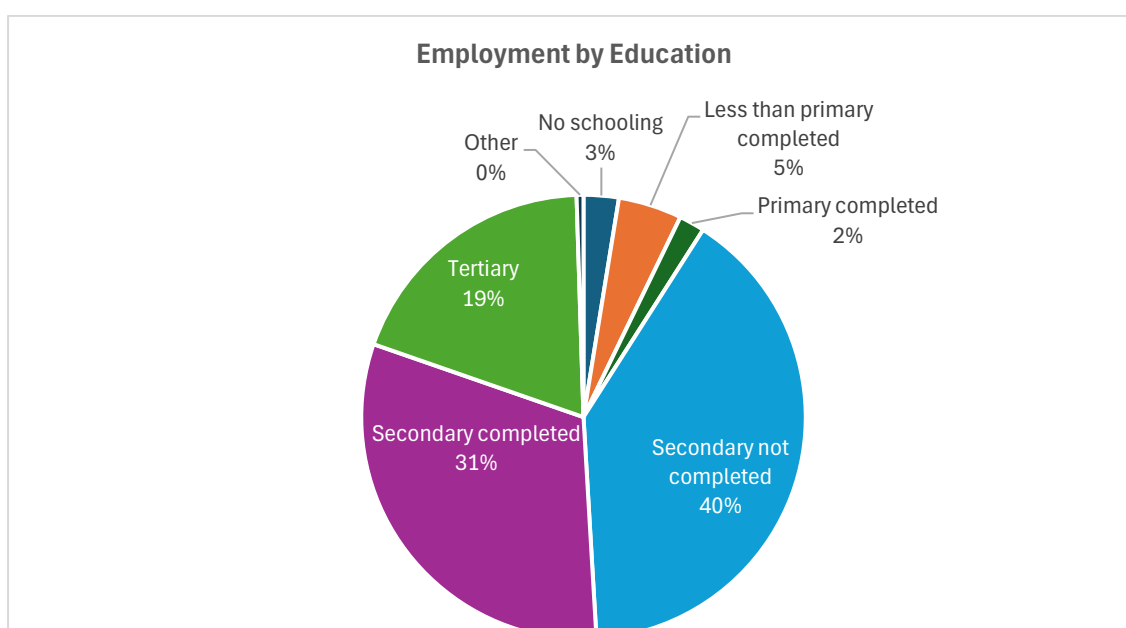


Figure 47: Limpopo's CCI&S Occupations by Education

4.5.2.3. Contribution to Trade

In 2021, Limpopo had cultural and sports exports of R66.7⁵⁰ million, up from R62⁵¹ million in 2020. This makes Limpopo the sixth largest exporter of CCI&S nationally. The 2021 exports were also in line

⁵⁰ Includes exports of sporting goods in 2021

⁵¹ Excludes exports of sporting goods in 2020

with the 2019 exports, indicating a recovery of CCI&S exports in Limpopo. The exports in Limpopo are mainly in the Cultural and Natural Heritage domain.

As a share of total exports in Limpopo, the CCI&S share was 0,06% in 2021, down from 0.1% in 2020. The drop in the share of exports is a result of a huge increase in total exports from Limpopo (69%), relative to the increase in CCI&S exports. The table below highlights the exports of CCI&S by domain in Limpopo.

Table 15: Limpopo exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	51.5	58.2	59.50	59.48
Performance and Celebration	2.1	2.4	0.3	0.54
Visual Arts and Crafts	2.8	2.3	0.8	2.95
Books and Press	1.7	2.2	1.4	1.83
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	-	-	-	-
Sports and Recreation	-	-	-	1.91
CCI&S Exports	58	65.1	62	66.72
Total Exports	40,891	45,317	62,006	105,017
CCI&S Share of Exports	0.14%	0.14%	0.10%	0.06%

Source: Quantec, SARS

The imports in Limpopo were R25.3 million in 2021, up from R9 million in 2020. The CCI&S accounts for 0.39% of total exports in Limpopo in 2021. Limpopo imports in the CCI&S are mainly in the Sports and Recreation, Cultural and Natural Heritage and Books and Press domains.

Table 16: Limpopo imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	2	1.9	3	3.82
Performance and Celebration	0	0.2	3.4	1.46
Visual Arts and Crafts	1.1	2.2	0.6	1.07
Books and Press	0.9	0.8	1.7	2.44
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	16.47
CCI&S Imports	4.00	5.10	9.00	25.26
Total Imports	3,151	2,786	5,123	6,434
CCI&S Share of Imports	0.13%	0.18%	0.18%	0.39%

Source: Quantec, SARS

Limpopo recorded a positive CCI&S Balance of Trade over the period 2018 to 2021. In 2019, the Balance of Trade reached a high of R60 million but slowed down to R53 million in 2020 and R41 million in 2021.

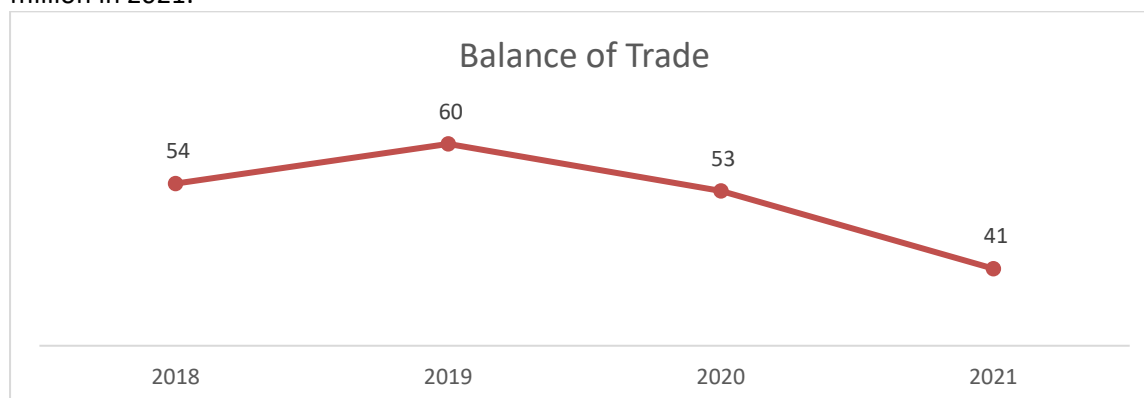


Figure 48: Limpopo CCI&S Balance of Trade

4.5.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through

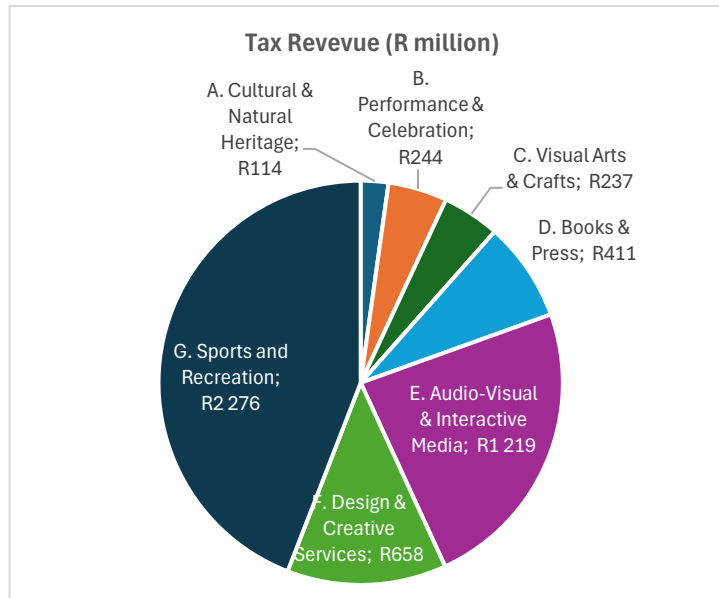


Figure 49: Limpopo CCI&S Tax Revenue Contribution by Domain

a wide range of taxes. During 2021, the CCI&S in Limpopo economy increased total government revenue by an estimated R5.6 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain contributes almost 44% of the tax revenue generated by CCI&S in Limpopo, followed by the Audio Visual & Interactive Media (24%) domain.

4.5.2.5. Contribution to Poverty Reduction

The CCI&S contribute towards poverty alleviation through its impact on the economic viability of low-

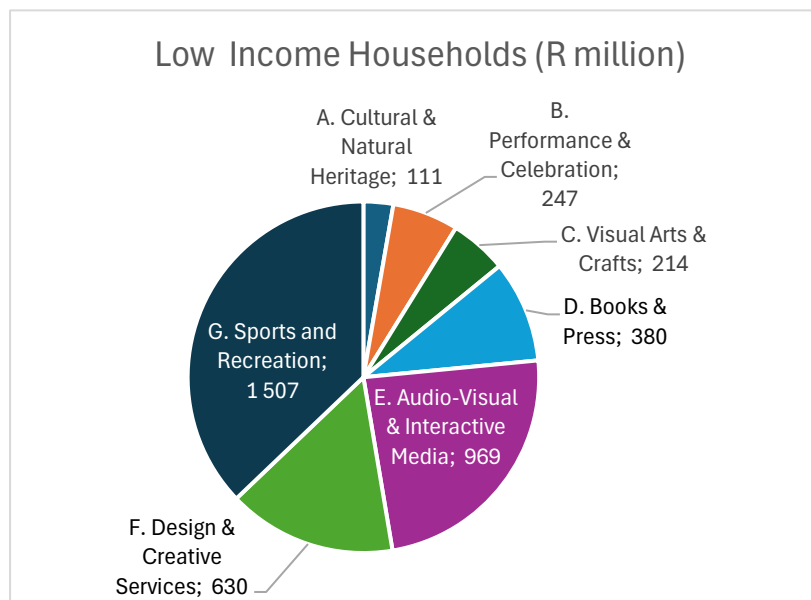


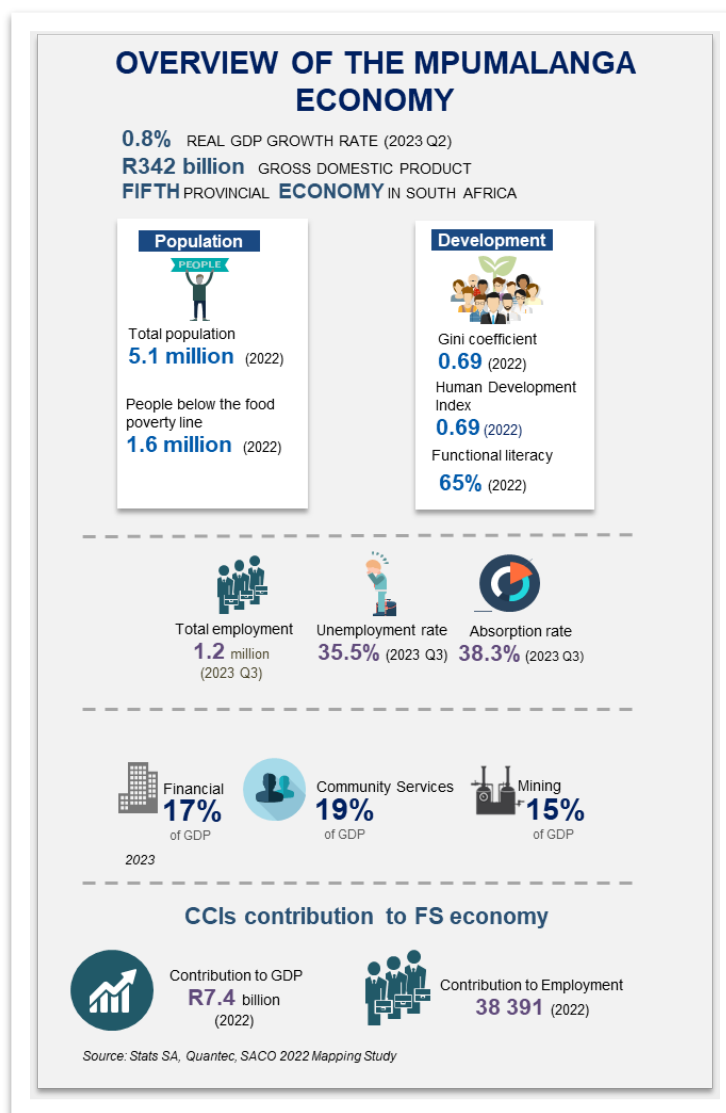
Figure 50: Limpopo CCI&S Domain Contribution to Low Income Household

income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in Limpopo was nearly R11.8 billion in 2021, an estimated R4.4 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

4.6. Mpumalanga

4.6.1. Mpumalanga's economy in context

With a real GDP quarter-to-quarter growth rate of 0.8% in the second quarter of 2023, Mpumalanga's contribution was the highest compared to other provinces. The national quarter-to-quarter GDP in the same period was 0.6%. Mpumalanga's GDP amounted to R342 billion in 2022, which contributed 7% to South Africa's national GDP.



The main economic sectors contributing to economic growth in 2022 include the mining sector (15%), the finance sector (17%) and the community services sector (19%).

Mpumalanga had a well-diversified economy as indicated by the Tress Index score. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁵² An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Gauteng ranked first amongst the nine provinces.

Mpumalanga had an unemployment rate of 35.5%, which was higher than the national average of 31.9% recorded in the third quarter of 2023.⁵³ The absorption rate, which is the proportion of the working-age population employed, was 38.3% in the province in the third quarter of 2023. This is lower than the South African absorption rate of 41%. Total employment in the province was 1.2 million in this quarter.

⁵² Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

⁵³ StatsSA Statistical release P0211 Quarterly Labour Force Survey Quarter 4:2023

In addition to high unemployment, income inequality burdens the province. In 2022, Mpumalanga's Gini-coefficient⁵⁴ was 0.69, which is the fourth highest of the nine provinces.⁵⁵ The United Nations Development Programme's Human Development Index (HDI)⁵⁶ of 0.737 in 2020 indicated that human development was in the medium range of 0.7 to 0.799.⁵⁷ An HDI score of 1 indicates a high level of economic development, 0 a very low level. Mpumalanga's HDI was higher than the national HDI of 0.68. A further economic and social challenge is the high level of poverty facing Mpumalanga residents. In 2022, as estimated 1.6 million (34%) individuals lived below the food poverty line of R607, a smaller share than the national average of 35%.⁵⁸

Mpumalanga has a vibrant and growing creative industry and plays a critical role on creating jobs and reducing poverty. The creative industry contributed R8.4 billion to GDP in 2022 and 57 300 jobs.

4.6.2. Mpumalanga's CCI&S Contribution

The figure below summarises the contribution of the CCI&S to the economies of Mpumalanga and South Africa. These contributions are analysed in the next sections.

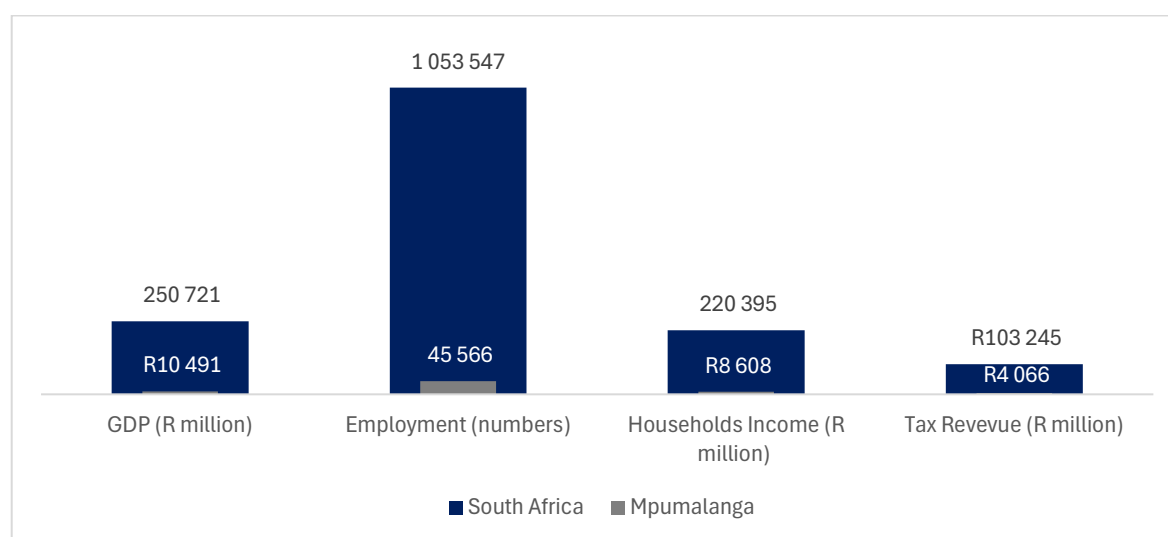


Figure 51: Mpumalanga CCI&S economic contribution

4.6.2.1. Contribution to GDP

In 2021, Mpumalanga province had a GDP of R507 billion (2021 current prices), which translates to 8.2% of South Africa's GDP. The assessment shows that CCI&S contribution to the Mpumalanga's GDP was R10.5 billion (2021 current prices), which represents 2.1% of the province's total GDP and 4.2% of South Africa's CCI&S GDP. The figure below represents the CCI&S domain in Mpumalanga. The Sports and Recreation, Audio-Visual & Interactive Media and Design and creative services domains are the largest contributors to CCI&S GDP in Mpumalanga.

⁵⁴ The Gini-coefficient measures income inequality. This measure ranges from zero to one, zero indicating perfect equality and one indicating a situation where one household all earns all the income.

⁵⁵ Quantec, 2022

⁵⁶ The HDI is "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living."

⁵⁷ UNDP Human Development Report 2021/2022

⁵⁸ Quantec, 2022

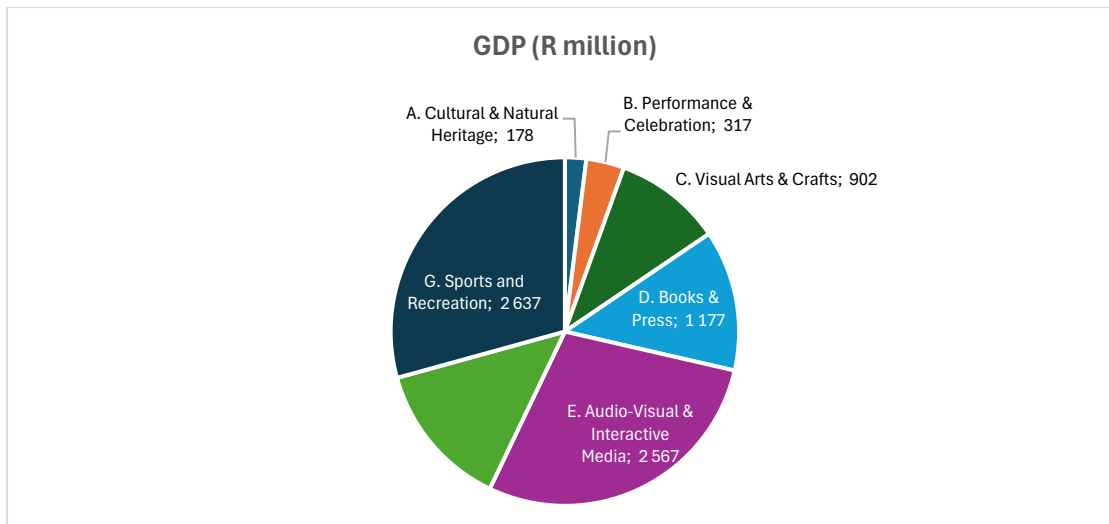


Figure 52: Mpumalanga CCI&S GDP Contribution by Domain

4.6.2.2. Contribution to Cultural and Sports Employment

In 2021, 1 039 325 people were employed in Mpumalanga (7.2% of national employment). During the same period, the cultural and sports industries in Mpumalanga employed 63,039⁵⁹ individuals, which translates to 6% of cultural and sports occupations nationally. The cultural occupations in the Mpumalanga make up 6.1% of the province's total employment.

Of the 63,039 jobs, 21,499 were creative occupations in the creative industries and creative occupations in other industries, while 41,540 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in Mpumalanga.

Table 17: Mpumalanga's Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % contribution
A. Cultural & Natural Heritage	122	0%	5,839	2%
B. Performance & Celebration	3,809	6%	62,582	6%
C. Visual Arts & Crafts	960	2%	27,792	3%
D. Books & Press	8,078	13%	148,069	5%
E. Audio-Visual & Interactive Media	24,929	40%	394,952	6%
F. Design & Creative Services	20,036	32%	319,931	6%
G. Sports and Recreation	1,685	3%	61,377	3%
Education	3,420	5%	33,005	10%
Total	63,039	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that most jobs were in the Audio-Visual & Interactive Media (40%), Design & Creative Services (32%) and Book and Press (13%) domains, similar to the national patterns.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

⁵⁹ StatsSA LMDS

Of the 63,039 cultural and sports occupations, 56,019 (89%) were occupied by Blacks/Africans, followed by Whites at 6 149 (9.8%). Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

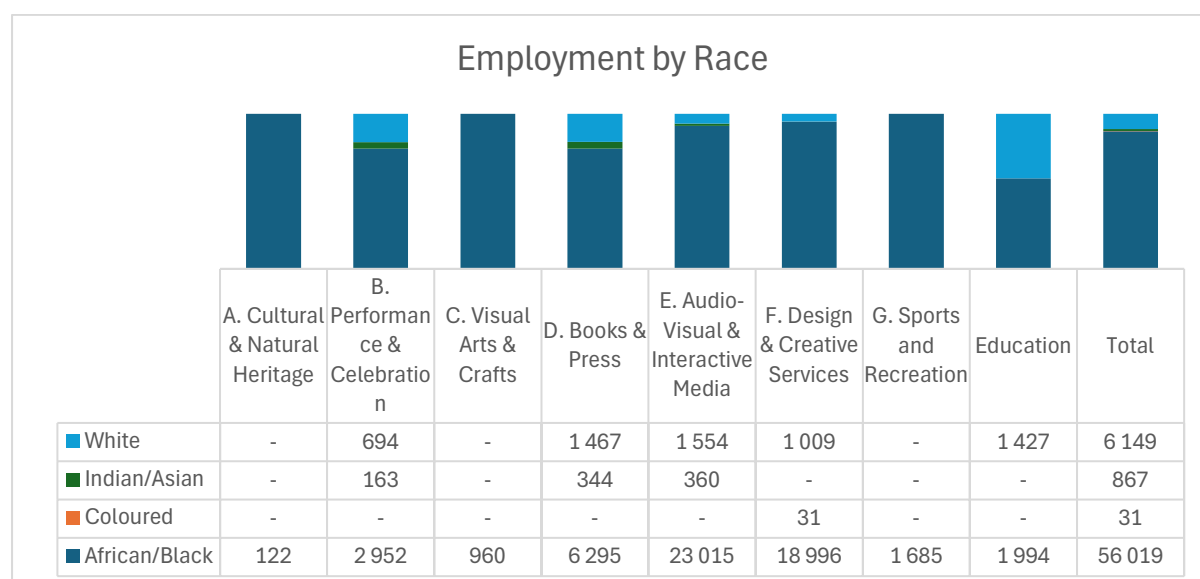


Figure 53: Mpumalanga's CCI&S Occupations by Race

The distribution of jobs by gender was almost equal. Of the 63,039 cultural and sports occupations, 31,725 (50.3%) were occupied by females, compared to the national average of 55% males and 45% females. However, the Audio Visual& Interactive Media and Books and Press domains employed more females while the Design and Creative Services domain employed more males.

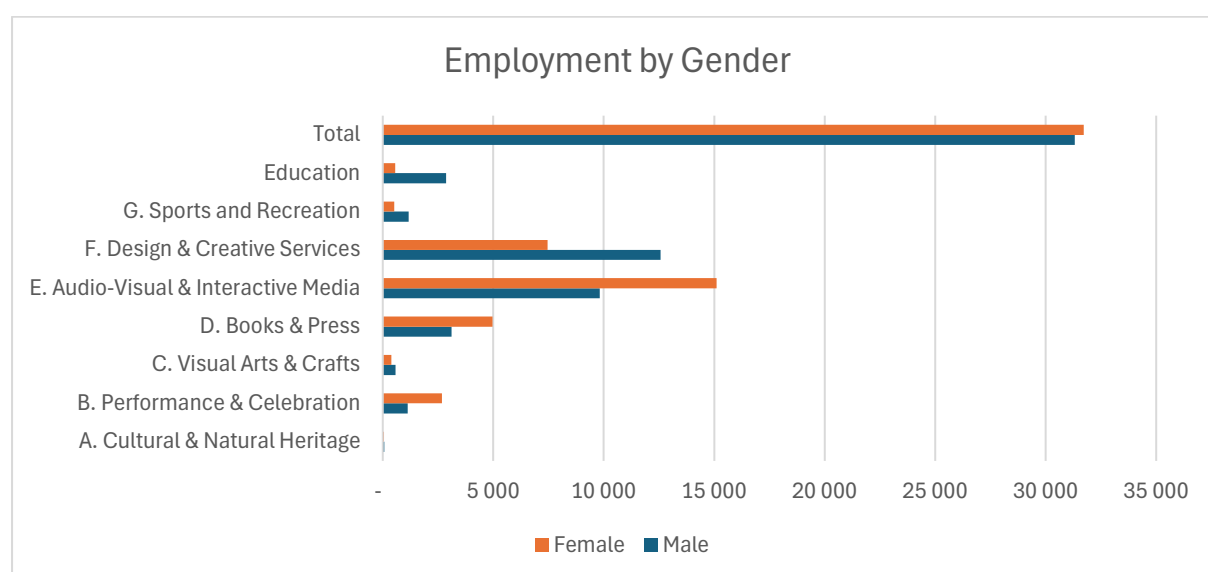


Figure 54: Mpumalanga's CCI&S Occupations by Gender

The analysis by age indicates that the 40-44 age category had a greater proportion of cultural occupations (16%). In Mpumalanga, 42% of cultural occupations were occupied by youth (15-34 years), which is higher than the national average of 38%.

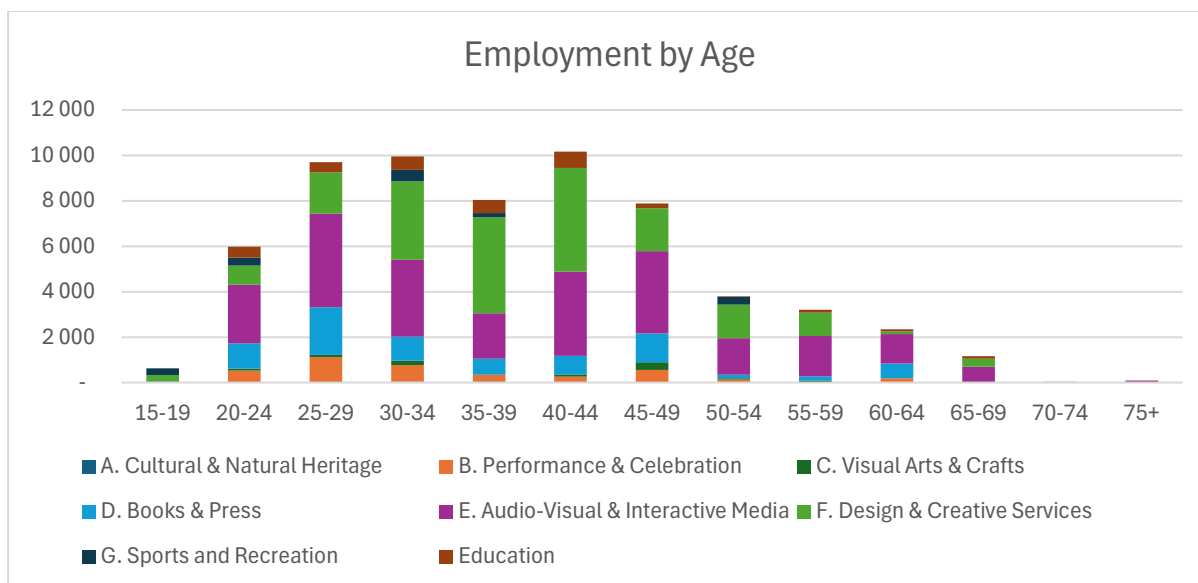


Figure 55: Mpumalanga's CCI&S Occupations by Age

With regards to employment by education, only 12% of cultural and sports occupations in Mpumalanga had tertiary education, significantly lower than the national average of 20%. A significant number (41%) had secondary education completed while 34% had not completed their secondary education. Significant low levels of education can be a constraint for the sector, from a growth and developmental perspective. Provinces with relatively higher levels of education (Gauteng and Western Cape) in the industry have seen better growth prospects. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

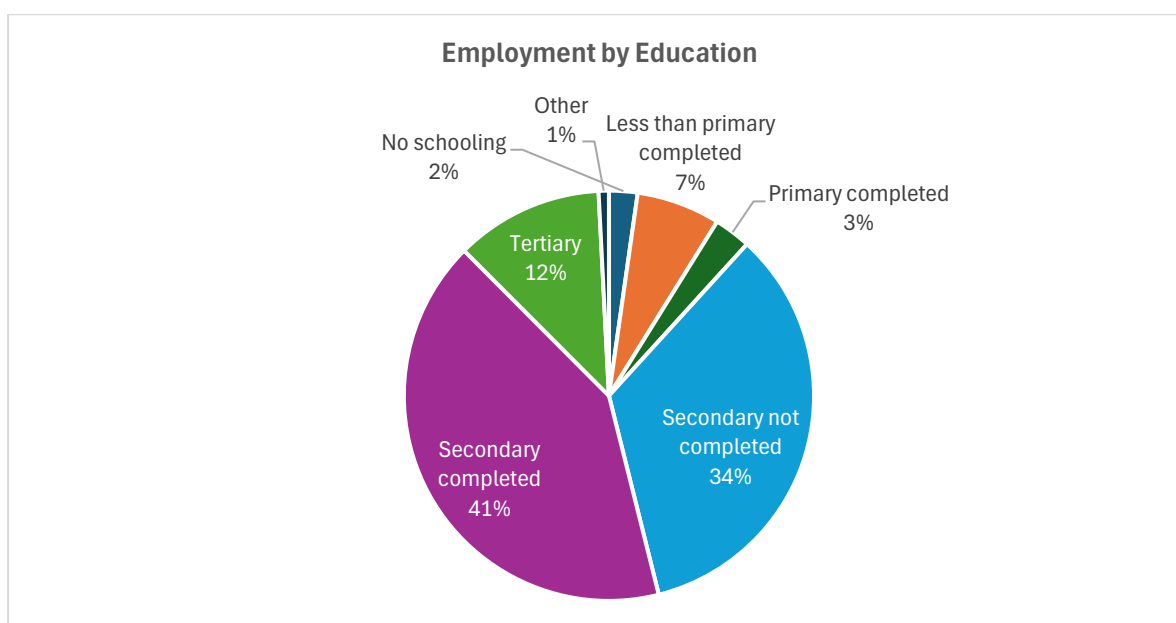


Figure 56: Mpumalanga's CCI&S Occupations by Education

4.6.2.3. Contribution to Trade

Mpumalanga had cultural exports of R91.1⁶⁰ million in 2021, up from R69⁶¹ million in 2020. This makes Mpumalanga the fifth largest exporter of CCI&S nationally. The key exports from Mpumalanga are in

⁶⁰ Includes exports of sporting goods in 2021

⁶¹ Excludes exports of sporting goods in 2020

the Culture and Natural Heritage and Visual Arts and Crafts. The exports of Books and Press domain has seen an increase of 56% between 2018 and 2021.

As a share of total exports in Mpumalanga, the CCI&S share was 0,12% in 2021. The table below highlights the exports of CCI&S by domain in Mpumalanga.

Table 18: Mpumalanga exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	26	37	28	33.73
Performance and Celebration	3	2	3	3.36
Visual Arts and Crafts	17	18	23	28.29
Books and Press	4	6	15	15.18
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	10.52
CCI&S Exports	50	63	69	91.08
Total Exports	29,988	30,499	58,568	79,032
CCI&S Share of Exports	0.17%	0.21%	0.12%	0.12%

Source: Quantec, SARS

The imports in Mpumalanga were R36⁶² million in 2021, a notable increase from R17⁶³ million in 2020. The CCI&S in Mpumalanga accounts for 0.25% of total imports in 2021. Mpumalanga imports in the CCI&S are mainly in the Visual Arts and Crafts and Sports and Heritage domains.

Table 19: Mpumalanga imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	4	4	4	7.62
Performance and Celebration	1	0	0	0.67
Visual Arts and Crafts	8	6	13	13.2
Books and Press	1	1	0	0.93
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	13.42
CCI&S Imports	14	11	17	36
Total Imports	6,782	6,813	11,426	14,593
CCI&S Share of Imports	0.21%	0.16%	0.15%	0.25%

Source: Quantec, SARS

Mpumalanga CCI&S Balance of Trade has been positive over the period 2018 to 2021, and on an upward trajectory over the same period. The graph below illustrates the Balance of Trade movement for cultural and sporting goods.

⁶² Includes imports of sporting goods in 2021

⁶³ Excludes imports of sporting goods in 2020

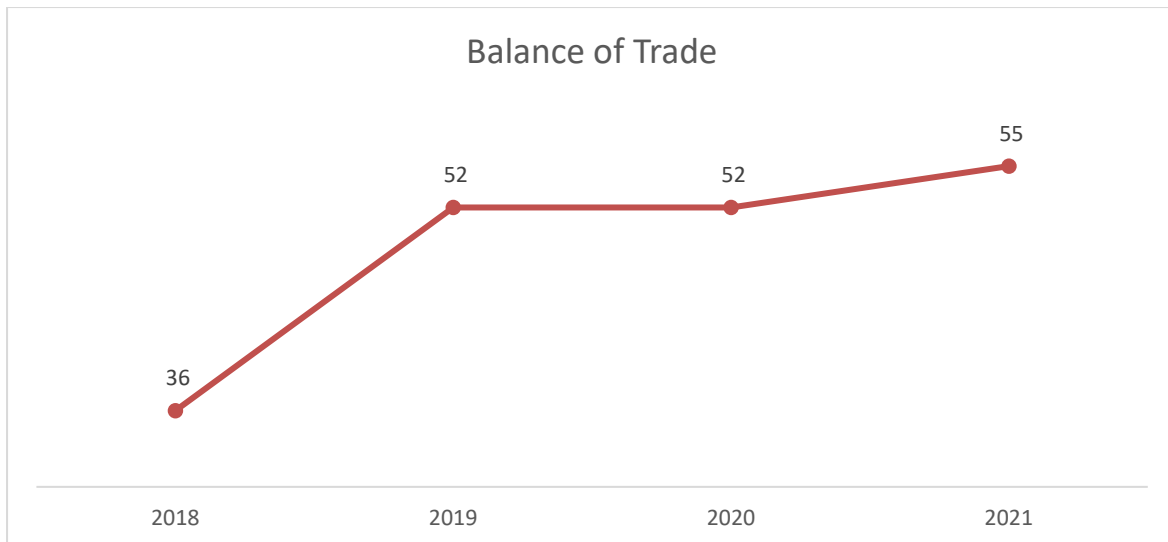


Figure 57: Mpumalanga CCI&S Balance of Trade

4.6.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in Mpumalanga's economy increased total government revenue by an estimated R4.1 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain contributes almost 35% of the tax revenue generated by CCI&S in Mpumalanga, followed by the Audio Visual & Interactive Media (27%) domain.

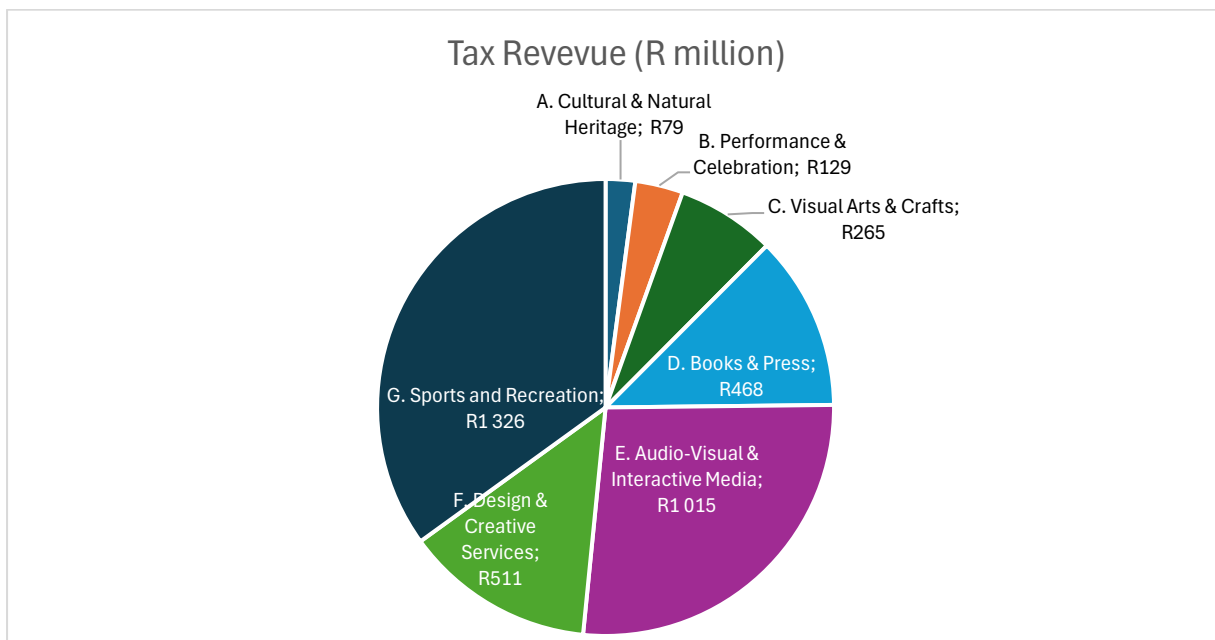


Figure 58: Mpumalanga CCI&S Tax Revenue Contribution by Domain

4.6.2.5. Contribution to Poverty Reduction

The CCI&S contribute towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in Mpumalanga was nearly R8.6 billion in 2021, an estimated R2 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

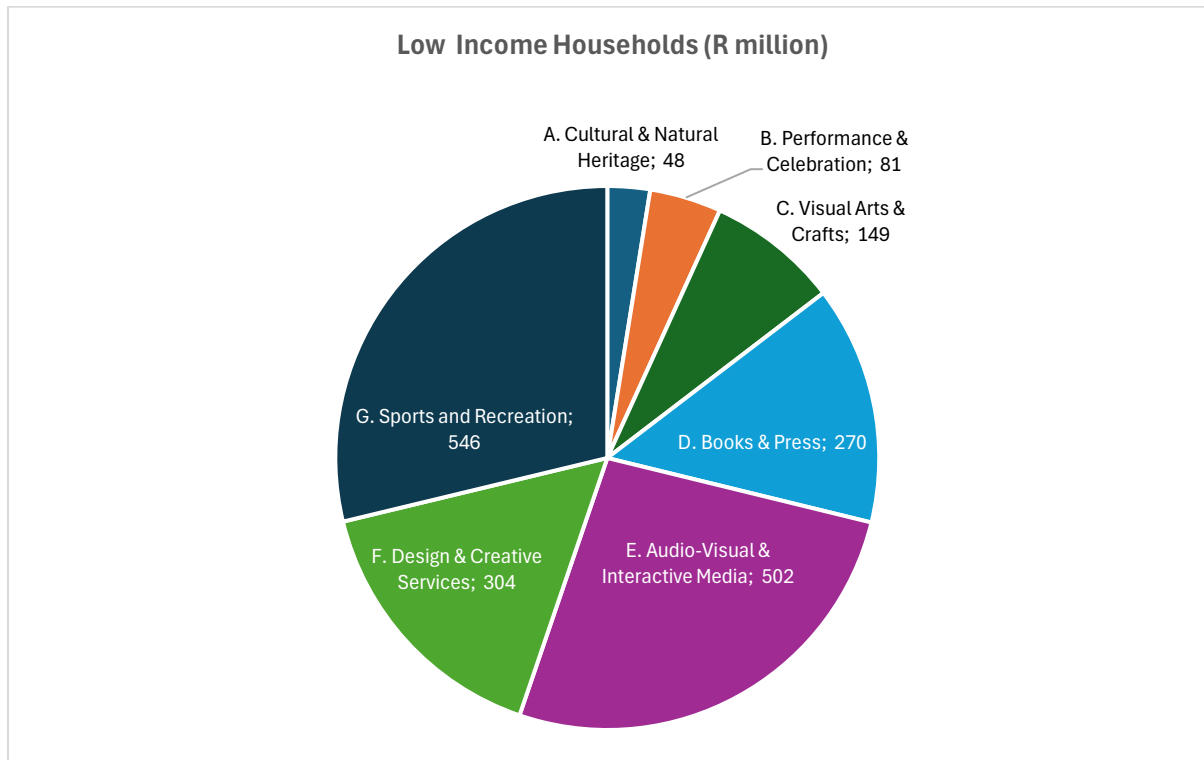


Figure 59: Mpumalanga CCI&S Domain Contribution to Low Income Household

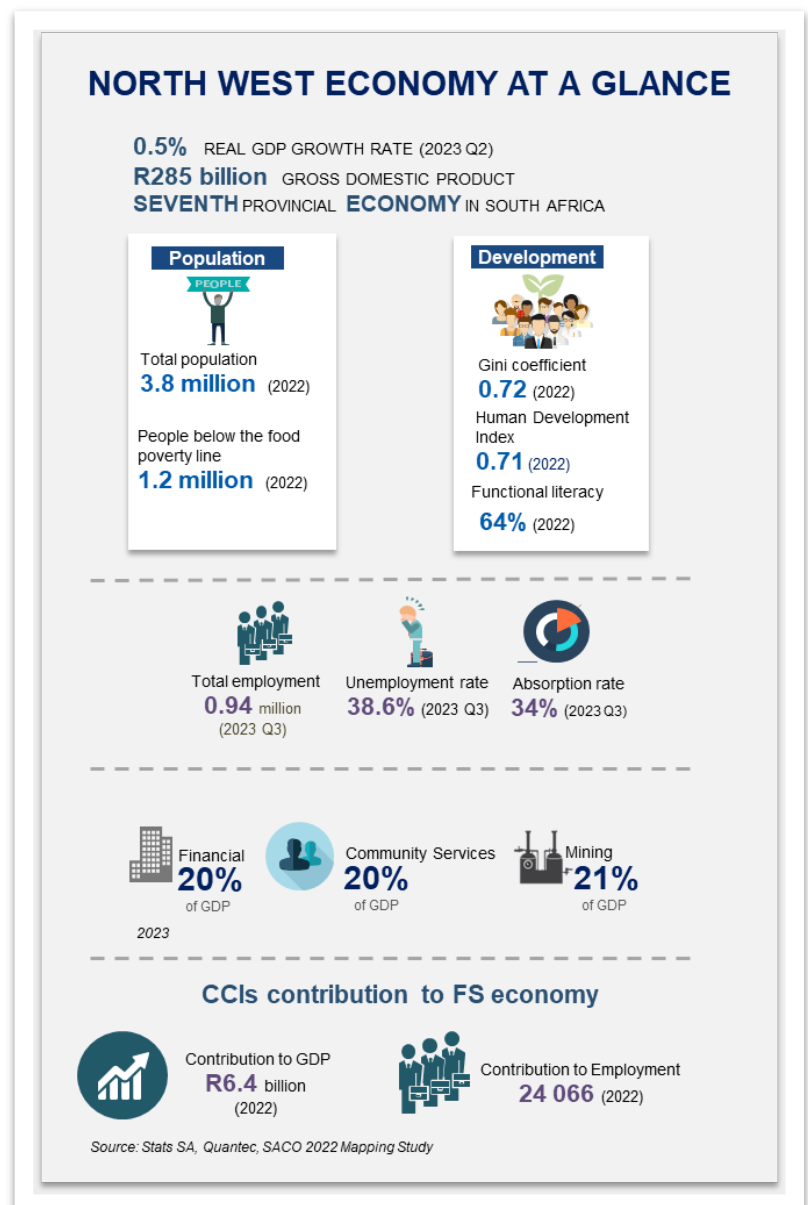
4.7. North-West

4.7.1. North-West economy in context

North-West had a real GDP quarter-to-quarter growth rate of 0.5% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period was 0.6%. In 2022, the province was the seventh largest provincial economy in South Africa, with a nominal GDP of R285 billion.

The main economic sectors contributing to North-West economic growth in 2022 were mining (21%), the finance and business services sector (20%), and the community services sector (12%).

North-West had a moderately diversified economy as indicated by the Tress Index score of 41.5 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁶⁴ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. North West ranked fourth amongst the nine provinces, below diversified economies such as Mpumalanga (32.3) and Northern Cape (34.7).



⁶⁴ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

4.7.2. North West's CCI&S Contribution

The figure below summarises the contribution of the CCI&S to the economies of North-West and South Africa. These contributions are analysed in the next sections.

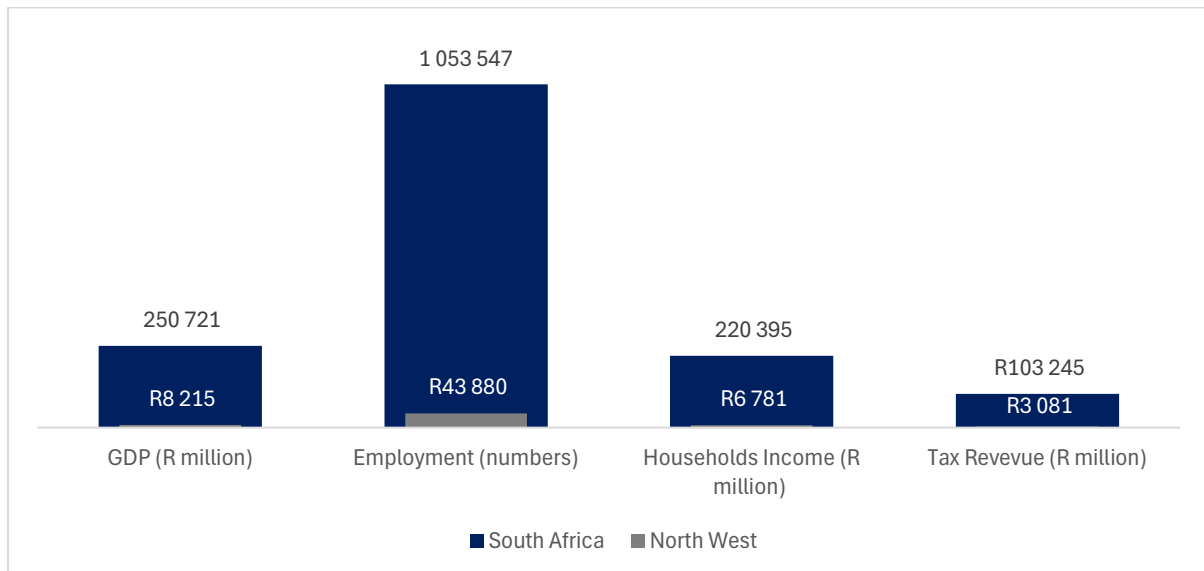


Figure 60: North West's CCI&S economic contribution

4.7.2.1. Contribution to GDP

North-West province had a GDP of R419 billion (2021 current prices) in 2021, which translates to 6.8% of South Africa's GDP. The CCI&S contribution to the North-West's GDP was R8.2 billion (2021 current prices), which represents 2% of the province's total GDP and 3.3% of South Africa's CCI&S GDP. The figure below represents the CCI&S domain in North-West. The Sports and Recreation, Audio-Visual & Interactive Media and Design and creative services domains are the largest contributors to CCI&S GDP in North-West.

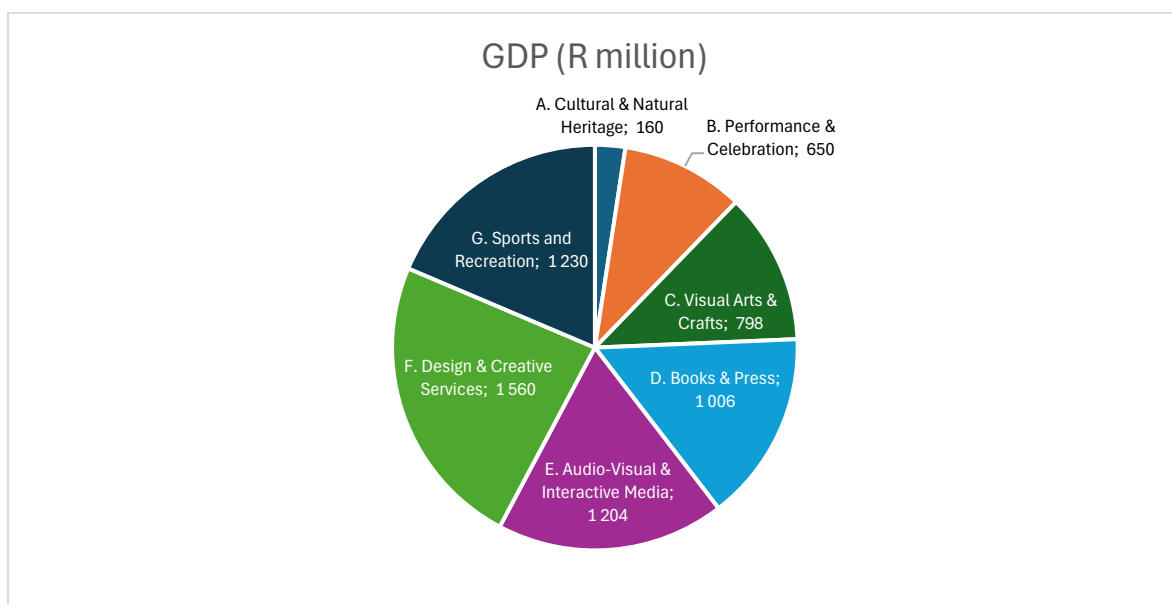


Figure 61: North West's CCI&S GDP Contribution by Domain

4.7.2.2. Contribution to Cultural and Sports Employment

In 2021, 942,164 people were employed in North-West (6.5% of national employment). During the same period, the cultural and sports industries in North-West employed 43,880⁶⁵ individuals, which translates to 4.2% of cultural and sports occupations nationally. The cultural occupations in the North-West make up 4.7% of the province's total employment.

Of the 43,880 jobs, 14,965 were creative occupations in the creative industries and creative occupations in other industries, while 28,915 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in North West.

Table 20: North West's Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % contribution
A. Cultural & Natural Heritage	32	0%	5,839	1%
B. Performance & Celebration	1,954	4%	62,582	3%
C. Visual Arts & Crafts	-	0%	27,792	0%
D. Books & Press	5,875	13%	148,069	4%
E. Audio-Visual & Interactive Media	14,438	33%	394,952	4%
F. Design & Creative Services	15,655	36%	319,931	5%
G. Sports and Recreation	4,984	11%	61,377	8%
Education	942	2%	33,005	3%
Total	43,880	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that a large number of jobs are in the Audio-Visual & Interactive Media (33%), Design & Creative Services (36%) and Book and Press (13%) domains, similar to the national patterns.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in Appendix 1.

Of the 43,880 cultural and sports occupations, 38,006 (87%) were occupied by Blacks/Africans, followed by Whites at 10%. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

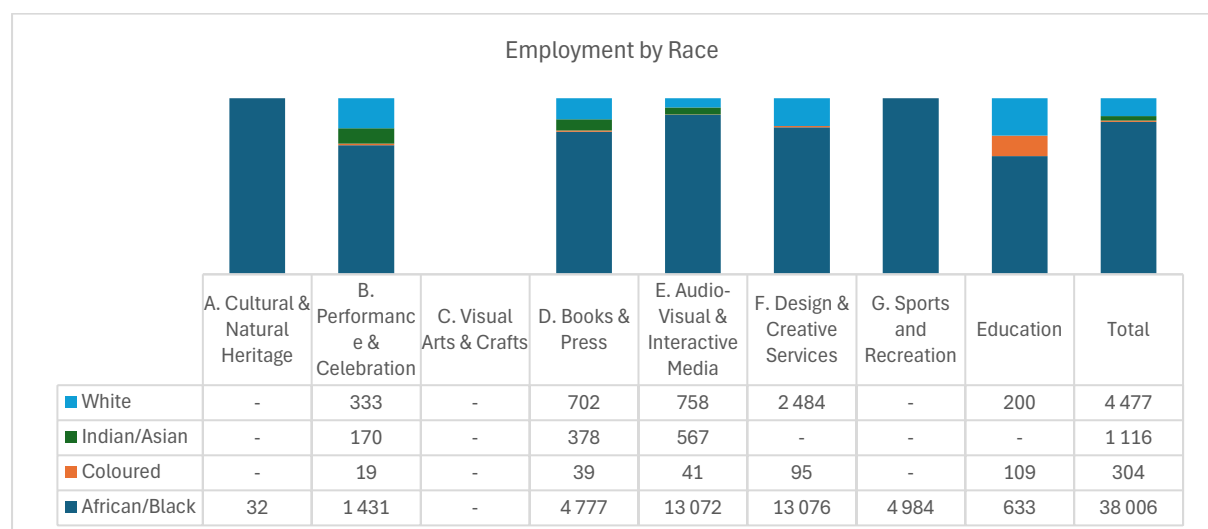


Figure 62: North West's CCI&S Occupations by Race

⁶⁵ StatsSA LMDS

The cultural occupations in North West had more females than males. Of the 43,880 cultural and sports occupations, 22,897 (52%) were occupied by females, compared to the national average of 55% males and 45% females.

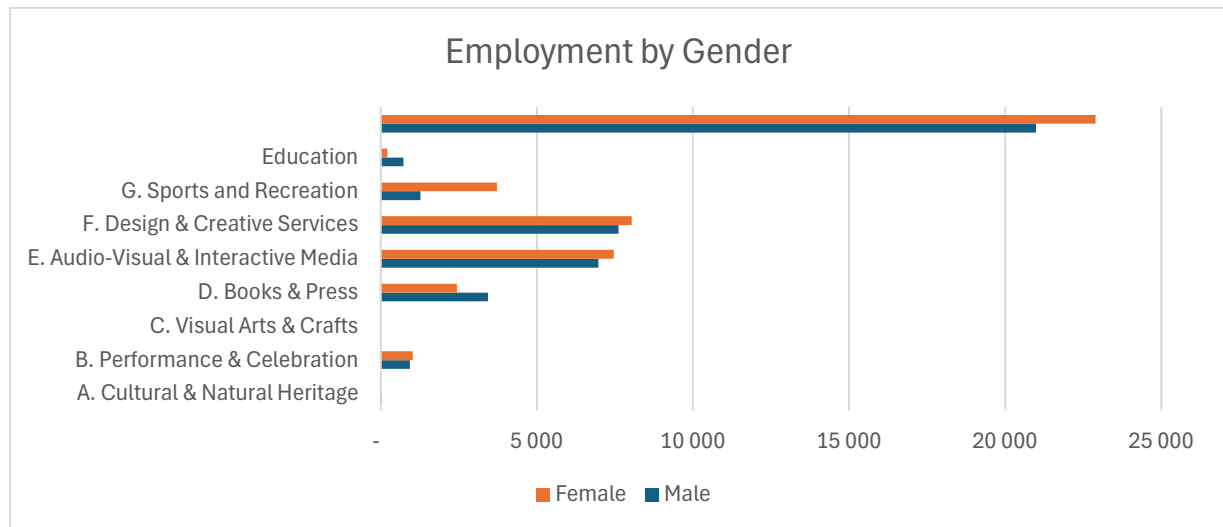


Figure 63: North West's CCI&S Occupations by Gender

The analysis by age indicates that the age categories 35-39, 45-49 and 25-29 had a greater proportion of cultural occupations (52%), collectively. In North West, 35% of cultural occupations were occupied by youth (15-34 years), which is lower than the national average of 38%.

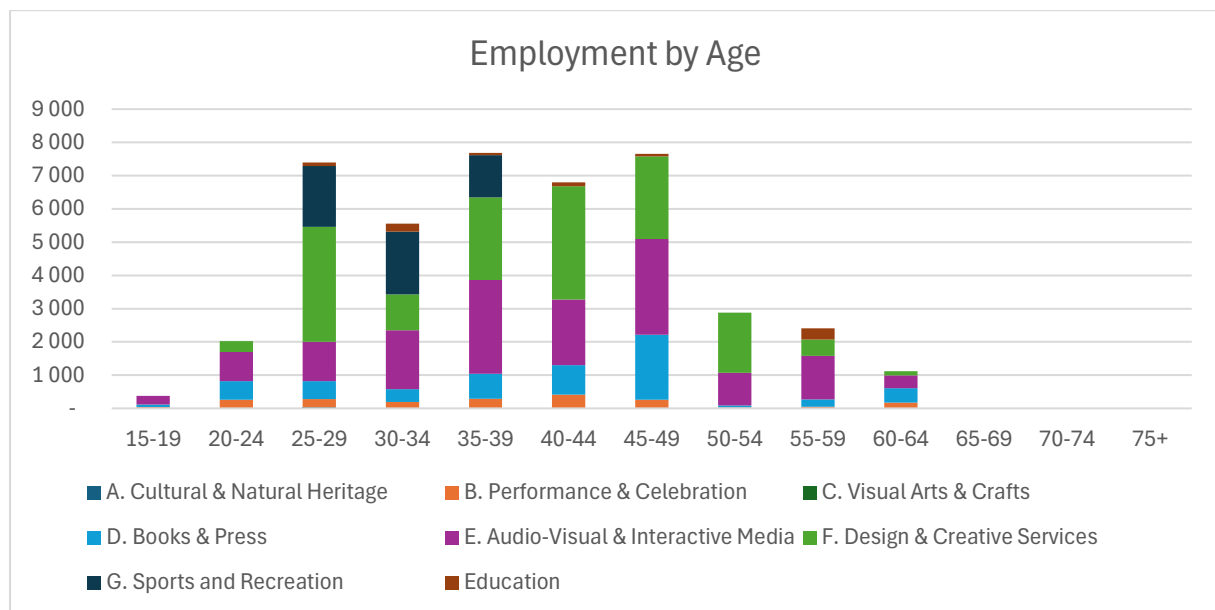


Figure 64: North West's CCI&S Occupations by Age

With regards to employment by education, only 13% of cultural and sports occupations in North West had tertiary education, significantly lower than the national average of 20%. A significant number (46%) had secondary education completed while 31% had not completed their secondary education. Significant low levels of education can be a constraint for the sector, from a growth and developmental perspective. Provinces with relatively higher levels of education (Gauteng) in the industry have seen better growth prospects. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

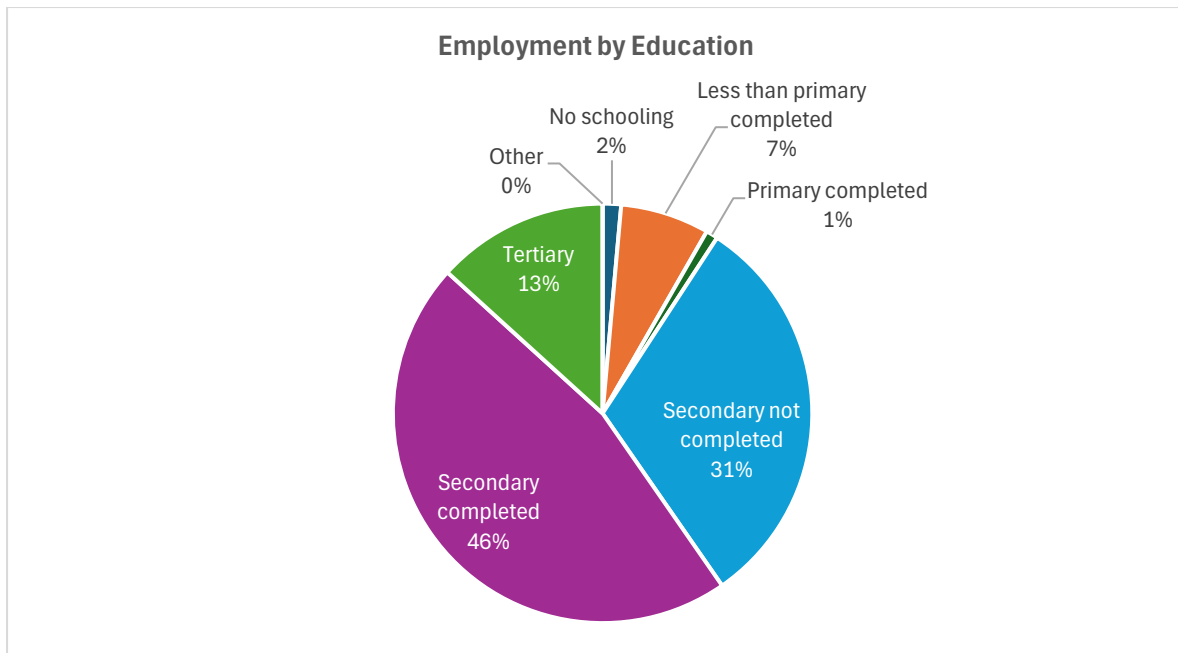


Figure 65: North West's CCI&S Occupations by Education

4.7.2.3. Contribution to Trade

North-West cultural exports were R64.7⁶⁶ million in 2021, up from R55.4⁶⁷ million in 2020. This makes North-West the seventh largest exporter of CCI&S nationally. The key exports from North-West are in the Culture and Natural Heritage domain.

As a share of total exports in North-West, the CCI&S share was 0,02% in 2021. The table below highlights the exports of CCI&S by domain in North-West.

Table 21: North-West exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	41.1	46.7	42.2	46.26
Performance and Celebration	1.2	0.9	1.8	2.10
Visual Arts and Crafts	3.6	4.6	7.6	7.94
Books and Press	1.4	5	3.8	3.75
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	4.61
CCI&S Exports	47.3	57.2	55.4	64.66
Total Exports	144,177	154,747	211,023	343,003
CCI&S Share of Exports	0.03%	0.04%	0.03%	0.02%

Source: Quantec, SARS

The imports in North-West were R21.9⁶⁸ million in 2021, down from R17⁶⁹ million in 2020. The CCI&S in North-West accounts for 0.27% of total exports in 2021. North-West imports goods in the Performance and Celebration, Cultural and Natural Heritage and Sport domains.

⁶⁶ Includes exports of sporting goods in 2021

⁶⁷ Excludes exports of sporting goods in 2020

⁶⁸ Includes imports of sporting goods in 2021

⁶⁹ Excludes imports of sporting goods in 2020

Table 22: North-West imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	10.7	9.3	15.3	5.65
Performance and Celebration	1	4.8	2.2	5.02
Visual Arts and Crafts	3.7	2.5	1.9	3.07
Books and Press	3.6	5.3	2.2	2.71
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	5.40
CCI&S Imports	19	21.90	21.60	21.86
Total Imports	6,736	6,035	5,918	8,173
CCI&S Share of Imports	0.28%	0.36%	0.37%	0.27%

Source: Quantec, SARS

North-West CCI&S Balance of Trade has been positive over the period 2018 to 2021, and on an upward trajectory over the same period. The graph below illustrates the Balance of Trade movement for trade of cultural goods.

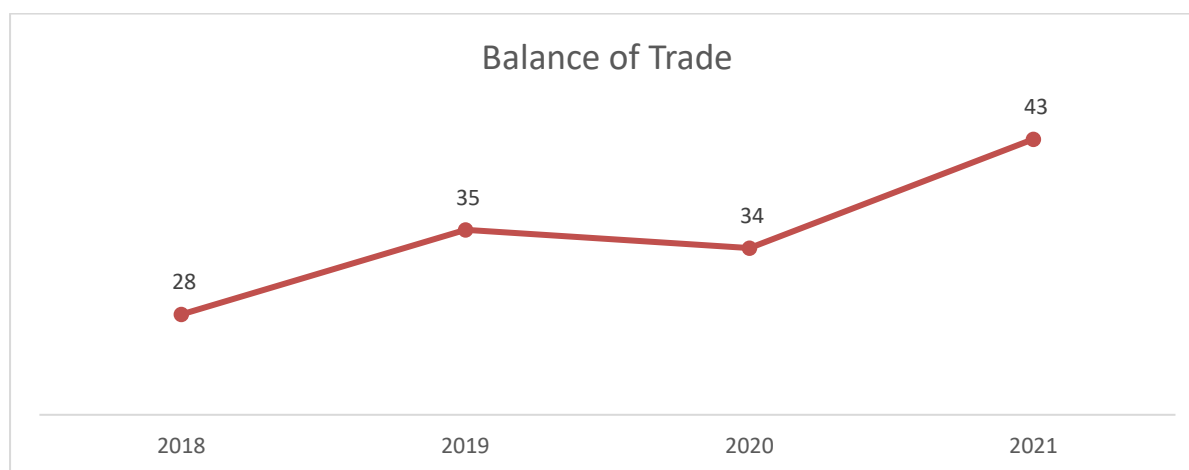


Figure 66: North-West CCI&S Balance of Trade

4.7.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in North-West's economy increased total government revenue by an estimated R3.1 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain contributes almost 22% of the tax revenue generated by CCI&S in North West, followed by the Audio Visual & Interactive Media (22%) domain.

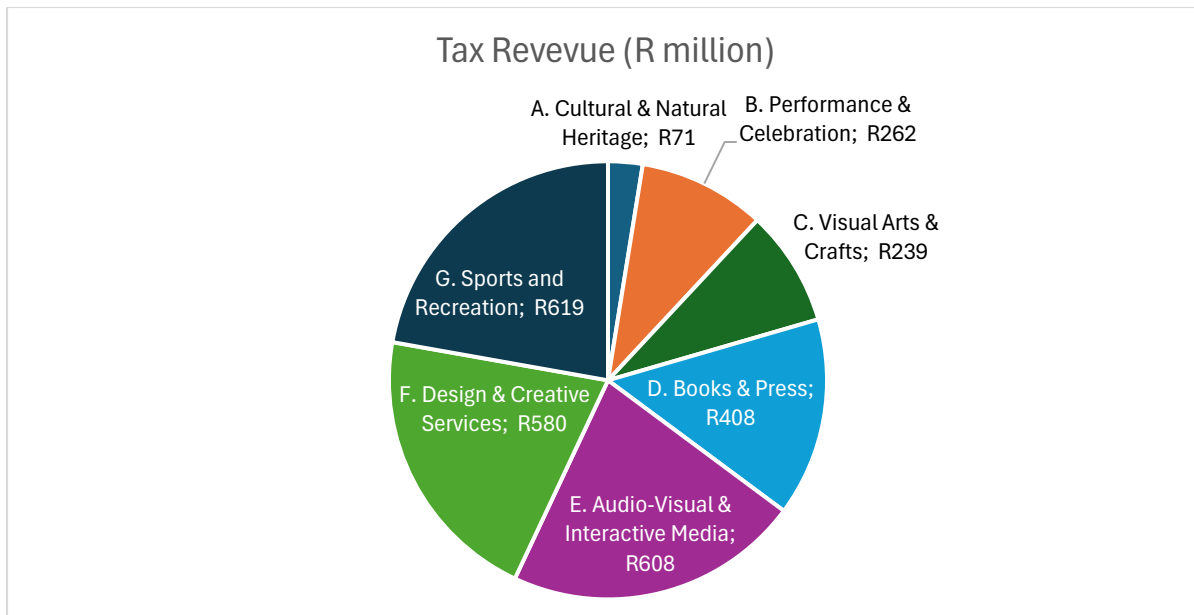


Figure 67: North West's CCI&S Tax Revenue Contribution by Domain

4.7.2.5. Contribution to Poverty Reduction

The CCI&S contribute towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in North-West was nearly R6.8 billion in 2021, an estimated R1.8 billion of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

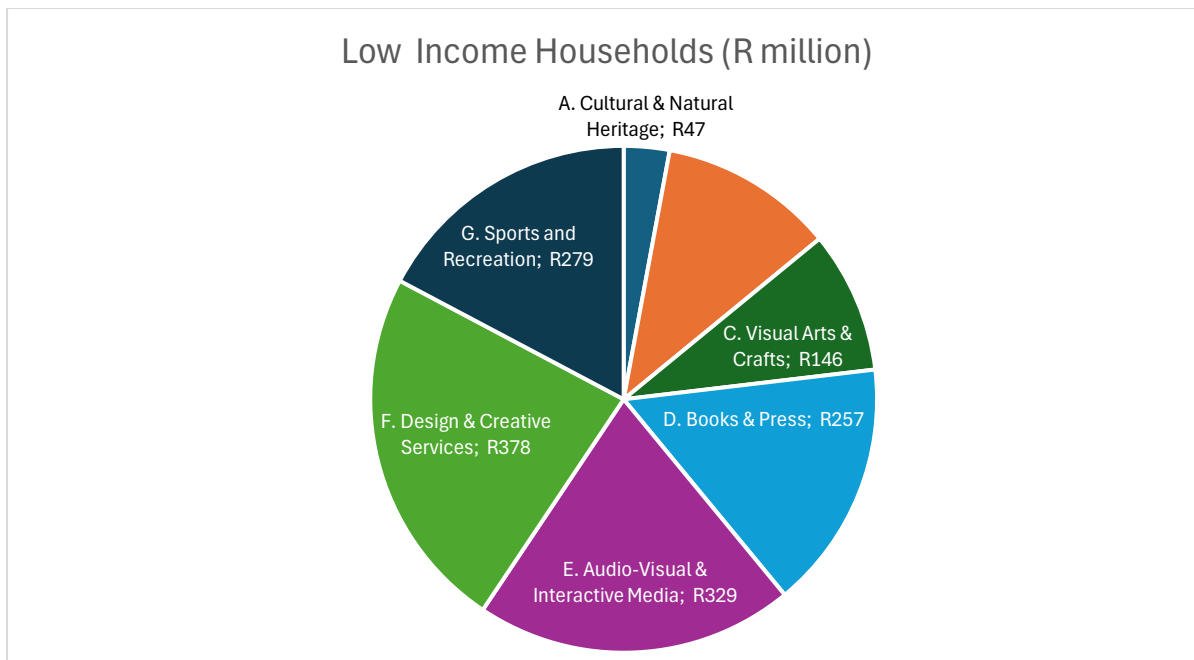


Figure 68: North West's CCI&S Domain Contribution to Low Income Household

4.8. Northern Cape

4.8.1. Northern Cape's economy in context

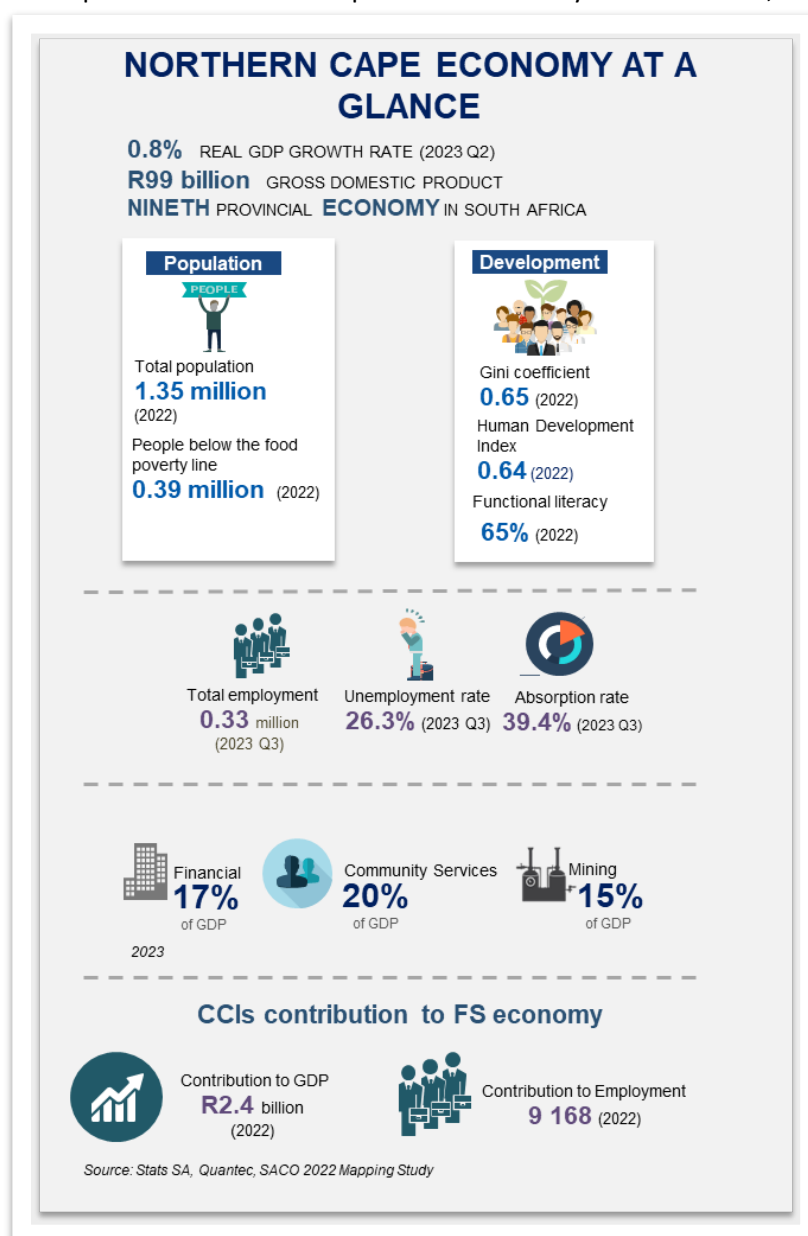
The Northern Cape province had a real GDP q-o-q growth rate of 0.8% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period expanded by 0.6%. Northern Cape has had an annual average growth rate of 0.98% between 2012 and 2022. The province had the fourth highest average annual growth after Western Cape (1.07%), KZN (1.07%) and Gauteng (1.03%).

The province has the least provincial economy in South Africa, with a real GDP of R99 billion in 2022.

During this period, the province generated 2% of South Africa's GDP.

The main economic sectors contributing to the province's economic growth in 2022 were the Community Services (20%), Financial Services (17%) and Mining (15%).

Northern Cape had a moderately diversified economy as indicated by the Tress Index score of 34.7 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁷⁰ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal vulnerability. Northern Cape ranked second amongst the



nine provinces after Mpumalanga.

⁷⁰ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

Northern Cape had an unemployment rate of 26.3%, which was lower than the national average of 31.9% recorded in the third quarter of 2023.⁷¹ The absorption rate, which is the proportion of the working-age population employed, was 39.4% in the province in the third quarter of 2023. This is lower than the South African absorption rate of 41%. Total employment in the province was 328 000 in this quarter.

In addition to high unemployment, income inequality burdens the province. In 2022, Northern Cape's Gini-coefficient⁷² was 0.65, which is the seventh highest of the nine provinces.⁷³ The United Nations Development Programme's Human Development Index (HDI)⁷⁴ of 0.737 in 2020 indicated that human development was in the medium range of 0.7 to 0.799.⁷⁵ An HDI score of 1 indicates a high level of economic development, 0 a very low level. Northern Cape's HDI was lower than the national HDI of 0.68. A further economic and social challenge is the high level of poverty facing the Northern Cape residents. In 2022, as estimated 390 706 (30%) individuals lived below the food poverty line of R553, a smaller share than the national average of 35%.⁷⁶

The creative industry has had an impact on the economy of the Northern Cape. The industry is estimated to have contributed R2.4 billion (2.45%) to the GDP of the Northern Cape. The industry also employed 9 168 people or 2.8% of total employment in the Northern Cape.

4.8.2. Northern Cape's CCI&S Contribution

The figure below summarises the contribution of the CCI&S to the economies of Northern Cape and South Africa. These contributions are analysed in the next sections.

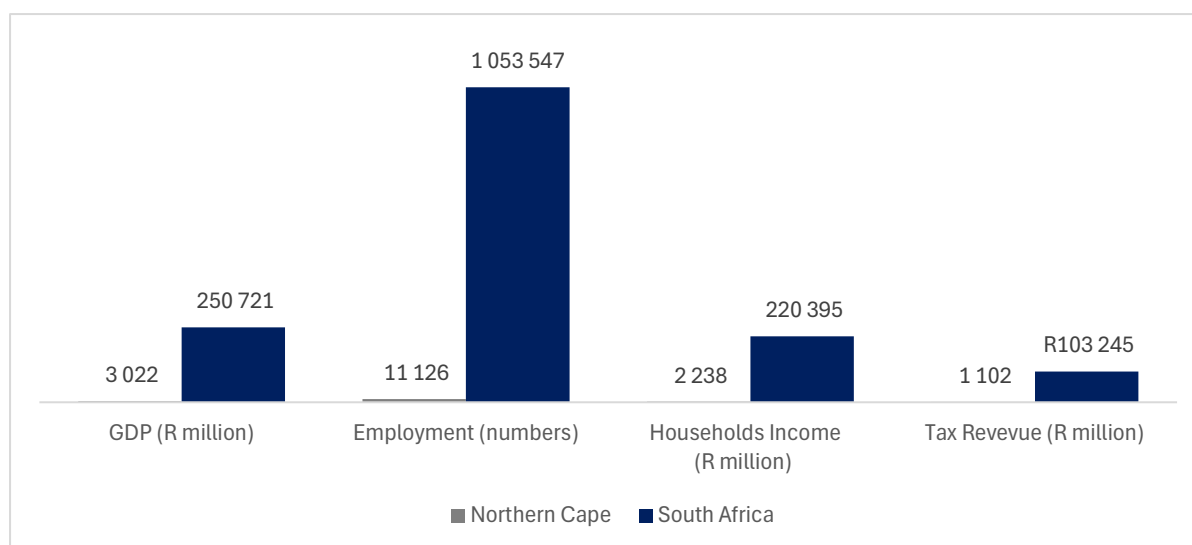


Figure 69: Northern Cape's CCI&S economic contribution

⁷¹ StatsSA Statistical release P0211 Quarterly Labour Force Survey Quarter 4:2023

⁷² The Gini-coefficient measures income inequality. This measure ranges from zero to one, zero indicating perfect equality and one indicating a situation where one household all earns all the income.

⁷³ Quantec, 2022

⁷⁴ The HDI is "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living."

⁷⁵ UNDP Human Development Report 2021/2022

⁷⁶ Quantec, 2022

4.8.2.1. Contribution to GDP

The Northern Cape province had a GDP of R141 billion (2021 current prices) in 2021, which translates to 2.3% of South Africa's GDP. The CCI&S contribution to Northern Cape's GDP was R1.2 billion (2021 current prices), which represents 2.1% of the province's total GDP and 1.2% of South Africa's CCI&S GDP. The figure below represents the CCI&S domain in Northern Cape. The Sports and Recreation, Audio-Visual & Interactive Media and Design and creative services domains are the largest contributors to CCI&S GDP in Northern Cape.

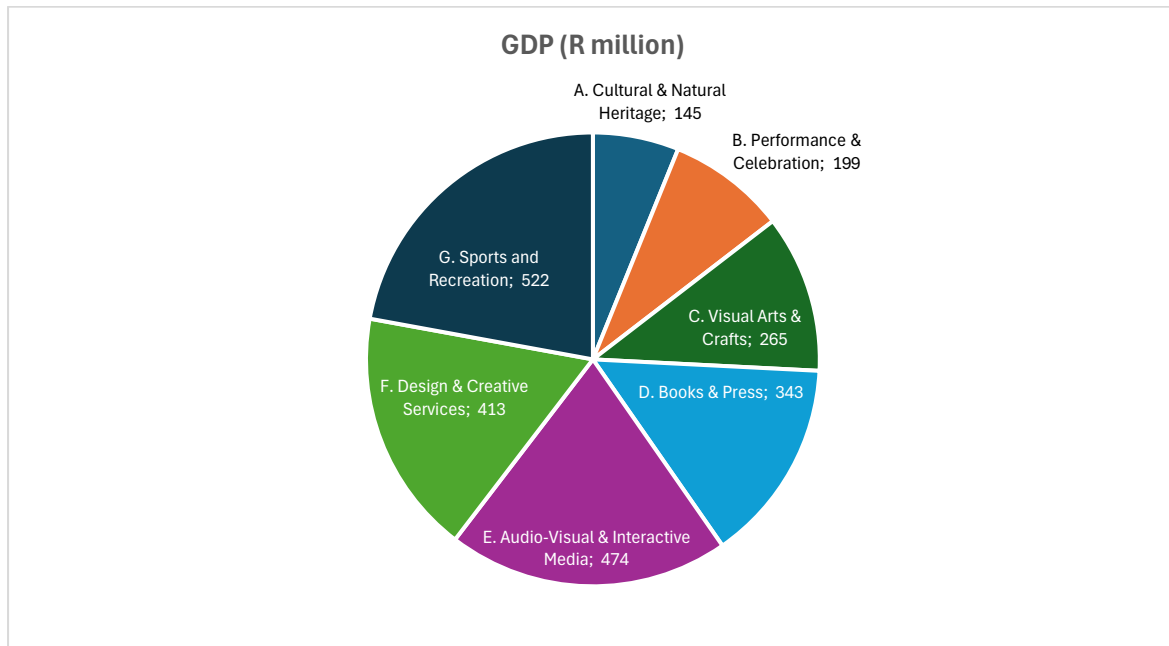


Figure 70: Northern Cape's CCI&S GDP Contribution by Domain

4.8.2.2. Contribution to Cultural and Sports Employment

In 2021, 295,806 people were employed in the Northern Cape (2% of national employment). During the same period, the cultural and sports industries in the Northern Cape employed 11,126⁷⁷ individuals, which translates to 1.1% of cultural and sports occupations nationally. The cultural occupations in the North-West make up 3.8% of the province's total employment.

Of the 11,126 jobs, 3,795 were creative occupations in the creative industries and creative occupations in other industries, while 7,332 occupations were in non-creative industries supportive of the creative industry. The table below provides a summary of creative and sports occupations by domain in the Northern Cape.

Table 23: Northern Cape's Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % contribution
A. Cultural & Natural Heritage	325	3%	5,839	6%
B. Performance & Celebration	768	7%	62,582	1%
C. Visual Arts & Crafts	58	1%	27,792	0%
D. Books & Press	2,305	21%	148,069	2%
E. Audio-Visual & Interactive Media	2,915	26%	394,952	1%
F. Design & Creative Services	4,086	37%	319,931	1%
G. Sports and Recreation	428	4%	61,377	1%

⁷⁷ StatsSA LMDS

Education	241	2%	33,005	1%
Total	11,126	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that a large number of jobs are in the Audio-Visual & Interactive Media (26%), Design & Creative Services (37%) and Book and Press (21%) domains, similar to the national patterns.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 11,126 cultural and sports occupations, 5 423 (49%) were occupied by Blacks/Africans, followed by Coloureds at 43%. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

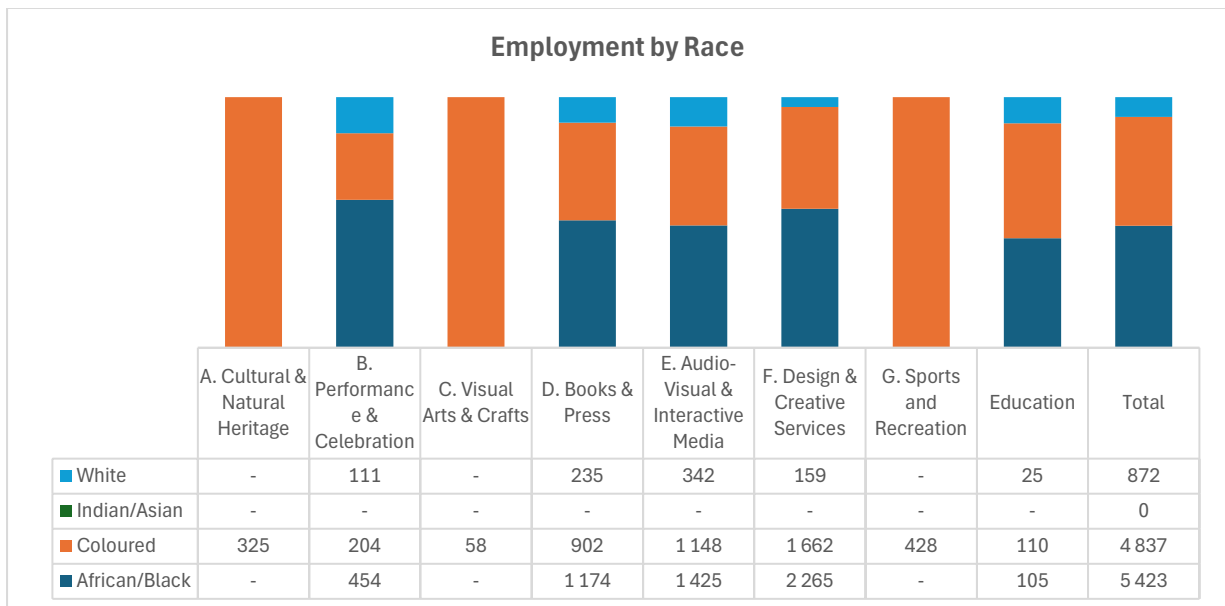


Figure 71: Northern Cape's CCI&S Occupations by Race

The cultural occupations in Northern Cape had a significantly higher proportion of males than females. Of the 11,126 cultural and sports occupations, 7,434 (67%) were occupied by males, compared to the national average of 55% males and 45% females.

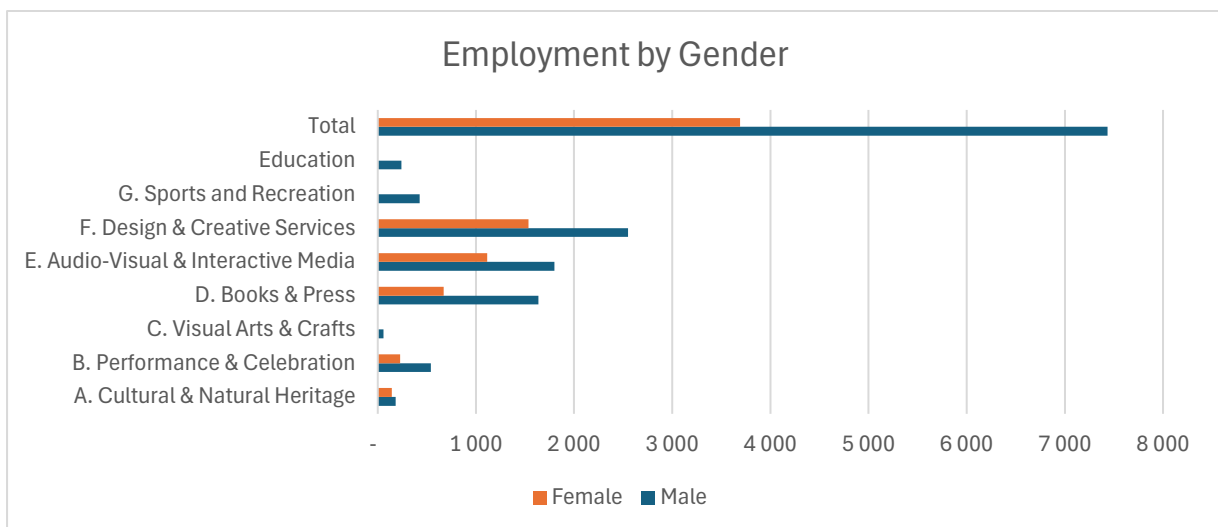


Figure 72: Northern Cape's CCI&S Occupations by Gender

The analysis by age indicates that the age categories 25-29 had a greater proportion of cultural occupations (25%). In Northern Cape, a significant proportion of cultural occupations (52%) were occupied by youth (15-34 years), which is commendably higher than the national average of 38%.

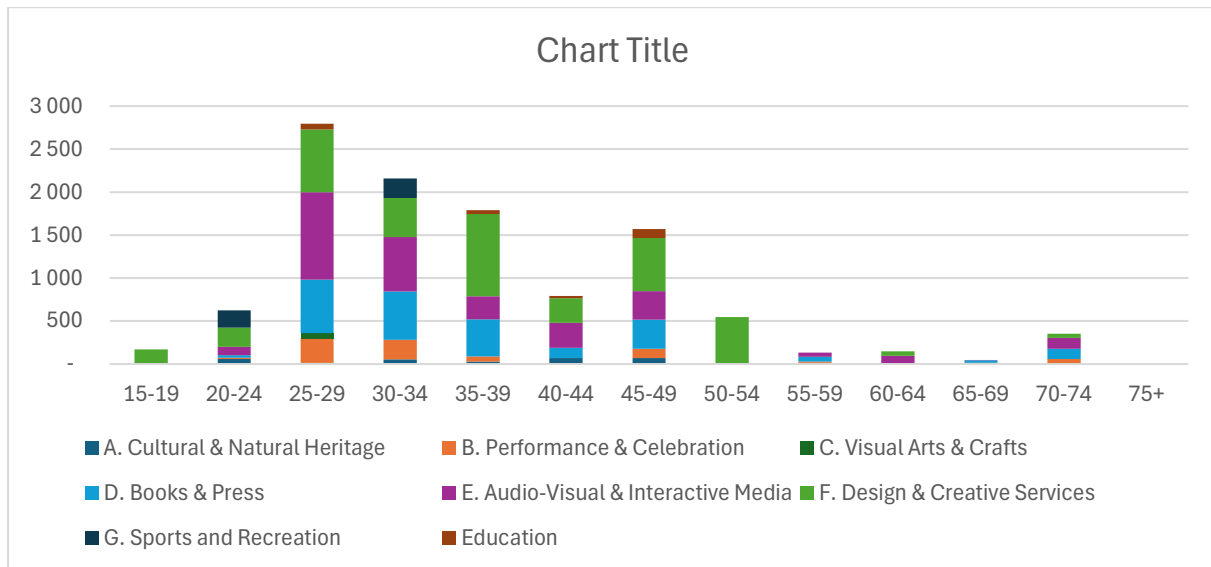


Figure 73: Northern Cape's CCI&S Occupations by Age

With regards to employment by education, only 11% of cultural and sports occupations in Northern Cape had tertiary education, significantly lower than the national average of 20%. A significant number (49%) had secondary education completed while 34% had not completed their secondary education. Significant low levels of education can be a constraint for the sector, from a growth and developmental perspective. Provinces with relatively higher levels of education (Gauteng) in the industry have seen better growth prospects. Refer to Appendix 1 for a breakdown of education occupations by domain.

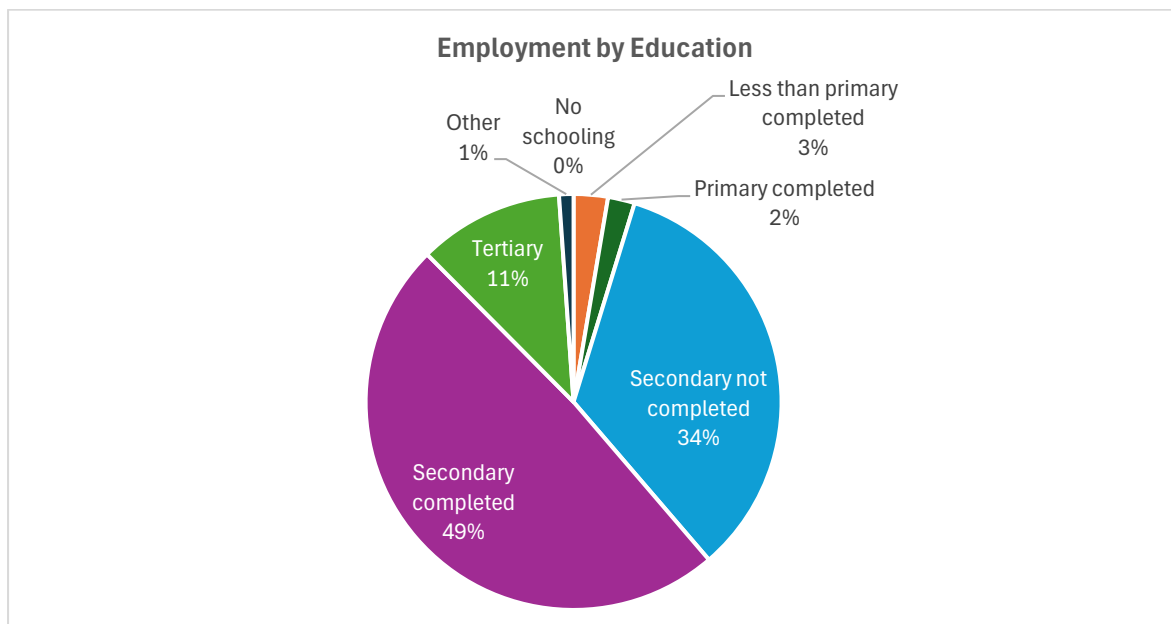


Figure 74: Northern Cape's CCI&S Occupations by Education

4.8.2.3. Contribution to Trade

The Northern Cape cultural exports were R3.31⁷⁸ million in 2021, up from R1.80⁷⁹ million in 2020. This makes Northern Cape the ninth exporter of cultural goods in South African. The key cultural exports from Northern Cape are in the Cultural and Natural Heritage domain.

As a share of total exports in the Northern Cape, the CCI&S share was 0,05% in 2021, up from 0.03% in 2020. The table below highlights the exports of CCI&S by domain in the Northern Cape.

Table 24: Northern Cape exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	1.1	1.6	1.7	2.73
Performance and Celebration	0.2	0.2	0	0.16
Visual Arts and Crafts	0.3	0.2	0	0.20
Books and Press	0.9	0.7	0.1	0.14
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	0.08
CCI&S Exports	2.5	2.70	1.80	3.31
Total Exports	4,120	4,380	7,172	6,839
CCI&S Share of Exports	0.06%	0.06%	0.03%	0.05%

Source: Quantec, SARS

The imports in the Northern Cape were R2.15 million in 2021. Over the period 2018 to 2021, cultural imports in the Northern Cape declined by over 64%. This is mainly due to a decline in the imports of Cultural and Natural Heritage goods, which constituted over 90% of total CCI&S imports.

Table 25: Northern Cape imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	44.3	28.4	2.4	0.48
Performance and Celebration	0.1	0.1	0	0.09
Visual Arts and Crafts	0.2	0.3	0	0.83
Books and Press	1.2	0.2	0	0.09
Audio-visual and Interactive Media	0	0	0	-
Design and Creative Services	0	0	0	-
Sports and Recreation	0	0	0	0.67
CCI&S Imports	46	29	2.7	2.15
Total Imports	1,057	1,212	997	1,760
CCI&S Share of Imports	4.33%	2.39%	0.27%	0.12%

Source: Quantec, SARS

Northern Cape CCI&S Balance of Trade has been negative, with imports exceeding exports over the period 2018 to 2020. A slightly positive Balance of Trade is recorded in 2021, mainly because of a massive decline in the imports of Cultural and Natural Heritage. The graph below illustrates the Balance of Trade movement.

⁷⁸ Includes exports of sporting goods in 2021

⁷⁹ Excludes exports of sporting goods in 2021



Figure 75: Northern Cape CCI&S Balance of Trade

4.8.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in the Northern Cape's economy increased total government revenue by an estimated R1.1 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Sports and Recreation domain contributes almost 27% of the tax revenue generated by CCI&S in the Northern Cape, followed by the Audio Visual & Interactive Media (2%) domain.

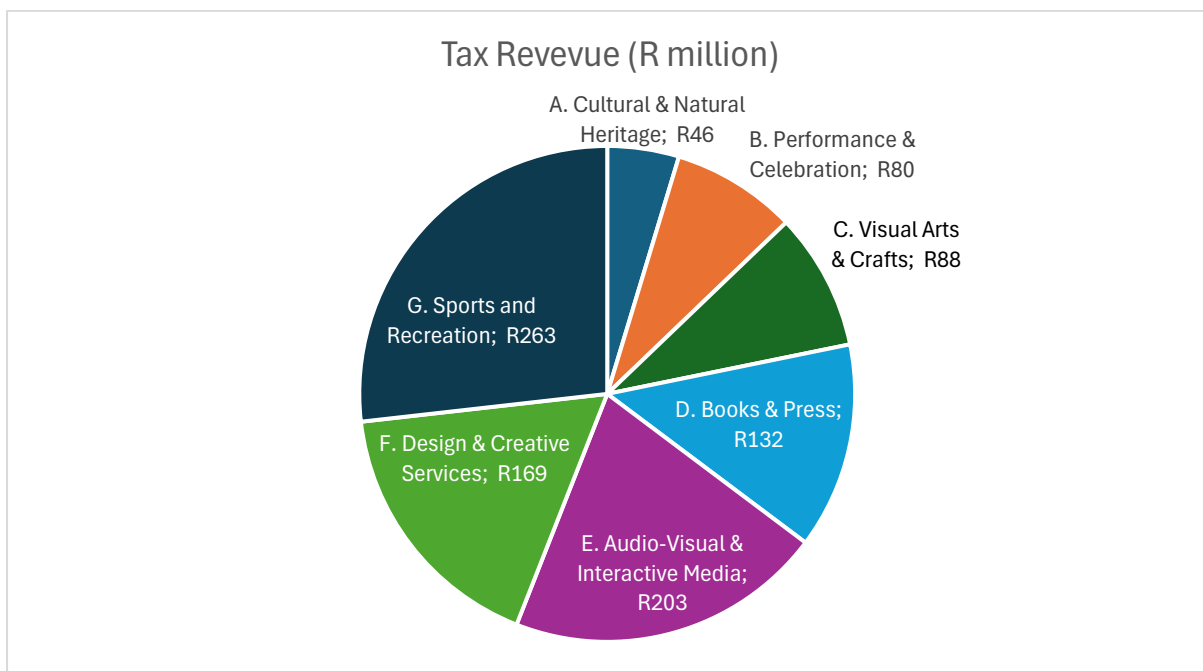


Figure 76: Northern Cape's CCI&S Tax Revenue Contribution by Domain

4.8.2.5. Contribution to Poverty Reduction

The CCI&S contribute towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in the Northern Cape was nearly R2.2 billion in 2021, an estimated R638 million of which flowed to lower income households. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

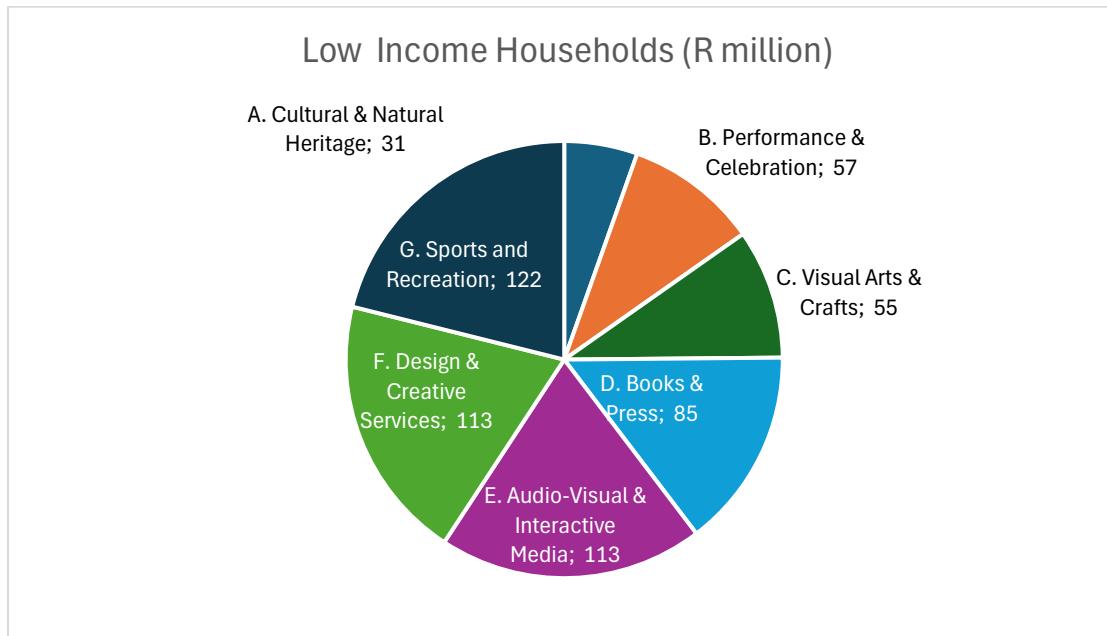


Figure 77: Northern Cape's CCI&S Domain Contribution to Low Income Household

4.9. Western Cape

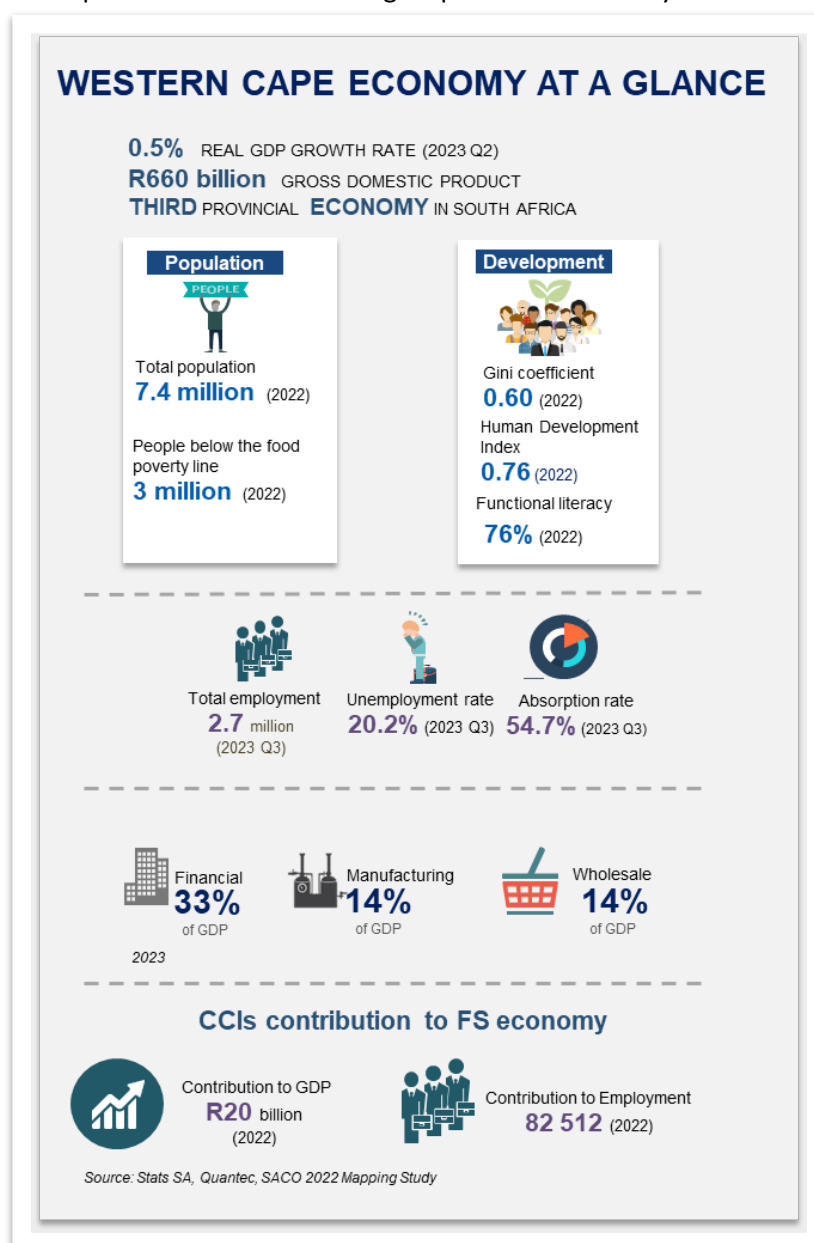
4.9.1. Western Cape's economy in context

The Western Cape province had a real GDP q-o-q growth rate of 0.5% in the second quarter of 2023. The national quarter-to-quarter GDP in the same period expanded by 0.6%. Western Cape has had an annual average growth rate of 1.067% between 2012 and 2022. The province had the highest average annual growth, marginally ahead of KZN (1.066%) and Gauteng (1.03%).

The province has the third largest provincial economy in South Africa, with a real GDP of R660 billion in 2022. During this period, the province generated 14% of South Africa's GDP, behind Gauteng (34%) and KZN (17%).

The main economic sectors contributing to the province's economic growth in 2022 were the Financial Services (33%), Wholesale Trade (15%) and Manufacturing (15%).

Western Cape had a moderately diversified economy as indicated by the Tress Index score of 49.5 in 2022. The Tress Index measures the level of diversification in an economy. Diversification is the measure of how vulnerable an economy is to exogenous factors such as climatic conditions and price fluctuations. The Tress Index is calculated by ranking sector contribution to GDP, allocating weights to the sectors based on their position, calculating the sum total of the weighted values and converting the values into index format.⁸⁰ An index score close to 100 is indicative of a concentrated economy with high vulnerability, whilst an index score close to zero indicates diversification and minimal



vulnerability. Western Cape ranked sixth amongst the nine provinces.

⁸⁰ Development Bank of South Africa. Guidelines to Regional Socio-Economic Analysis

Western Cape had an unemployment rate of 20.2%, which was lower than the national average of 31.9% recorded in the third quarter of 2023.⁸¹ This is also lowest unemployment rate in the country. The absorption rate, which is the proportion of the working-age population employed, was 54.7% in the province in the third quarter of 2023. This is higher than the South African absorption rate of 41%. Total employment in the province was 2.7 million in this quarter.

In addition to high unemployment, income inequality burdens the province. In 2022, Western Cape's Gini-coefficient⁸² was 0.60, which is the highest of the nine provinces.⁸³ This makes the Western Cape the most unequal province in South Africa. The United Nations Development Programme's Human Development Index (HDI)⁸⁴ of 0.737 in 2020 indicated that human development was in the medium range of 0.7 to 0.799.⁸⁵ An HDI score of 1 indicates a high level of economic development, 0 a very low level. Western Cape's HDI was lower than the national HDI of 0.68. A further economic and social challenge is the high level of poverty facing the Western Cape residents. In 2022, as estimated 3 million (42%) individuals lived below the food poverty line of R652, a bigger share than the national average of 35%.⁸⁶

The creative and sports economy play a critical role in the economy of the Western Cape. The industry is estimated to have contributed R20 billion (3%) to the GDP of the Western Cape. The industry also employed 82 500 people in the Western Cape.

4.9.2. Western Cape's CCI&S Contribution

Western Cape is the third largest economy of the nine provinces of South Africa, after Gauteng and KwaZulu Natal. This section summaries the contribution of CCI&S to the Western Cape's and the national economy. The figure below summaries the economic performance of the industry in 2021, using the key economic variables: GDP, Employment, Household Income and Tax Revenue.

⁸¹ StatsSA Statistical release P0211 Quarterly Labour Force Survey Quarter 4:2023

⁸² The Gini-coefficient measures income inequality. This measure ranges from zero to one, zero indicating perfect equality and one indicating a situation where one household all earns all the income.

⁸³ Quantec, 2022

⁸⁴ The HDI is "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living."

⁸⁵ UNDP Human Development Report 2021/2022

⁸⁶ Quantec, 2022

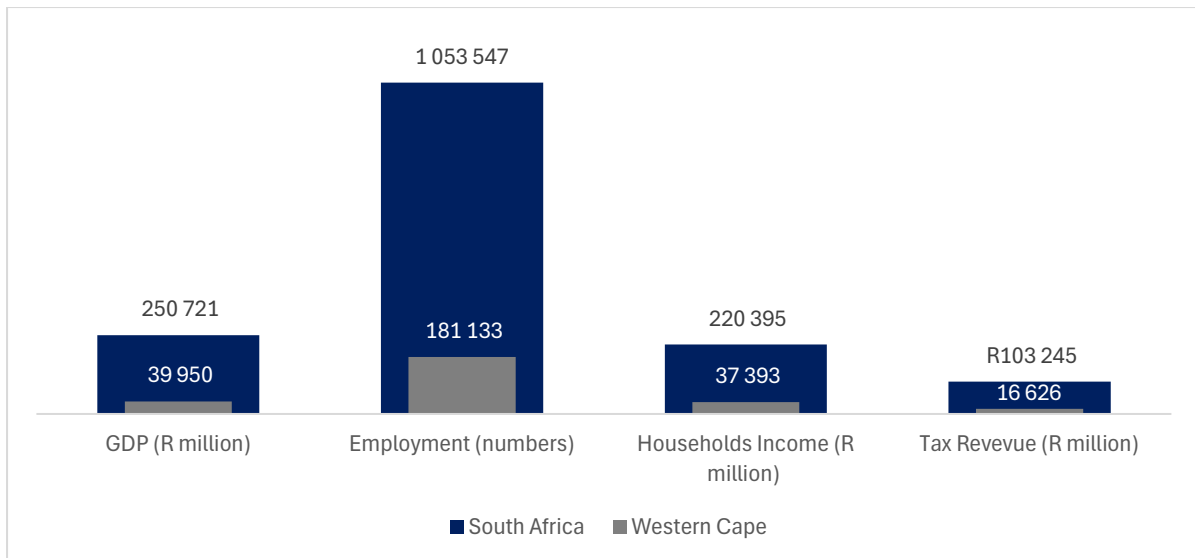


Figure 78: Western Cape's CCI&S economic contribution

4.9.2.1. Contribution to GDP

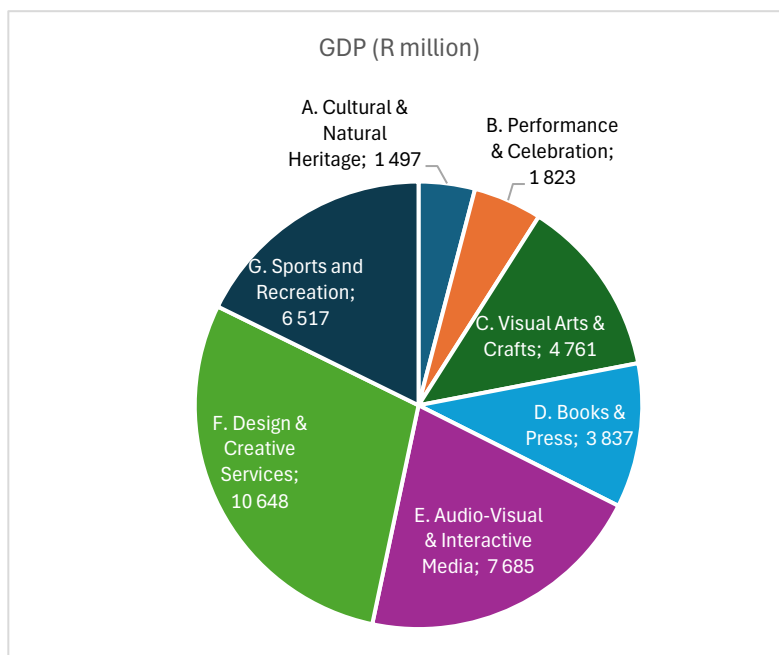


Figure 79: Western Cape's CCI&S GDP Contribution by Domain

In 2021, Western Cape had a GDP of R841 billion (market prices), which translates to 13.6% of the national GDP. Western Cape's CCI&S contribution to the province's GDP was R39.3 billion (market prices), which represents 4.7% of the province's total GDP and 15.9% of South Africa's CCI&S GDP. The figure below is a representation of Western Cape's CCI&S GDP by domain. The Design and Creative Services (29%), the Audio-Visual & Interactive Media (21%) and Sports and Recreation domains contribute significantly to GDP in the province.

4.9.2.2. Contribution to Cultural and Sports Employment

In 2021, 2.3 million people were employed in the Western Cape (15.9% of national employment). During the same period, the cultural and sports industries in the Western Cape employed 181,133⁸⁷ individuals, which translates to 17.2% of cultural and sports occupations nationally. The cultural occupations in the Western Cape make up 7.9% of the province's total employment.

Of the 181,133 jobs, 61 774 were creative occupations in the creative industries and creative occupations in other industries, while 119 359 occupations were in non-creative industries supportive

⁸⁷ StatsSA LMDS

of the creative industry. The table below provides a summary of creative and sports occupations by domain in the Western Cape.

Table 26: Western Cape's Cultural and Sports occupations

Domains	# of jobs	% distribution	SA Total	SA % distribution
A. Cultural & Natural Heritage	411	0%	5,839	7%
B. Performance & Celebration	10,197	6%	62,582	16%
C. Visual Arts & Crafts	6,838	4%	27,792	25%
D. Books & Press	24,110	13%	148,069	16%
E. Audio-Visual & Interactive Media	59,781	33%	394,952	15%
F. Design & Creative Services	61,261	34%	319,931	19%
G. Sports and Recreation	11,441	6%	61,377	19%
Education	7,095	4%	33,005	21%
Total	181,133	100%	1,053,547	

Source: StatsSA LMDS 2021

The above table shows that most jobs were in the Design & Creative Services (34%), Audio-Visual & Interactive Media (33%) and Book and Press (13%) domains, which mirrors the national patterns.

The cultural and sports occupations by race, education and gender in the province are presented in the next set of graphs. Detailed information on the distribution of cultural and sports occupations is in [Appendix 1](#).

Of the 181,133 cultural and sports occupations, 63,700 (35.2%) were occupied by Coloureds, 63,686 (35.1%) by Blacks/Africans, 51,833 (29%) Whites and 1,999 (1%) Indians. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 1%.

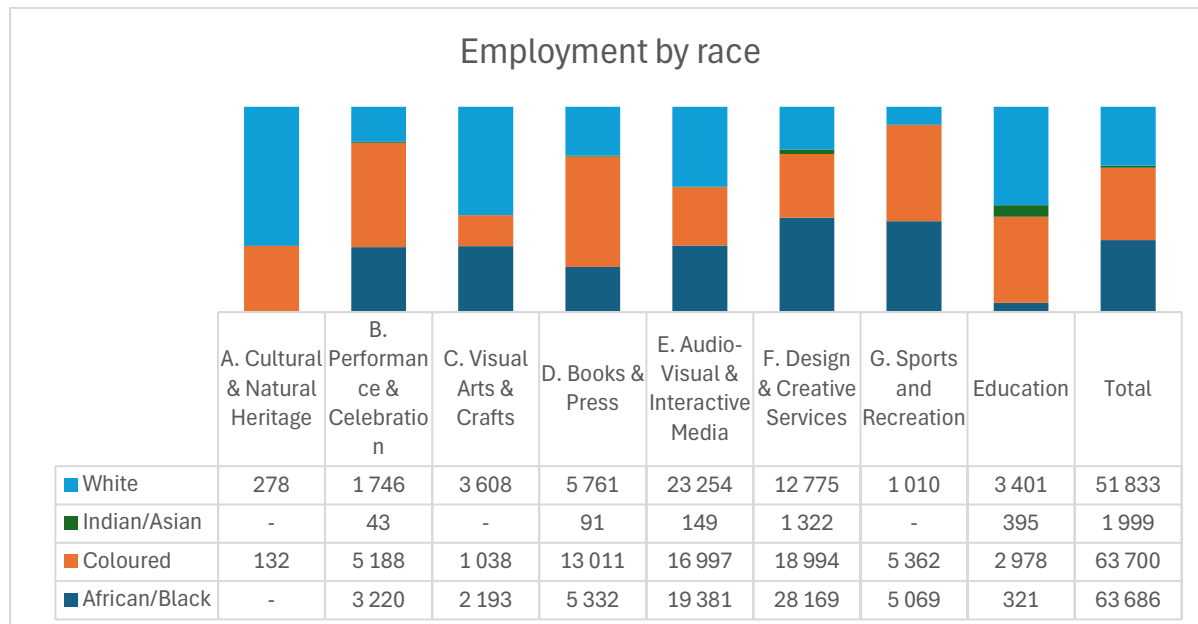


Figure 80: Western Cape's CCI&S Occupations by Race

Of the 181,133 cultural and sports occupations, 93,133 (51%), compared the national average of 55% males and 45% females. The Design and Creative Services employed more males, while the Audio-Visual and Books and Press employed more females.

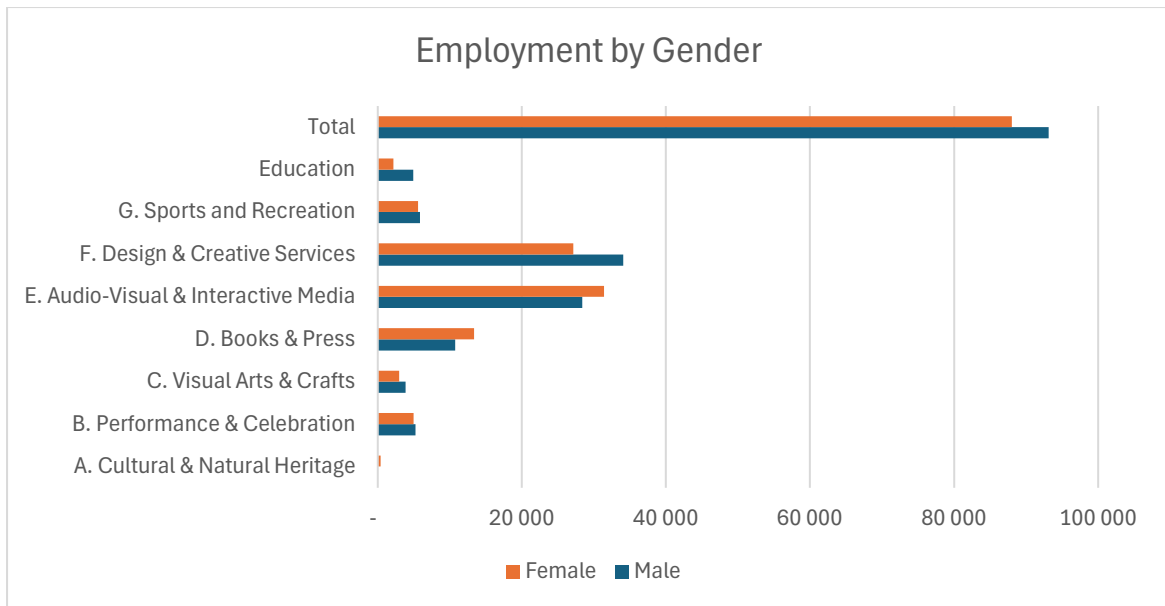


Figure 81: Western Cape's CCI&S Occupations by Gender

The analysis by age indicates that the 35-39 age category had a greater proportion of cultural occupations. In the Western Cape, 33% of cultural and sports occupations were occupied by youth (15-34 years), which is lower than the national average of 38%.

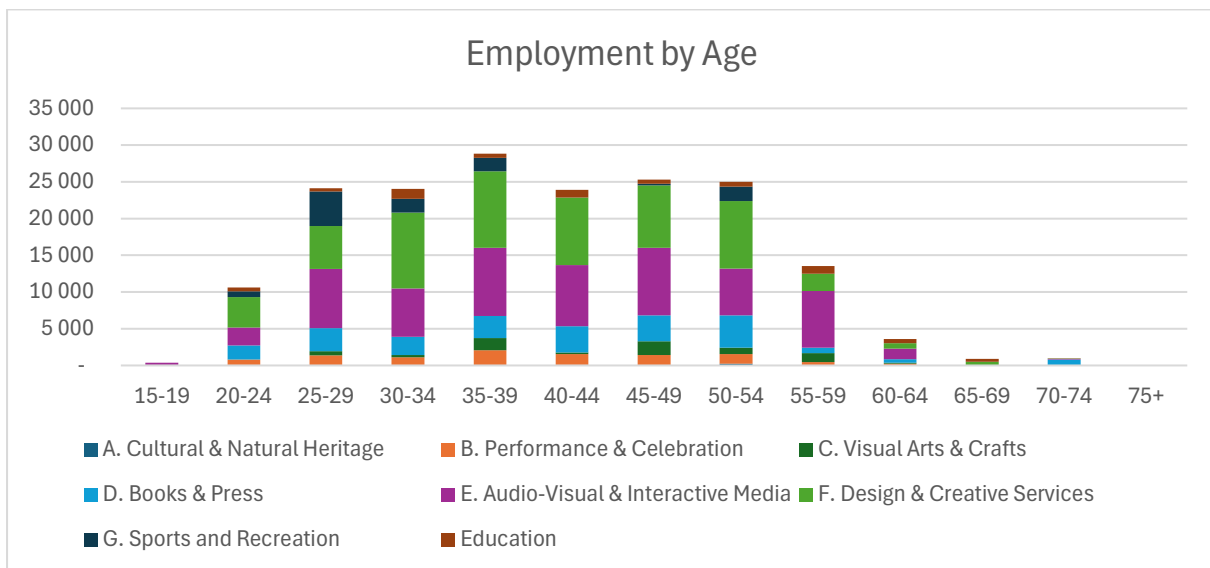
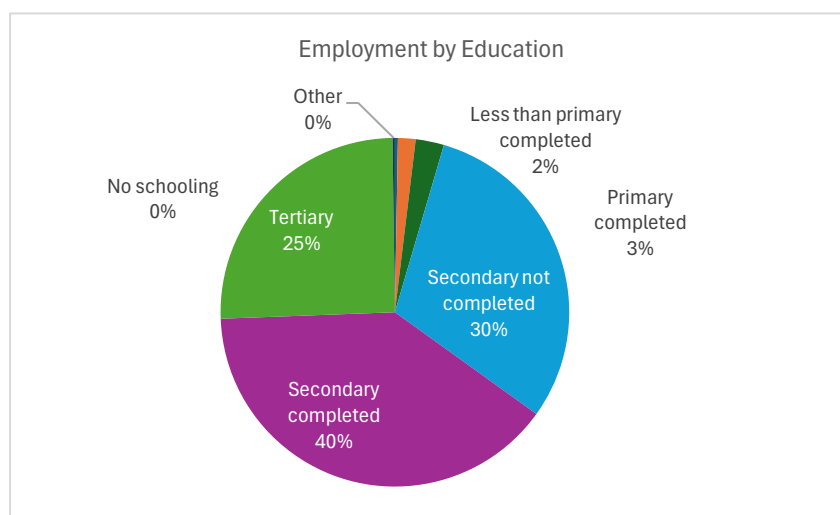


Figure 82: Western Cape's CCI&S Occupations by Age

With regards to employment by education, 25% of cultural and sports occupations in the Western Cape had tertiary education,



which is higher than the national average of 20%. An additional 40% had secondary education completed while 30% had not completed their secondary education, compared to the national average of 31%. Refer to [Appendix 1](#) for a breakdown of education occupations by domain.

Figure 83: Western Cape's CCI&S Occupations by Education

4.9.2.3. Contribution to Trade

Western Cape exported cultural and sports goods worth R4.99 billion in 2021. This makes Western Cape the largest exporter of CCI&S nationally. The key cultural exports from Western Cape are in the Visual Arts and Crafts and Culture and Natural Heritage domains. Western Cape's CCI&S exports represent 3.03% of total exports in the Western Cape. The table below presents Western Cape's exports in cultural goods per domain.

Table 27: Western Cape's exports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	2712	1392	2355	1,768.01
Performance and Celebration	445	423	332	432.32
Visual Arts and Crafts	1501	2001	2146	2,170.98
Books and Press	364	309	225	380.64
Audio-visual and Interactive Media	-	-	-	-
Design and Creative Services	1	-	-	-
Sports and Recreation	-	-	-	240
CCI&S Exports	5023	4125	5058	4,992.05
Total Exports	129,445	127,930	139,251	164,972
CCI&S Share of Exports	3.88%	3.22%	3.63%	3.03%

Source: Quantec, SARS

The cultural and sports imports in the Western Cape were R3.5 billion in 2021. CCI&S imports were mainly driven by the Sports and Recreation, Books and Press and Visual Arts and Crafts domains. The CCI&S in the Western Cape accounts for 1.50% of total exports in 2021, up from 0.66% mainly due to the imports of sporting goods. The table below presents Western Cape's imports of cultural and sports goods by domain.

Table 28: Western Cape's imports by domain, R millions

Domain	2018	2019	2020	2021
Cultural and Natural Heritage	120	74	82	148
Performance and Celebration	412	409	354	396
Visual Arts and Crafts	555	622	454	527
Books and Press	449	461	384	656
Audio-visual and Interactive Media	-	-	-	0
Design and Creative Services	-	-	-	0
Sports and Recreation	-	-	-	1783
CCI&S Imports	1,536	1566	1,274	3,509.75
Total Imports	218,402	227,921	194,056	233,277
CCI&S Share of Imports	0.70%	0.69%	0.66%	1.50%

Source: Quantec, SARS

The Western Cape's CCI&S Balance of Trade has been positive over the period 2018 to 2021. The graph below illustrates the Balance of Trade movement of international trade of cultural goods in the Western Cape.

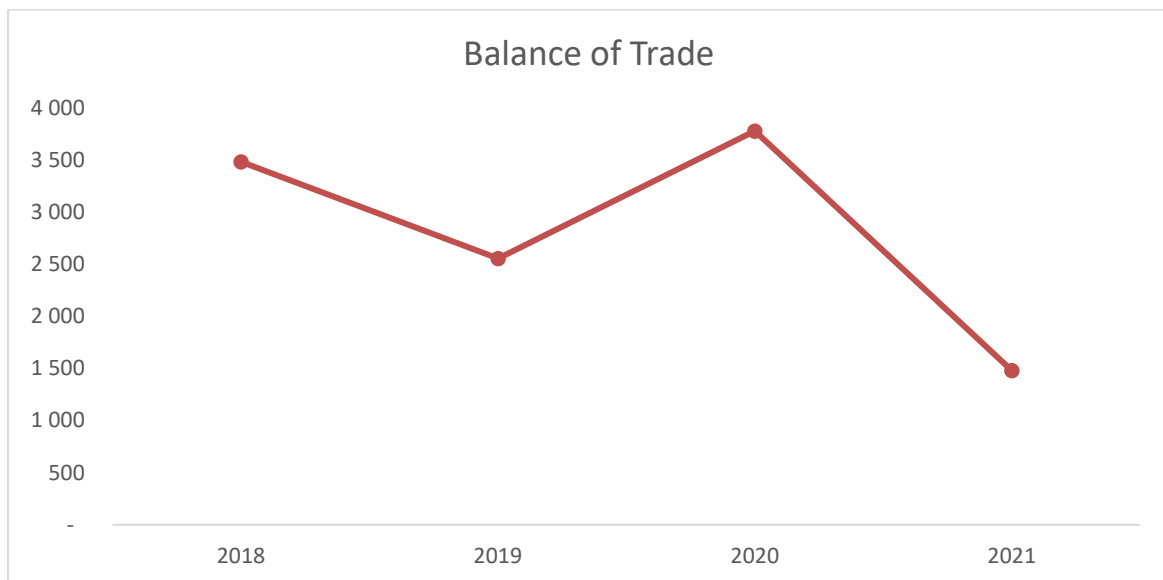


Figure 84: Western Cape's CCI&S Balance of Trade

4.9.2.4. Contribution to Tax Revenue

The contribution of the CCI&S to Tax Revenue represents a major part of the positive impact it makes within the economy. The industry's contribution to public finances is both direct and indirect, through a wide range of taxes. During 2021, the CCI&S in the Western Cape economy increased total government revenue by an estimated R46.6 billion. This figure constitutes direct and indirect tax revenue, as well as the broader fiscal impacts generated through the linkages the CCI&S industry has with other economic sectors. The contribution to public finance by domain demonstrates that the Audio-Visual and Interactive Media and Design and Creative Services domains collectively account for over 50% of tax revenue generated by the CCI&S in the Western Cape.

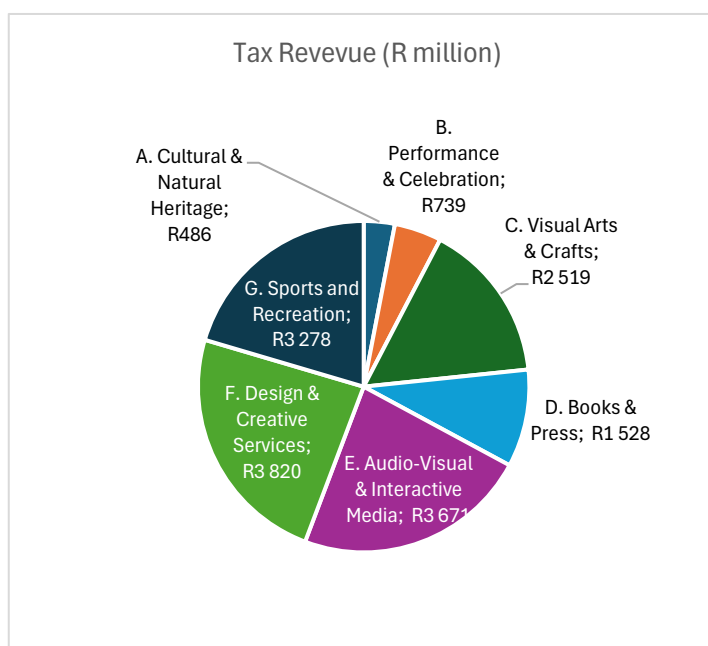


Figure 85: Western Cape's CCI&S Tax Revenue Contribution by Domain

4.9.2.5. Contribution to Poverty Reduction

The CCI&S contributes towards poverty alleviation through its impact on the economic viability of low-income households. The industry generates additional income for low-income households, especially through the activation of downward streams of income sources. The total income received by households in the Western Cape was nearly R37.4 billion in 2021, an estimated R3.6 billion of which flowed to lower income households. Noteworthy observation is that while the Western Cape plays a prominent role in the industry, it contributes less towards generating income for low-income households, and ranks 5th in this aspect after Gauteng, KZN, Eastern cape and Limpopo. The distribution of income flowing to low-income households by domain is illustrated in the figure below.

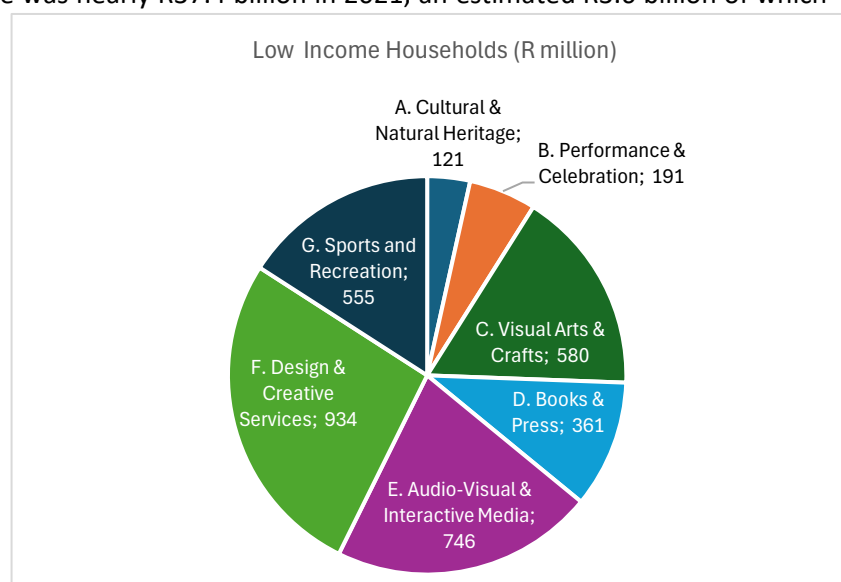


Figure 86: Western Cape's CCI&S Domain Contribution to Low Income Household

5 Conclusion

This section summarises the contribution of the nine provinces to the creative and sports industry.

The analysis shows the role played by provinces in relation to the creative and sports industry. The analysis highlights that Gauteng remains a dominant region, contributing 43% to the CCI&S GDP. The Western Cape and KwaZulu Natal also contribute a significant share to CCI&S (17% and 16% respectively).

Gauteng is also the largest contributor to employment, followed by Western cape and KZN. What is also evident in terms of employment in the industry is that cultural and sports workers in these three provinces tend to have secondary and tertiary qualifications.

With regards to trade, Western Cape has the largest proportion of cultural and sports exports, while Gauteng has the largest share of CCI&S imports.

Table 29: Summary of provincial CCI&S contributions in 2021

Province	GDP (RM)	Number of jobs	Tax Revenue (RM)	Low Income Household (RM)	Exports (RM)	Imports (RM)
Gauteng	107,770	411,364	46,594	14,484	3,721	8,643
Western Cape	41,687	181,133	17,621	3,859	4,992	3,510
KwaZulu-Natal	40,194	169,199	17,059	8,764	1,317	1,621
Eastern Cape	17,817	64,866	6,733	4,450	145	148
Limpopo	13,832	64,262	5,595	3,935	67	25
Mpumalanga	9,423	63,039	3,657	1,850	91	36
Free State	9,431	44,677	3,647	1,693	54	25
North West	7,712	43,880	2,898	1,671	65	22
Northern Cape	2,796	11,126	1,014	595	3	2

In addition to GDP, trade and employment, the evaluation shows the importance of the industry in terms of reducing poverty. This is measured through the income generated by the industry that accrues to low-income households. It is interesting that while the industry in Western Cape contributes to low-income households, the value is relatively lower compared to other variable and lands the province in the fifth spot. Further, the industry contributes to public finances through a wide range of taxes. Thereby increasing government revenue.

On the domain basis, the Design and Creative Services, followed by Sports and Recreation, were the main contributors to the provinces' performance on terms of GDP, employment and trade, poverty reduction and tax revenue.

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7 Appendix 1: Provincial Employment

7.1. Provincial Cultural and Sports Employment by Gender

	Western Cape		Eastern Cape		Northern Cape		Free State		KwaZulu-Natal		North West		Gauteng		Mpumalanga		Limpopo		Total		Grand Total
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Total
A. Cultural & Natural Heritage	-	411	-	124	182	143	137	152	257	673	32	-	641	1,614	68	54	973	377	2,291	3,548	5,839
B. Performance & Celebration	5,237	4,961	3,012	1,513	540	228	884	1,265	6,755	4,138	930	1,023	14,415	11,190	1,125	2,683	1,350	1,333	34,249	28,333	62,582
C. Visual Arts & Crafts	3,865	2,973	2,085	228	58	-	394	301	3,591	891	-	-	7,899	4,350	573	386	187	10	18,652	9,140	27,792
D. Books & Press	10,758	13,352	2,572	3,839	1,636	670	2,250	3,258	12,972	9,735	3,437	2,438	30,724	31,241	3,118	4,961	7,436	3,674	74,902	73,168	148,069
E. Audio-Visual & Interactive Media	28,383	31,398	10,870	14,272	1,798	1,116	7,648	11,867	32,213	27,195	6,975	7,463	88,228	73,965	9,821	15,108	11,791	14,841	197,727	197,225	394,952
F. Design & Creative Services	34,097	27,164	14,645	7,736	2,550	1,536	6,843	5,602	36,199	17,659	7,616	8,039	70,937	40,732	12,578	7,458	11,221	7,320	196,685	123,246	319,931
G. Sports and Recreation	5,856	5,585	2,271	992	428	-	3,467	365	5,806	7,546	1,268	3,716	9,225	10,456	1,170	514	-	2,713	29,491	31,886	61,377
Education	4,937	2,158	564	145	241	-	229	17	2,954	616	724	218	11,217	4,531	2,860	560	746	290	24,472	8,533	33,005
Total	93,133	88,001	36,018	28,848	7,434	3,693	21,851	22,826	100,747	68,452	20,983	22,897	233,287	178,078	31,314	31,725	33,704	30,558	578,469	475,079	1,053,547

7.2. Provincial Employment by Race

	Western Cape				Eastern Cape				Northern Cape				Free State				KwaZulu-Natal			
	African/ Black	Coloured	Indian/ Asian	White	African/ Black	Coloured	Indian/ Asian	White	African/ Black	Coloured	Indian/ Asian	White	African/ Black	Coloured	Indian/ Asian	White	African/ Black	Coloured	Indian/ Asian	White
A. Cultural & Natural Heritage	-	132	-	278	57	67	-	-	-	325	-	-	289	-	-	-	614	-	62	254
B. Performance & Celebration	3,220	5,188	43	1,746	2,452	1,791	-	281	454	204	-	111	1,809	48	-	291	8,242	58	2,091	502
C. Visual Arts & Crafts	2,193	1,038	-	3,608	1,320	993	-	-	-	58	-	-	618	-	-	77	4,373	-	87	23
D. Books & Press	5,332	13,011	91	5,761	3,393	1,490	-	1,545	1,174	902	-	235	4,473	101	-	956	13,293	122	5,404	3,716
E. Audio-Visual & Interactive Media	19,381	16,997	149	23,254	20,618	3,203	713	608	1,425	1,148	-	342	16,014	106	282	3,113	51,940	228	6,006	1,235
F. Design & Creative Services	28,169	18,994	1,322	12,775	19,486	2,200	-	695	2,265	1,662	-	159	11,863	502	17	63	48,869	580	3,730	678
G. Sports and Recreation	5,069	5,362	-	1,010	1,622	-	-	1,640	-	428	-	-	3,098	-	-	733	9,655	-	3,066	631
Education	321	2,978	395	3,401	238	174	-	297	105	110	-	25	229	-	17	-	1,076	88	976	1,429
Total	63,686	63,700	1,999	51,833	49,186	9,918	713	5,067	5,423	4,837	0	872	38,393	756	316	5,234	138,062	1,076	21,422	8,468

	North West				Gauteng				Mpumalanga				Limpopo				Total			Grand Total	
	African /Black	Colour ed	Indian/ Asian	White	African /Black	Colour ed	Indian/ Asian	White	African /Black	Colour ed	Indian/ Asian	White	African /Black	Colour ed	Indian/ Asian	White	African/B lack	Colour ed	Indian /Asian	White	Total
A. Cultural & Natural Heritage	32	-	-	-	1,816	-	-	440	122	-	-	-	1,350	-	-	-	4,281	524	62	972	5,839
B. Performance & Celebration	1,431	19	170	333	17,659	710	1,770	5,466	2,952	-	163	694	2,277	-	328	77	40,497	8,017	4,566	9,503	62,582
C. Visual Arts & Crafts	-	-	-	-	6,595	291	66	5,296	960	-	-	-	197	-	-	-	16,255	2,379	153	9,004	27,792
D. Books & Press	4,777	39	378	702	39,415	4,078	3,754	14,681	6,295	-	344	1,467	7,897	-	2,392	849	86,049	19,743	12,364	29,913	148,069
E. Audio-Visual & Interactive Media	13,072	41	567	758	104,982	3,688	4,953	48,569	23,015	-	360	1,554	25,296	-	1,123	214	275,743	25,411	14,152	79,645	394,952
F. Design & Creative Services	13,076	95	-	2,484	100,762	1,303	660	8,943	18,996	31	-	1,009	18,211	-	-	330	261,699	25,367	5,729	27,136	319,931
G. Sports and Recreation	4,984	-	-	-	15,005	-	567	4,109	1,685	-	-	-	2,713	-	-	-	43,830	5,790	3,633	8,124	61,377
Education	633	109	-	200	6,318	273	494	8,662	1,994	-	-	1,427	989	-	-	46	11,903	3,733	1,882	15,487	33,005
Total	38,006	304	1,116	4,477	292,553	10,342	12,266	96,167	56,019	31	867	6,149	58,930	0	3,843	1,516	740,258	90,965	42,541	179,783	1,053,547

7.3. Provincial Employment by Age

	Western Cape												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	72	-	-	-	58	-	259	21	-	-	-	-
B. Performance & Celebration	23	720	1,360	1,120	2,081	1,478	1,400	1,276	458	238	-	42	-
C. Visual Arts & Crafts	-	-	603	298	1,640	211	1,892	880	1,197	117	-	-	-
D. Books & Press	48	1,924	3,118	2,463	3,022	3,577	3,541	4,415	743	499	-	760	-
E. Audio-Visual & Interactive Media	288	2,469	8,065	6,588	9,259	8,320	9,203	6,349	7,704	1,442	-	93	-
F. Design & Creative Services	-	4,115	5,850	10,329	10,448	9,226	8,494	9,193	2,379	730	497	1	-
G. Sports and Recreation	-	795	4,712	1,910	1,817	-	215	1,991	-	-	-	-	-
Education	-	522	429	1,315	547	1,039	551	628	1,025	575	411	52	-
Total	359	10,616	24,138	24,023	28,814	23,911	25,296	24,992	13,526	3,601	908	948	-

	Eastern Cape												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	29	37	-	-	20	38	-	-	-	-	-
B. Performance & Celebration	17	427	533	388	996	1,634	243	251	11	13	13	-	-
C. Visual Arts & Crafts	-	151	-	72	875	1,164	-	41	10	-	-	-	-
D. Books & Press	36	498	1,779	934	832	374	870	580	454	27	26	-	-
E. Audio-Visual & Interactive Media	136	1,201	3,334	3,723	5,651	3,128	2,855	2,811	1,730	255	195	122	-
F. Design & Creative Services	216	966	3,170	3,609	3,904	3,633	2,685	2,763	998	436	-	-	-
G. Sports and Recreation	-	332	1,640	875	415	-	-	-	-	-	-	-	-
Education	-	-	-	209	74	74	123	156	73	-	-	-	-
Total	406	3,575	10,486	9,848	12,747	10,007	6,796	6,640	3,274	730	235	122	-

	Northern Cape												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	57	15	54	29	69	70	-	15	-	17	-	-
B. Performance & Celebration	-	15	286	227	59	-	108	-	15	-	-	57	-
C. Visual Arts & Crafts	-	-	58	-	-	-	-	-	-	-	-	-	-
D. Books & Press	-	31	624	562	430	119	338	-	54	-	27	120	-
E. Audio-Visual & Interactive Media	-	98	1,016	636	270	290	333	-	48	94	4	126	-
F. Design & Creative Services	169	222	731	453	958	287	617	546	-	54	-	50	-
G. Sports and Recreation	-	201	-	227	-	-	-	-	-	-	-	-	-
Education	-	-	66	-	44	25	105	-	-	-	-	-	-
Total	169	624	2,797	2,159	1,791	790	1,571	546	131	148	48	354	-

	Free State												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	24	113	88	-	-	64	-	-	-	-	-
B. Performance & Celebration	-	142	282	589	404	235	344	129	-	25	-	-	-
C. Visual Arts & Crafts	-	121	107	77	269	-	-	120	-	-	-	-	-
D. Books & Press	-	295	680	1,929	637	577	848	489	-	54	-	-	-
E. Audio-Visual & Interactive Media	109	1,372	1,974	5,623	3,229	1,633	2,109	1,850	756	547	174	63	78
F. Design & Creative Services	-	256	777	2,558	2,617	1,882	1,090	951	1,807	489	-	17	-
G. Sports and Recreation	-	-	652	1,357	547	541	365	369	-	-	-	-	-
Education	-	-	67	37	32	-	38	36	18	-	-	17	-
Total	109	2,185	4,564	12,283	7,824	4,869	4,793	4,007	2,580	1,116	174	97	78

KwaZulu Natal													
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	205	143	30	-	219	148	50	68	-	-	68
B. Performance & Celebration	34	2,234	1,615	1,667	960	1,442	712	600	1,234	165	229	-	-
C. Visual Arts & Crafts	-	1,904	458	869	283	-	-	6	962	-	-	-	-
D. Books & Press	71	899	3,276	3,151	2,260	4,365	2,683	2,393	1,577	1,255	482	188	108
E. Audio-Visual & Interactive Media	156	5,270	8,384	14,045	7,508	6,321	6,895	4,055	4,705	1,301	721	32	15
F. Design & Creative Services	74	1,647	8,248	9,276	10,896	9,946	7,016	4,196	1,604	851	104	-	-
G. Sports and Recreation	-	195	2,502	2,693	1,793	5,806	-	363	-	-	-	-	-
Education	-	345	223	605	1,433	80	122	134	489	107	32	-	-
Total	334	12,493	24,911	32,449	25,163	27,960	17,646	11,895	10,621	3,747	1,569	219	191

	North-West												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	32	-	-	-	-	-	-	-	-	-	-
B. Performance & Celebration	36	265	244	192	292	418	256	29	48	173	-	-	-
C. Visual Arts & Crafts	-	-	-	-	-	-	-	-	-	-	-	-	-
D. Books & Press	76	558	548	388	746	880	1,961	61	224	434	-	-	-
E. Audio-Visual & Interactive Media	261	870	1,184	1,776	2,822	1,978	2,880	975	1,309	383	-	-	-
F. Design & Creative Services	-	328	3,449	1,074	2,486	3,406	2,483	1,814	489	125	-	-	-
G. Sports and Recreation	-	-	1,830	1,886	1,268	-	-	-	-	-	-	-	-
Education	-	-	105	237	71	120	73	-	336	-	-	-	-
Total	374	2,021	7,392	5,552	7,685	6,802	7,653	2,880	2,406	1,116	-	-	-

	Gauteng												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	156	-	645	70	207	1,074	103	-	-	-	-
B. Performance & Celebration	-	1,337	4,604	5,557	4,732	3,147	3,389	1,082	987	574	144	51	-
C. Visual Arts & Crafts	-	637	1,675	3,810	989	1,368	1,137	1,323	1,151	158	-	-	-
D. Books & Press	-	4,480	9,854	11,406	11,381	5,964	7,444	3,779	4,420	1,543	948	745	-
E. Audio-Visual & Interactive Media	74	8,870	20,980	35,596	24,516	21,805	18,602	15,887	12,104	2,354	677	729	-
F. Design & Creative Services	107	3,834	12,926	17,605	20,569	21,914	17,495	7,415	6,510	1,598	942	556	197
G. Sports and Recreation	-	1,390	5,660	5,580	1,519	3,344	871	538	779	-	-	-	-
Education	-	144	1,845	1,877	4,877	1,615	2,074	1,399	1,049	439	120	-	307
Total	180	20,692	57,701	81,430	69,228	59,227	51,219	32,499	27,105	6,666	2,831	2,081	505

	Mpumalanga												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	156	-	645	70	207	1,074	103	-	-	-	-
B. Performance & Celebration	-	1,337	4,604	5,557	4,732	3,147	3,389	1,082	987	574	144	51	-
C. Visual Arts & Crafts	-	637	1,675	3,810	989	1,368	1,137	1,323	1,151	158	-	-	-
D. Books & Press	-	4,480	9,854	11,406	11,381	5,964	7,444	3,779	4,420	1,543	948	745	-
E. Audio-Visual & Interactive Media	74	8,870	20,980	35,596	24,516	21,805	18,602	15,887	12,104	2,354	677	729	-
F. Design & Creative Services	107	3,834	12,926	17,605	20,569	21,914	17,495	7,415	6,510	1,598	942	556	197
G. Sports and Recreation	-	1,390	5,660	5,580	1,519	3,344	871	538	779	-	-	-	-
Education	-	144	1,845	1,877	4,877	1,615	2,074	1,399	1,049	439	120	-	307
Total	180	20,692	57,701	81,430	69,228	59,227	51,219	32,499	27,105	6,666	2,831	2,081	505

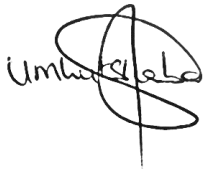
	Limpopo												
	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75+
A. Cultural & Natural Heritage	-	-	194	127	411	32	54	478	54	-	-	-	-
B. Performance & Celebration	-	159	724	632	138	367	317	134	194	-	17	-	-
C. Visual Arts & Crafts	-	187	10	-	-	-	-	-	-	-	-	-	-
D. Books & Press	-	330	1,817	1,708	936	825	2,590	1,189	995	685	37	-	-
E. Audio-Visual & Interactive Media	129	2,297	3,312	3,136	3,158	3,832	2,994	3,221	3,470	828	255	-	-
F. Design & Creative Services	-	155	2,047	4,816	2,282	3,669	2,334	1,772	1,099	226	142	-	-
G. Sports and Recreation	-	-	1,545	670	199	-	298	-	-	-	-	-	-
Education	-	-	-	476	484	-	-	-	30	46	-	-	-
Total	129	3,127	9,649	11,565	7,608	8,725	8,587	6,794	5,841	1,785	451	-	-

7.4. Provincial Employment by Education

	Western Cape							Eastern Cape							Northern Cape							Free State							KwaZulu-Natal						
	No sch ool ing	Les s tha n pri ma ry co mpl ete d	Pri ma ry co mpl ete d	Sec ond ary not co mpl ete d	Sec ond ary co mpl ete d	Tert iary	Oth er	No sch ool ing	Les s tha n pri ma ry co mpl ete d	Pri ma ry co mpl ete d	Sec ond ary not co mpl ete d	Sec ond ary co mpl ete d	Tert iary	Oth er	No sch ool ing	Les s tha n pri ma ry co mpl ete d	Pri ma ry co mpl ete d	Sec ond ary not co mpl ete d	Sec ond ary co mpl ete d	Tert iary	Oth er	No sch ool ing	Les s tha n pri ma ry co mpl ete d	Pri ma ry co mpl ete d	Sec ond ary not co mpl ete d	Sec ond ary co mpl ete d	Tert iary	Oth er	No sch ool ing	Les s tha n pri ma ry co mpl ete d	Pri ma ry co mpl ete d	Sec ond ary not co mpl ete d	Sec ond ary co mpl ete d	Tert iary	Oth er
A. Cultural & Natural Heritage	-	0	0	116	132	0	-	-	-	38	-	29.29	115	-	-	-	0	45.38	129	58	0	-	24.15	-	0	96	14.1	0	12.2	157	0	145	445	257	0
B. Performance & Celebration	0	120	305	2,889	3,776	2,201	0	0	176	0	1,947	1,624	314	0	0	0	0	268	379	138	0	0	2	0	735	1,218	25.1	0	0	744	32	3,451	7,388	746	0
C. Visual Arts & Crafts	0	96	0	1,264	2,729	2,329	0	0	128	0	1,434	326	6	0	0	0	0	106	0	0	0	0	0	0	193	331	27.0	0	0	397	0	1,984	2,915	62	0
D. Books & Press	0	1	715	5,568	10,109	7,834	0	25.9	32	59	1,109	3,796	1,015	0	0	0	0	649	1,202	41.7	0	0	0	0	1,372	2,788	1,931	0	0	847	208	3,568	14,189	4,446	0
E. Audio-Visual & Interactive Media	19	1,730	1,684	12,710	26,827	17,821	14.3	73.9	923	1,125	12,032	8,130	1,683	25.5	0	13	0	1,295	1,817	34.6	0	15.6	1,255	1,253	6,568	7,127	4,708	15.4	65.6	4,790	1,325	21,120	28,200	3,444	99
F. Design & Creative Services	486	933	1,577	27,254	20,762	9,945	24.4	0	684	284	11,547	8,775	1,712	0	0	196	252	1,751	2,063	41.4	13.6	33	182	383	7,695	3,737	46.1	53.2	1,389	1,090	21,096	25,295	3,771	68	
G. Sports and Recreation	0	0	469	4,367	4,784	1,527	0	0	0	0	0	937	677	0	0	0	0	0	201	0	0	0	539	0	1,123	255	1,281	0	0	779	0	935	6,046	5,488	0
Education	-	81	-	798	2,325	4,265	-	-	-	37	-	292	378	-	-	115	-	112	28	-	-	-	-	18	36	-	-	-	-	69	57	195	844	2,049	-
Total	505	2,962	4,750	54,966	71,444	45,921	38.7	99.8	1,942	1,543	28,069	23,911	5,899	25.5	0	323	252	4,120	5,925	1,373	13.6	18.9	2,002	1,654	17,723	15,553	9,043	15.4	1,310	9,171	2,711	52,494	85,322	20,263	16.7

	North West							Gauteng							Mpumalanga							Limpopo				
	No scho ling	Less than prim ary com plete d	Prim ary com plete d	Seco ndary not com pleted	Seco ndary com pleted	Tertia ry	Othe r	No scho ling	Less than prim ary com pleted	Prim ary com pleted	Seco ndary not com pleted	Seco ndary com pleted	Tertia ry	Othe r	No scho ling	Less than prim ary com pleted	Prim ary com pleted	Seco ndary not com pleted	Seco ndary com pleted	Tertia ry	Othe r	No scho ling	Less than prim ary com pleted	Prim ary com pleted	Seco ndary not com pleted	Seco ndary com pleted
A. Cultural & Natural Heritage	0	0	0	0	32	0	0	49	0	0	215	1,430	706	0	0	0	0	0	40	51	0	242	54	0	115	274
B. Performance & Celebration	0	187	0	413	895	296	0	120	187	63	6,546	14,446	4,452	98	0	0	0	845	1,996	854	0	0	54	29	632	1,217
C. Visual Arts & Crafts	0	0	0	0	0	0	0	0	0	0	1,545	4,099	6,561	0	0	0	0	518	372	0	0	0	0	0	0	127
D. Books & Press	0	533	0	968	2,103	2,180	0	264	412	371	14,386	30,538	15,182	426	0	0	123	762	4,564	2,342	0	380	565	62	3,539	4,167
E. Audio-Visual & Interactive Media	617	1,492	0	6,355	4,059	1,420	0	1,380	7,325	1,772	36,817	54,718	56,317	1,702	1,189	3,419	1,093	7,309	9,377	2,545	512	676	1,859	1,070	11,043	7,228
F. Design & Creative Services	0	759	397	5,485	8,313	1,099	0	1,116	1,613	1,764	43,039	47,571	13,929	853	230	750	539	10,897	6,578	1,252	0	298	142	0	9,358	5,640
G. Sports and Recreation	0	0	0	0	4,326	682	0	0	0	0	4,132	16,552	2,710	0	0	0	0	335	1,119	0	0	0	208	0	0	641
Education	-	-	-	271	372	68	-	-	-	-	2,656	6,591	6,673	-	-	-	80	1,005	2,102	324	-	-	-	-	262	189
Total	617	2,972	397	13,492	20,101	5,745	0	2,928	9,538	3,969	109,337	175,945	106,531	3,078	1,420	4,168	1,835	21,671	26,146	7,368	512	1,596	2,882	1,162	24,948	19,483

APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY - Chapter 2- Provincial profiles – 28 March 2024

	NAME	TITLE	SIGNATURE	DATE
Approved by:	Ms Unathi Lutshaba	SACO Executive Director		28 March 2024
Approved by:	Dr Mphikeleli Mnguni	DSAC, SACO Project Manager		
Approved by:	Dr Stella (CN) Khumalo	DSAC DDG: Arts, Culture Promotion and Development		