



south african
cultural observatory

MEASURING AND VALUING SOUTH AFRICA'S CULTURAL AND SPORT ECONOMY



Final Report

CCI&S Historical Context

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





South African Cultural Observatory

Economic Historical Context

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Executive Summary

This report examines the evolution of creative and cultural policy to better understand the creative economy. The Sport and Recreation has become an integral part of Creative and Cultural Industries, as such the report assesses the evolution of the sport and recreation policy. The analysis further investigates the contribution of the creative sector to GDP, employment and socio-demographics. From a GDP contribution perspective, the analysis demonstrates that CCI&S has significantly contributed to GDP, with the largest domains being the Audio-visual and Interactive Media, Design and Creative Services, as well as Sport and Recreation. While domains such as Cultural and Natural Heritage and Performance and Celebration recorded smaller contributions. The 2008/2009 global financial crisis, the COVID-19 pandemic and rapid digitization, have posed challenges to growth in the sector, while at times created opportunities for growth. Data on cultural occupations indicates a steady growth, with the Visual Arts and Crafts domain dominating employment. Accordingly, women are actively becoming an integral part of the sector. Moreover, the participation of the Black African, Coloured and India/Asia population groups is increasing, alongside improved youth employment. Furthermore, occupations by education levels reveal that there is a positive correlation between high education level and improved employment prospects. While, spatial distribution indicates that creative activities are clustered in Gauteng, KwaZulu- Natal and Western Cape, resulting in a concentration of cultural occupations, whereas in rural provinces such as Eastern Cape and Limpopo, a declining pattern is observed.

The analysis of cultural goods trade shows that the Visual Arts and Crafts and Books and Press domains drove cultural goods exports, with fluctuations caused by the COVID-19 pandemic and digital transitions. Despite, disruptions from the COVID-19 pandemic and digital transformation China, the UK and US remained South Africa's dominant cultural goods import partners. In addition, SACU countries, Namibia and Botswana remain key drivers of growth of South Africa's cultural trade, while the Middle Eastern, North African and Latin American countries are insignificant trading partners. Overall, the analysis highlights the resilience of CCI&S, its growth potential and contribution to South Africa's economy. It presents enhancing digitization and using AI tools to support local cultural production and strengthen regional trade partnerships to further grow the creative sector.

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List of Abbreviations and Acronyms

ACH	Arts, Culture and Heritage
AFS	Annual Financial Statistics
CAJ	Culture and Jobs
CCI	cultural and creative industries
CCI I-O	CCI Input Output
CIGS	Cultural Industries Growth Strategy
DSAC	Department of Sport, Arts and Culture
EU	European Union
FCS	Framework for Cultural Statistics
FTA	free trade area
GDP	Gross Domestic Product
GVA	Gross Value Added
HS	Harmonised System
ITC	International Trade Centre
LMDS	Labour Market Dynamics Survey
MGE	Mzansi's Golden Economy
NAC	National Arts Council
PALMS	Post-Apartheid Labour Market Series
SACO	South African Cultural Observatory
SACU	Southern African Customs Union
SADC	Southern African Development Community
SAM	Social Accounting Matrix
SARB	South African Reserve Bank
SIC	Standard Industrial Classification
SNA	System of National Accounts
Stats SA	Statistics South Africa
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
USMCA	US-Mexico-Canada

1. Introduction and Purpose

Understanding the creative economy involves analysing the emerging dynamics and trends that have shaped its development trajectory over time. Assessing patterns of development enables the identification and understanding of the impacts of changes in key components of the creative economy, such as cultural policy. Notably, the cultural policy landscape in South Africa has shifted from limiting the cultural policy to concepts of national identity, core creative practice, and public funding for the erection and maintenance of cultural infrastructure to embracing digital media and recognising the culture's dynamic intersection with economic markets (Maralack, 2021). This evolution is demonstrated through the introduction of comprehensive frameworks such as the 1996 White Paper on Arts, Culture and Heritage, and the Mzansi's Golden Economy programme. These frameworks provide guidance and emphasise the need to address and rectify the injustices of the apartheid era; promote the recognition of the cultural economic value; and link the CCI&S to economic development objectives such as employment creation and economic progression.

The longitudinal trend analysis also provides insight into shifts within the sector, such as the post-COVID-19 recovery, digital transformation, and the implications of the introduction of Artificial Intelligence (AI) tools on the sustainability of the creative economy. This report (Chapter 5) forms one part of the Cultural and Creative Industries Mapping Study (SACO, 2025). Other chapters that give more detail on the methods and data used, and a national picture of the creative economy in South Africa, are:

Chapter 1: Macroeconomic Impact Assessment

Chapter 2: Employment, Transformation and Ownership

Chapter 3: International Trade in Cultural Goods and Services

Chapter 4: Spatial Distribution - Provincial and Metro Assessment

Chapter 5: Economic Historical Context

This chapter aims to provide:

- A historical analysis of the contribution of the CCI&S to South Africa's GDP.
- A comparison of the growth rate of the CCI&S over time, considering the economic performance of South Africa.
- A historical analysis of the contribution of the CCI&S to job creation in South Africa.
- An analysis of the transformation (socio-demographic profile including race groups and gender) of those working in cultural occupations over time.
- An analysis of the growth rate and real wages by the CCI&S domain over time.
- An analysis of the proportion and composition of cultural goods trade.
- An analysis of the origin and destinations of cultural goods trade.
- Interpretation and analysis of the data as it pertains to existing and future policy.

The chapter begins with an overview of South African economic and cultural policy over time, followed by a description of the methods and data used. The main sections covering GDP contribution, employment and transformation, and international trade are then discussed. The report concludes with a summary of the main findings and the potential implications of the analysis.

2. The South African Economy and Cultural Policy

2.1. Creative and Cultural Policy

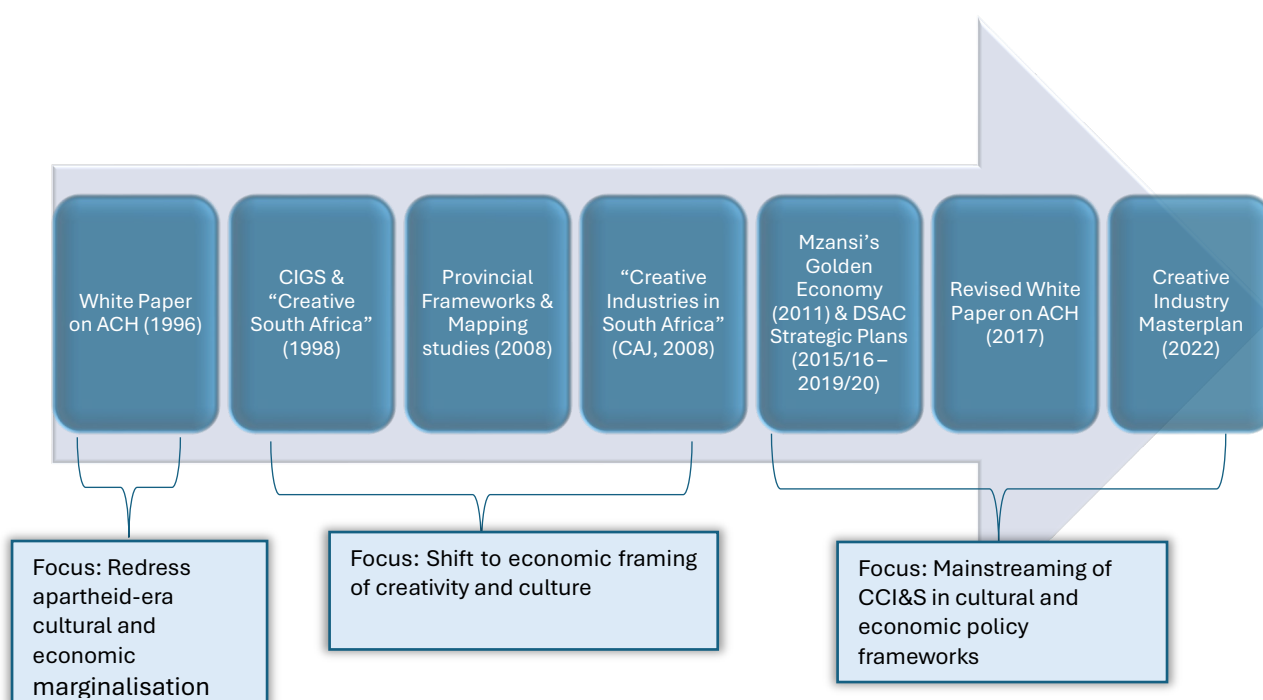
On an international scale, the creative economy has evolved in both economic output and job creation. As of 2024, Creative and Cultural Industries (CCI&S) contribute almost 3.1% to GDP, approximately \$2.25 trillion, and 6% to creating employment opportunities. The economic and employment outputs of CCI&S outperform those of traditional sectors, making it one of the fastest-growing sectors and a major contributor to economic growth (UNESCO, 2022). Though the COVID-19 pandemic significantly impacted the creative economy, it has emerged as a significant driver of global and regional economic development. The contribution of CCI&S is not only prominent in economic and employment growth but also in promoting socio-cultural identity, diversity, and social expression. In South Africa, cultural identity, social expression, and resistance are reflected in and encouraged by its creative and cultural industries. During apartheid, CCI&S contributed significantly towards political activism through storytelling, art and music. Iconic figures such as Miriam Makeba and Hugh Masekela used township theatre and protest art to shape cultural production and national consciousness, promoting the voices of those oppressed (DAC, 2011). Post-1994, the government began to recognise and appreciate the crucial role CCI&S plays in transforming and developing national cultural identity.

Consequently, the South African government introduced documents to guide and develop cultural policy. One of the first comprehensive frameworks introduced was the White Paper on Arts, Culture and Heritage in 1996. This White Paper aimed to address and rectify the injustices of the apartheid era, particularly the exclusion and marginalisation of Black, Coloured and Indian people from cultural expression, participation and access to economic resources. CCI&S continued to gain prominence as a driver of economic growth, and in 1998 the Cultural Industries Growth Strategy (CIGS) was introduced, marking significant recognition of the cultural economic value. The CIGS broadened the definition of CCI&S and incorporated sectors such as architecture, advertising, and design, with a focus on creativity. Ten years later, provincial governments, particularly Gauteng and the Western Cape, began conducting and releasing CCI mapping studies, further developing and shaping cultural policy at the regional level. In 2011, the Department of Arts and Culture introduced the Mzansi Golden Economy (MGE) programme. The aim was to link the CCI&S to economic development objectives such as employment creation and economic progression. In line with this programme, the 2013 revised White Paper was introduced with an emphasis on economic outcomes. However, it was later withdrawn due to criticism that it failed to incorporate social and cultural values, which are fundamental to the creative industry. After consultations and a socio-economic impact assessment by SACO, a revised White Paper was introduced in 2017. The White Paper recognised both the commercial and non-commercial values of arts, culture and heritage. In 2022, the Creative Industry Masterplan was developed to affirm the industry's role in addressing the three areas of concern in South Africa, particularly poverty, unemployment, and inequality (DSAC, 2025; SACO, 2020; DTIC, 2022).

The evolution of South Africa's cultural policy presents shifts and transformations in the sector, including redress post-apartheid, an economic framing from 1998 to 2008, and the

mainstreaming of CCI&S into broader economic frameworks. These structural shifts are presented in Figure 1 below.

Figure 1: South African cultural policy development post-apartheid to the present



Despite the guidance provided by the established policy documents and the success of CCI&S, the sector continues to face challenges. One of the key challenges is limited access to finance for microenterprises and freelancers, who dominate the sector's ecosystem (GIZ, 2024). In addition, lack of access to international markets has led to economic insecurity for creatives within the industry. These vulnerabilities have been exacerbated by the COVID-19 pandemic, resulting in risky and unstable contracts and income uncertainty, which ultimately undermine the long-term sustainability of the sector (Komorowski & Lewis, 2023). Furthermore, barriers to trade and insufficient international and public sector funding deter the industry from reaching its full potential. Moreover, the transition from traditional business models to digital platforms has led to digital exclusion and limited participation by creatives in rural and township areas. This transformation has raised uncertainties about fair remuneration, copyright breach and the exploitation of creatives. This rapid technological transformation has brought about the emergence of Artificial Intelligence (AI), which has significantly altered the method of creative content production, distribution and consumption. Though these digital advances offer new opportunities for income generation and innovation, they pose risks to employment within the sector and intellectual property protection (Jääskeläinen et al., 2022; SACO, 2024; Kofler et al., 2024).

Table 1 summarises key structural shifts in South African cultural policy, highlighting key achievements and economic signals of each policy document.

Table 1: Structural shifts of South African Cultural Policy

Policy Document	Period	Core Focus	Key Structural Shifts / Achievements	Economic Signal
White Paper on Arts, Culture and Heritage (1996)	Redress phase	Democratise culture; correct apartheid marginalisation	Cultural rights and access	Foundational phase; limited direct GDP impact; sector not yet economically framed
“Creative South Africa” & CIGS Framework (1998)	Early economic framing	Link creativity with growth	Introduction of creative industries as economic contributors	First recognition of sector’s potential for GDP and job creation
Provincial Frameworks & Mapping Studies (2008)	Evidence base	Build data and sector knowledge	Sector profiling and baseline data collection	Enabled future economic modelling and policy targeting
“Creative Industries in South Africa” (2008, CAJ)	Sectoral deepening	Identify growth domains	Emphasized key sub-sectors (e.g. music, film, design)	Sector seen as viable for targeted investment and employment growth
Mzansi’s Golden Economy (2011) & DSAC Strategic Plans (2015–2020)	Job creation focus	Culture as growth and jobs	Funding measures for festivals, touring, public art	Direct link to job creation; sector framed as contributor to GDP
Revised White Paper on Arts, Culture and Heritage (2017)	Aligning	Alignment with the agenda of culture development	Ensured that national development plans are aligned with culture	Sector positioned within broader economic and social frameworks
Creative Industry Masterplan (2022)	Integration	Tactical investment & competitiveness	Focus on industrialisation, export, and innovation	Sector projected to contribute significantly to GDP and employment

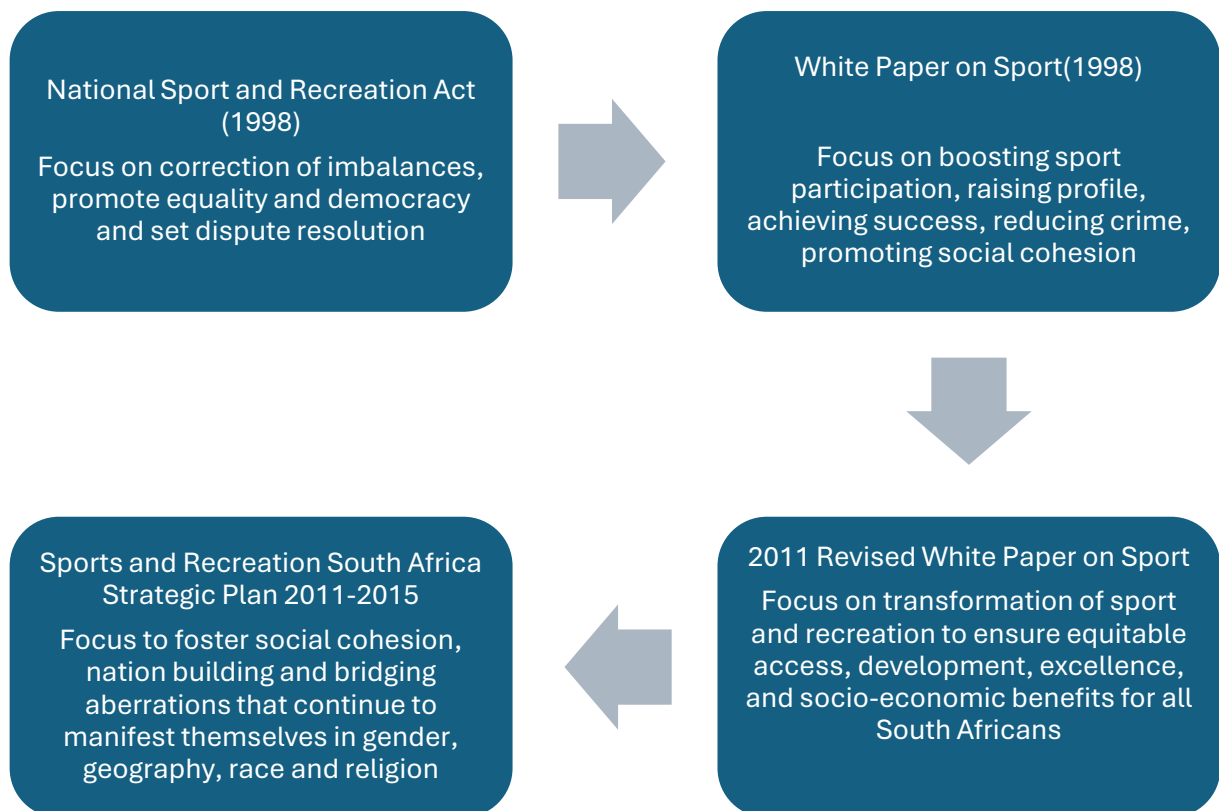
2.2. Sports and Recreation Policy

The racial discriminatory laws and practices which defined the apartheid era in South Africa adversely affected several sectors, such as education, health and housing; the sports and recreation sector did not escape these injustices (NSRP, 2012). Blacks (i.e. African, Indian and Coloured people) were denied equal access to competitive or recreational sports opportunities at school or community levels. Furthermore, there was little to no investment towards sports infrastructure, equipment, talent identification and development for previously disadvantaged population groups. Since then, the dawn of democracy has established a sports system free of discrimination and that would provide equal participation opportunities for all South Africans (NSRP, 2012). A free sports system was pursued through various acts, policies and strategic plans.

Accordingly, the National Sports and Recreation Act of 1998 was introduced to provide for the promotion and development of sport and recreation, and the coordination of relationships between the Sports Commission, national and recreation federations, and other agencies (NSRA, 1998). It aimed to correct imbalances in sport and recreation, promote equity and democracy in sport and recreation, and establish dispute-resolution mechanisms in sport and recreation. This was followed by the introduction of the 1998 White Paper, which emphasised transformation, addressing the legacy of unequal access, boosting participation, raising sport's profile, maximising success in significant events, and using sport to reduce crime and promote social cohesion (DSR, 1998).

However, poor performance and structural weaknesses contributed to reforms that led to the repeal of the South African Sports Commission Act in 2004 and the establishment of Sport and Recreation South Africa and the South African Sports Confederation and Olympic Committee (SASCOC) (DSR, 2011). The result was that the 1998 White Paper was outdated, necessitating its revision in 2011 and the development of a Road Map. The revised White Paper on Sports and Recreation aimed to achieve transformation of sport delivery and recreation by promoting equitable access, enhanced participation, and harnessing the socio-economic contributions that can create a better life for all South Africans (DSR, 2011). Furthermore, the introduction of the Sports and Recreation South Africa Strategic Plan 2011-2015 fostered social cohesion, nation-building, and bridged imbalances evident in gender, geography, race, and religion (Sports and Recreation SA, 2011). The focus is to increase access to sport and recreation activities for all South Africans, including those from disadvantaged communities.

Figure 2: South African Sport and Recreation policy development



The evolution of South Africa's sport and recreation policy presents shifts and transformation in the sector, covering redress and nation-building, correction of past imbalances, mass participation, sport as a development tool from 1998 to 2008. These structural shifts are presented in the table 2 below.

Table 2: Structural shifts of South African Sport and Recreation Policy

Policy Document	Core Focus	Key Structural Shifts / Achievements	Economic Signal
National Sport and Recreation Act (1998)	Redress & nation-building	Promoted equity, corrected imbalances, unified fragmented apartheid sports system	Contributed to GDP and created jobs
White Paper on Sport and Recreation (1998)	Unify fragmented apartheid sports system	Promoted mass participation, raised sport's profile, supported crime reduction	Supported growth in participation; laid foundation for increased GDP contribution and job creation in early 2000s
Revised White Paper on Sport and Recreation (2011)	Aligning national goals of development with those of sport	Emphasized the role of sport as a right and development tool	Strengthened sport's role in development; contributed to sustained sector growth
Sports and Recreation South Africa Strategic Plan 2011-2015	Transformation & access	Developed National Sport and Recreation Plan; hosted National Indaba; focused on mass participation and international success	Reinforced sport's economic role; supported employment through school sport, youth camps, and infrastructure development; sector continued contributing to GDP

3. Impact of Technology and AI on South Africa's CCI&S

The Fourth Industrial Revolution (4IR) has introduced opportunities and challenges that have significantly transformed the South African creative industry. Technological developments, namely blockchain, artificial intelligence (AI), Virtual and Augmented Reality (VR/AR), have led to the redefinition of how creative content is created, distributed and consumed. As a result of this transformation, creatives in the industry generate revenue through AI-generated art, non-fungible tokens (NFTs), and online exhibitions. These tools offer secure, transparent mechanisms. For example, through the adoption of blockchain technology, artists can sell their artwork directly to consumers, resulting in greater control and profit over their creative content. For example, music production, graphic design, and film editing have significantly adopted AI tools to enhance creative output. The use of AI tools in the creative industries has led to improved content creation, information extraction, data compression, and analysis. Creative content production has become relatively affordable, which lowers entry barriers and allows creatives to be innovative and reach a wider audience, which improves their revenue generation streams (SACO,2024).

However, concerns have been raised about the use of digital technologies such as NTFs and AI. These include the need for rigorous scrutiny of digital ownership, intellectual property, and ethical considerations related to AI-generated art. Moreover, traditional roles such as illustrators, sound engineers and stage technicians are at risk of being displaced due to the significant adoption of automation and generative technology. According to SACO (2020), 4IR tools benefit only those who are digitally literate, which is a minority in South Africa. Moreover, creatives from rural areas who were already enduring inequality within the sector are extremely digitally excluded due to a lack of internet connectivity and specialised training. Digital exclusion has limited the participation and innovation capacity of sidelined artists. Investing in the digital upskilling of creatives, infrastructure and creative policy reform is essential to harnessing the full potential of 4IR within the creative and cultural sector. Furthermore, creative industries face challenges which raise questions on the nature and purpose of creativity itself. In the creative sphere, questions about authorship, originality, cultural impact, and even job displacement loom large, prompting artists, audiences, and society more broadly to question the boundaries and responsibilities of creatives utilising AI (Jääskeläinen et al., 2022; SACO,2024).

Furthermore, the rapid transition towards AI has created vulnerabilities for creatives within CCI&S. These include the threat of being replaced by generative AI tools, a lack of transparency regarding compensation, and concerns about the rights and ethical use of their creative work. AI presents challenges to the sustainability of CCI&S, and the key components that affect the sustainability of the sector are discussed in detail below:

3.1. Social Sustainability

The use of AI has automated tasks traditionally performed by creatives and creators in CCI&S, threatening their employment if proper regulations are not put in place. It also deepens the existing socio-economic inequality in South Africa, as only a limited number of creatives can access and benefit from AI technologies, leaving those who are digitally excluded vulnerable

to unemployment. Furthermore, tasks such as writing, composing, designing, and editing have become increasingly automated by AI tools, leading to role redundancy for creatives such as musicians, writers, and music and film producers. The transformation of cultural production has reduced originality, human interaction, and creativity, and has created an urgency for creatives to adopt and evolve how they create and distribute content. Without reskilling and an inclusive digital transition, the social sustainability in CCI&S is threatened in South Africa (SACO,2024).

3.2. Economic Sustainability

AI has changed how creative content is produced, distributed and commercialised. Due to the heavy reliance on computing infrastructure, established tech platforms may further monopolise creative content, further excluding emerging creatives. AI generative tools outperform humans due to their cost-effectiveness and speed, undermining income generation and creative authenticity. The automation of creative work has disrupted traditional revenue streams in the sector. Furthermore, AI threatens to exacerbate income inequality in South Africa, particularly if proper policy interventions are not in place to regulate economic gains. In addition, if left unregulated, AI undermines the financial rights of creatives and compensation for innovation (Jääskeläinen et al., 2022).

3.3. Ethical Sustainability

According to SACO (2024), the use of AI has raised concerns about intellectual property protection, consent, and ownership. Legal and moral concerns have emerged in the creative sector due to the lack of clarity regarding content ownership and the use of AI tools. Often, creatives are unaware that their work is being used and sold. Moreover, the rapid transition towards AI poses threats to the integrity of the creative economy, including cultural and artistic content, as well as to the human rights of creatives within the sector.

3.4. Cultural Sustainability

African identities, namely languages, traditions and cultural narratives, are often neglected by AI-generative tools. This results in creative content that often reflects Western cultural beliefs and values, undermining the uniqueness of African cultural diversity. South Africa's pride in the sector stems from its unique historical and ethnic identities, which are at risk of being diluted by the development and use of AI. Maintaining cultural sustainability in CCI&S necessitates incorporating local content and knowledge systems into the development and governing of AI tools (Jääskeläinen et al., 2022).

3.5. Environmental Sustainability

The environmental impact of AI on CCI&S is mainly driven by the widespread use of energy-intensive training methods and the associated computing infrastructure. These processes significantly increase carbon emissions, which undermine global efforts to reduce carbon footprints, reinforcing the need to adopt green energy and energy-efficient AI systems. Thus, the lack of clean energy AI usage continues to threaten global sustainability goals (Jääskeläinen et al., 2022).

Achieving sustainable development in AI within CCI&S requires forward-looking policy initiatives. Such policies must establish mechanisms to regulate the AI systems and their application in the creative sector. Furthermore, they must enforce strict copyright protections and ensure fair compensation for creatives in the industry. While effective environmental policy interventions to promote sustainability must prioritise investments in green AI infrastructure to reduce carbon emissions and align with South Africa's climate change commitments. To promote inclusive digital transformation and AI adoption, programmes that enhance AI literacy and build capacity should be introduced in the creative sector (SACO,2024). Furthermore, policy interventions need to emphasise the importance of incorporating data, which reflects South African local cultural identities, such as languages. This will encourage local content in the development of AI tools. Collaboration between the government, academia, creative communities, and the private sector will promote inclusive innovation ecosystems and sustain the creative industry. By adopting these strategic actions, South Africa will position itself as a supporter and promoter of an ethical, inclusive and sustainable creative economy.

4. Data and Research Methods

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

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

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

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

The methodology also accounts for the fiscal and social contributions of the CCI&S. Estimates of tax revenue generated by the sector are derived from satellite account modelling that

captures both direct and indirect contributions through linkages with other sectors. Poverty reduction is assessed by calculating the share of income from CCI&S that accrues to low-income households. This spatial dimension is critical, as it reveals not only the sector's aggregate economic value but also its distributive effects across provinces and within metropolitan areas.

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

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

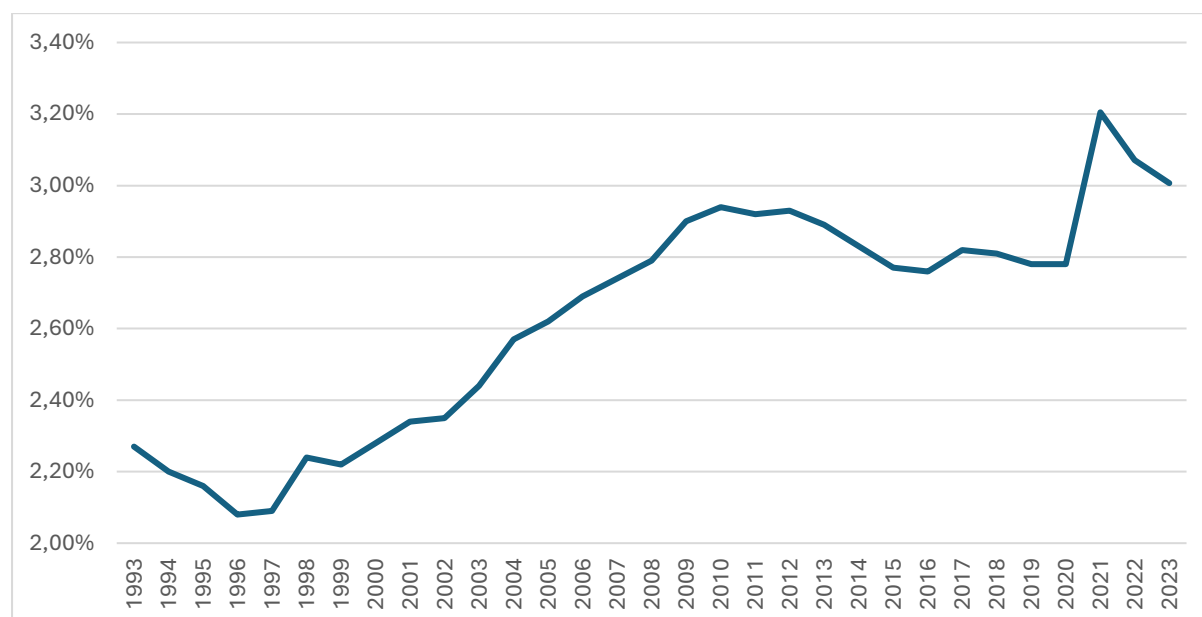
5. GDP Contribution and Growth Rates

5.1. The contribution of the CCI&S to South Africa's GDP

Since 1994, the South African economy has experienced periods of expansion and contraction. One sector that has emerged as a key contributor to economic growth is the creative sector. The role of CCI&S has been evident in both driving economic growth and promoting South Africa's cultural identity. Beyond these, CCI&S have played a significant role in stimulating innovation and creating employment opportunities. Figure 3 below shows the CCI contribution to GDP as a percentage. The data indicates that from 1997 onward, there is an upward trend, indicating that CCI&S's contribution to the country's GDP increased until 2011, after which the sector's contribution decreased. The 2010 FIFA World Cup boosted the economy through large tourist inflows and increased consumer spending, elevating the GDP contribution to approximately 3% in 2010, the highest at the time. However, following the event, the economy returned to its regular sluggish growth path, and in 2011 and the subsequent years, there was a similar growth pattern.

Figure 3 depicts that in 2015 and 2016, CCI contribution to GDP was at its lowest at approximately 2.77% and 2.76% respectively, both below the 2010 peak of around 3%. According to SARB (2016), adverse economic conditions were prevalent in 2015, driven by declining business and consumer confidence levels, demand and supply constraints and a fall in the prices of key export commodities. These economic conditions have had spillover effects on the creative sector, leading to the decline in CCI contribution to GDP observed in 2015 and 2016. There was a slight recovery from 2017 to 2018, with contributions increasing to roughly 2.82% and 2.81% respectively. However, a slight decline follows in 2019 and 2020, with both years recording a contribution of approximately 2.78% to GDP. The COVID-19 pandemic played a significant role in dampening economic activity in South Africa and the rest of the world. The decline was due to travel restrictions, which disrupted live events, production in film and music, and reduced consumer spending. However, the graph shows that CCI recovered from around 2.78% in 2020 to approximately 3.20% in 2021. The increase was primarily due to the easing of restrictions, which led to the resumption of creative activities. In 2022 and 2023, the CCI contribution to GDP was recorded at 3.07% and 3.01%, respectively.

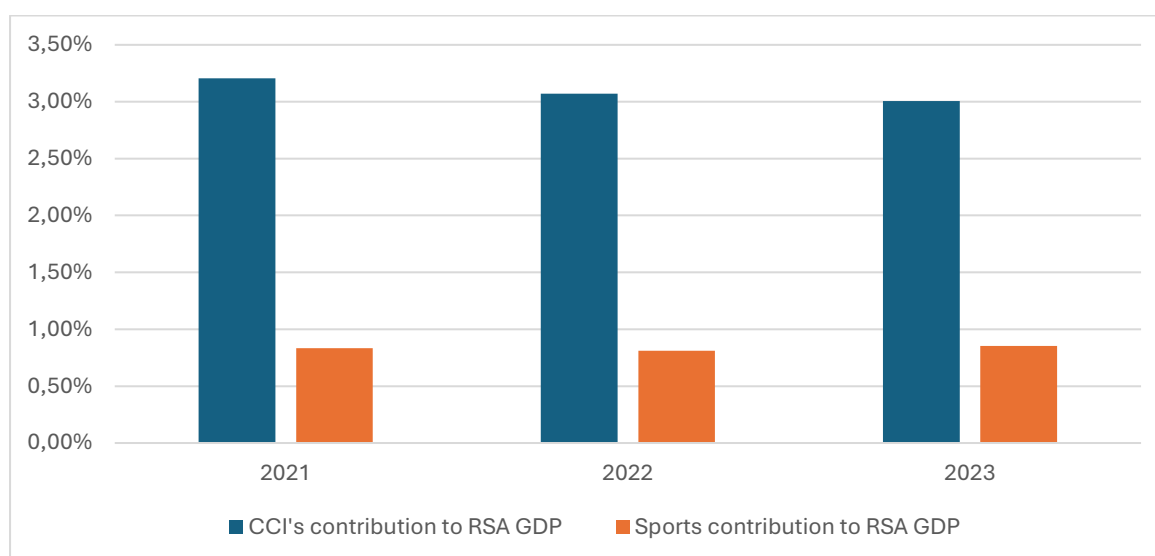
Figure 3: CCI's contribution as a percentage to South Africa's GDP



Source: SARB, Stats SA, SACO data and author calculations, 1993-2023

Despite its existence, the Sports and Recreation domain has not been measured or disaggregated in CCI&S datasets. In 2023, SACO introduced the Sports and Recreation domain into the Mapping Study. Figure 4 below presents the CCI and Sports contribution to South Africa's GDP. A stable contribution of CCI&S towards GDP is evident for the period 2021 to 2023. The results indicate that CCI accounted for more than 3% of GDP during this period, while the Sports and Recreation domain accounted for 0.83% in 2021 to 0.85% in 2023. The Sports domain's contribution to GDP is relatively minor compared to the CCI, but it maintains a stable share of GDP. An industry profile report by AON (2020) indicates that the economic contribution of Sport and Recreation varies across countries, with most estimates ranging from 1% to 2%. Thus, given that the results show the GDP contribution of Sport and Recreation to be about 0.8% (close to 1%) from 2021 to 2023, this aligns with global trends, as depicted in the AON (2020) report for countries such as China, Italy, and Spain.

Figure 4: Contribution of CCI and Sports as a percentage to SA GDP (2021-2023)



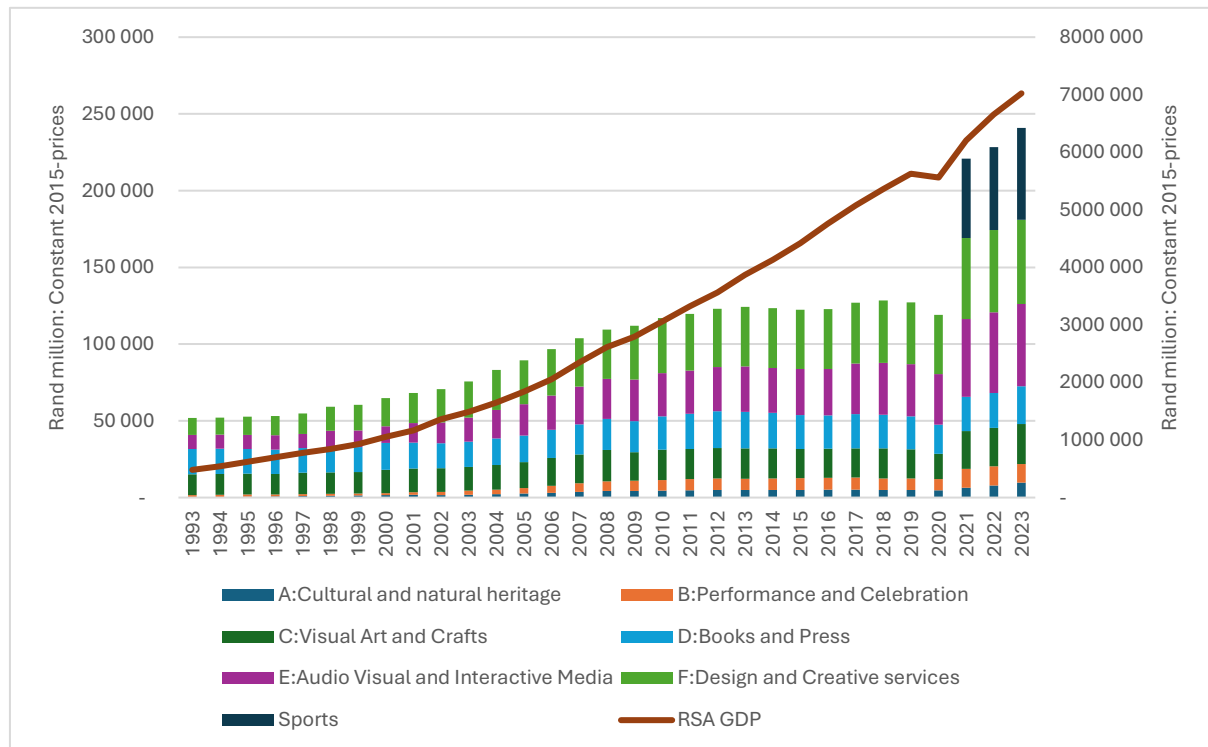
Source: SARB, Stats SA, and author calculations, 2021-2023

The contribution of the CCI&S to South Africa's GDP per domain for the period 1993 to 2023 is presented in Figure 5 below. The graph shows that the contribution of the CCI&S to South Africa's GDP has increased significantly since 1993, especially from the commercial application domains of Design and Creative Services, Books and Press and Audio-visual and Interactive Media. As discussed in Section 2, South African cultural policy has undergone several significant shifts since the dawn of democracy in 1994. While the first White Paper on Arts, Culture and Heritage (DACST, 1996) focused on the social and intrinsic value of culture, the 2012 Mzansi's Golden Economy Programme also emphasised unlocking the sector's potential to contribute to jobs and growth.

The analysis demonstrates that all domains in the creative sector exhibit an upward trend from 1993 to 2023, with several contributing significantly to GDP. Specifically, the Design and Creative Services domain has contributed substantially, from approximately R 10 million in 1993 to R 54 million in 2023. In addition, the Audio Visual and Interactive Media have contributed about R 9 million in 1993 to R 53 million in 2023. Other domains with significant contributions towards GDP include the Visual Arts and Crafts, followed by Books and Press. At the same time, sluggish contribution is observed in domains such as the Cultural and Natural Heritage, contributing about R190 000 in 1993 to approximately R9 million in 2023 and Performance and Celebration, contributing of around R1 million in 1993 to R12 million in 2023.

Nonetheless, the sector has been negatively affected by unprecedented and disruptive events such as the 2008/9 financial crisis and the COVID-19 pandemic. The adverse effects of these events are evident in the declining trends across all domains during the respective periods. In addition, the Sports and Recreation domain has made a significant contribution to the creative economy and has continued to grow from approximately R52 million in 2021 to about R60 million in 2023. The GDP trend shows continued growth over the years, emphasising the sector's significance to the overall economy.

Figure 5: GDP per domain and South African GDP (R millions)



Source: Stats SA, SACO data, and author calculations, 1993-2023

The significance of CCI&S contribution to GDP by domain is further demonstrated by Figure 6 below, which shows the contribution to GDP measured as percentage. From the graph below, we observe that the Cultural and Natural Heritage and the Performance and Celebration domains have a marginal contribution towards GDP, despite their essential roles in the promotion of social and cultural values. Accordingly, these domains recorded contributions to GDP as low as 4.8% in 1993 to about 4.6% in 2000 for Cultural and Natural Heritage and 6.3% in 1993 to 5.4% in 2000 for the Performance and Celebration domain. Similarly, a slight decline is observed in domains such as Visual Arts and Crafts as well as Books and Press. Their respective contributions recorded from approximately 6.4% in 1993 to 5.7% in 2000 for the Visuals Arts and Crafts, and 7.8% in 1993 to approximately 6.7% in 2000 for the Books and Press domain. According to SACO (2020) the slight decline in the Books and Press domain to GDP is attributed to this domain's struggle to adapt to the transition towards digitisation from the late 1990s to the early 2000s. This challenge resulted in the Books and Press cultural sector production to fall leading to a decline of its overall contribution to GDP. While others performed favourably during this period. For example, the Design and Creative Services contributed towards GDP by approximately 5.17% in 1993 to about 6.93% in 2000.

Following the global financial crisis of 2008/09, domains such as Cultural and Natural Heritage, Performance and Celebration, Audio Visual and Interactive Media and Design and Creative services exhibit growth in their contribution to GDP for the period 2009 to 2020. The rise in the contribution of these domains is attributed to the recovery phase from the global financial crisis and the economic boost presented by the 2010 Fifa World Cup. However, the COVID-19 pandemic had adverse effects on economic growth leading to a decline in the contribution to

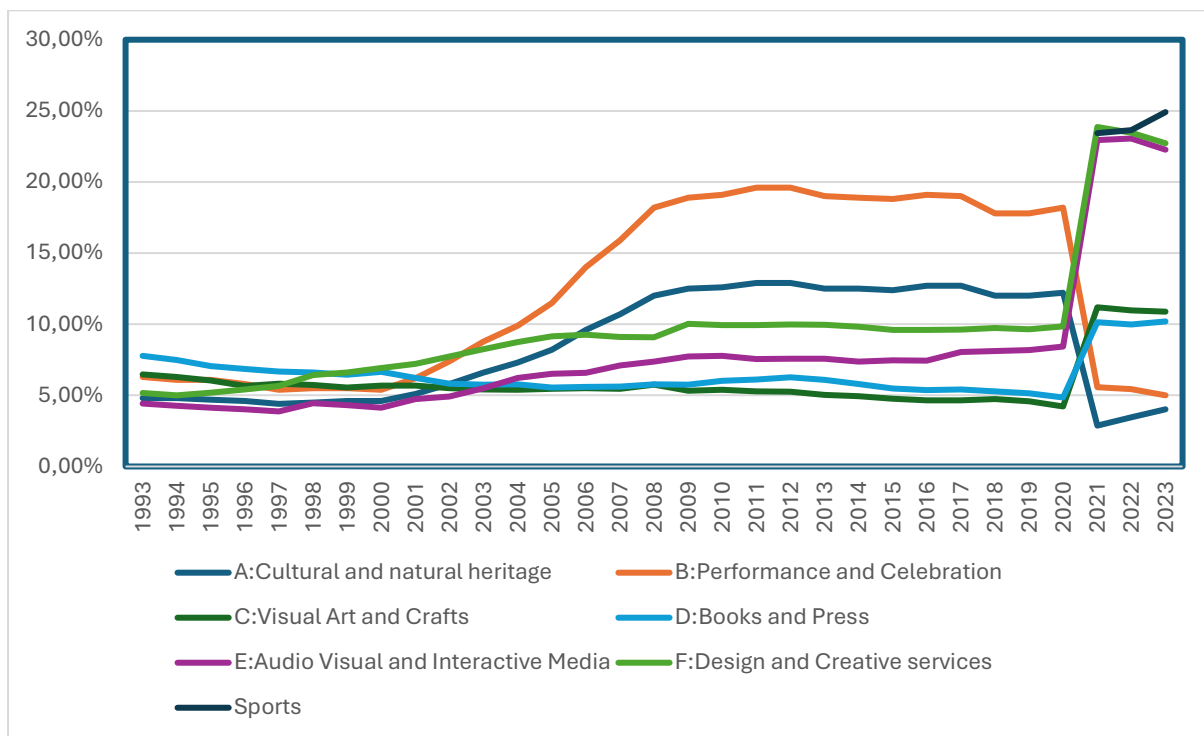
GDP of Cultural and Natural Heritage as well as the Performance and Celebration domains . While domains such as Visual Art and Crafts, Books and Press, Audio Visual and Interactive Media as well as the Design and Creative services exhibit a significant increase from 2020 to 2021. For example, the Visual Arts and Crafts reported an increase from 4,2% to 11,19% in 2020 and 2021 respectively. For the Design and Creative service, the data depicts a rise from 9,9% in 2020 to 23,9% in 2021.

Furthermore, the impact of the pandemic and its aftermath resulted in downward and upward trends in the CCI&S contribution to GDP by domains. To elaborate, we observe the patterns during the period 2020 and 2021, wherein domains such as the Cultural and Natural Heritage as well as the Performance and Celebration exhibit a significant decline in their contribution to GDP during this period. Accordingly, the Cultural and Natural Heritage domain recorded a contribution of approximately 12.2% in 2020 and 2.9% in 2021, while in 2020, the Performance and Celebration domain recorded a contribution of about 18.2% to approximately 5.6% in 2021.

On the other hand, Visual Art and Crafts, Books and Press, Audio Visual and Interactive Media and Design and Creative services recorded a significant rise in their contribution to GDP during 2020 and 2021. Accordingly, Visual Art and Crafts increased from approximately 4.2% in 2020 to roughly 11.2% in 2021. Similarly, Books and Press recorded a rise from 4.85% to 10.15% in 2020 and 2021 respectively. While a significant growth is evident in the Audio Visual and Interactive Media and Design and Creative services domains, which recorded approximately 8.4% to 22.9% and 9.9% to 23.9% during this period respectively.

Subsequent years indicate an improvement in the contribution to GDP by all domains. For example, the Cultural and Natural Heritage domain recorded a contribution of approximately 3.5% in 2022 to roughly 4% in 2023. Furthermore, data on the Sports and Recreation domain has been recorded from 2021 to 2023 and it indicates that the domain has been contributing to GDP above 20% throughout this period.

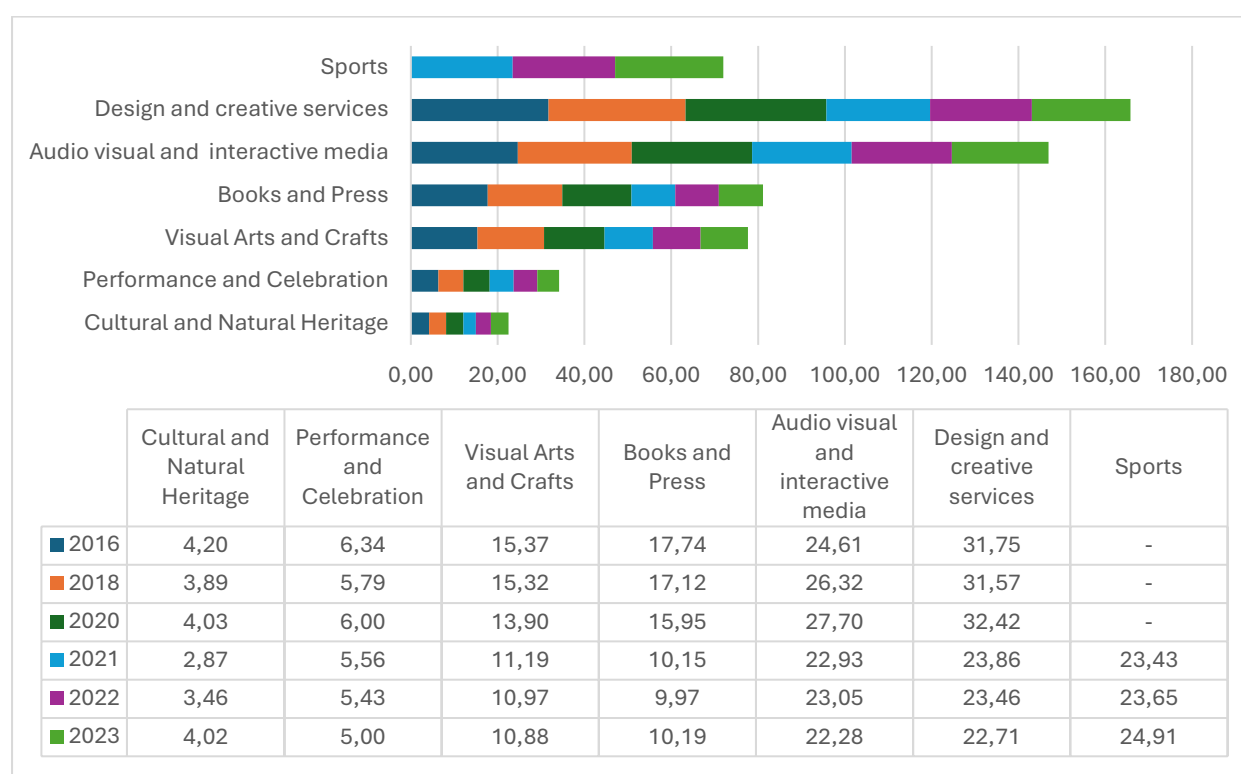
Figure 6: CCI&S Domain Contribution to GDP (%)



Source: Stats SA, SACO data, and author calculations, 1993-2023

Figure 7 below depicts the percentage composition of GDP by domain for the period 2016 to 2023. The top contributors to GDP are the Sports and Recreation, Design and Creative Services and Audio and Visual domains, collectively accounting for about 70% of the CCI&S GDP in 2023. The introduction of the Sports and Recreation domain in the Mapping Study has reduced the share of contributions from the other domains. However, all domains increased their contribution to GDP in absolute terms.

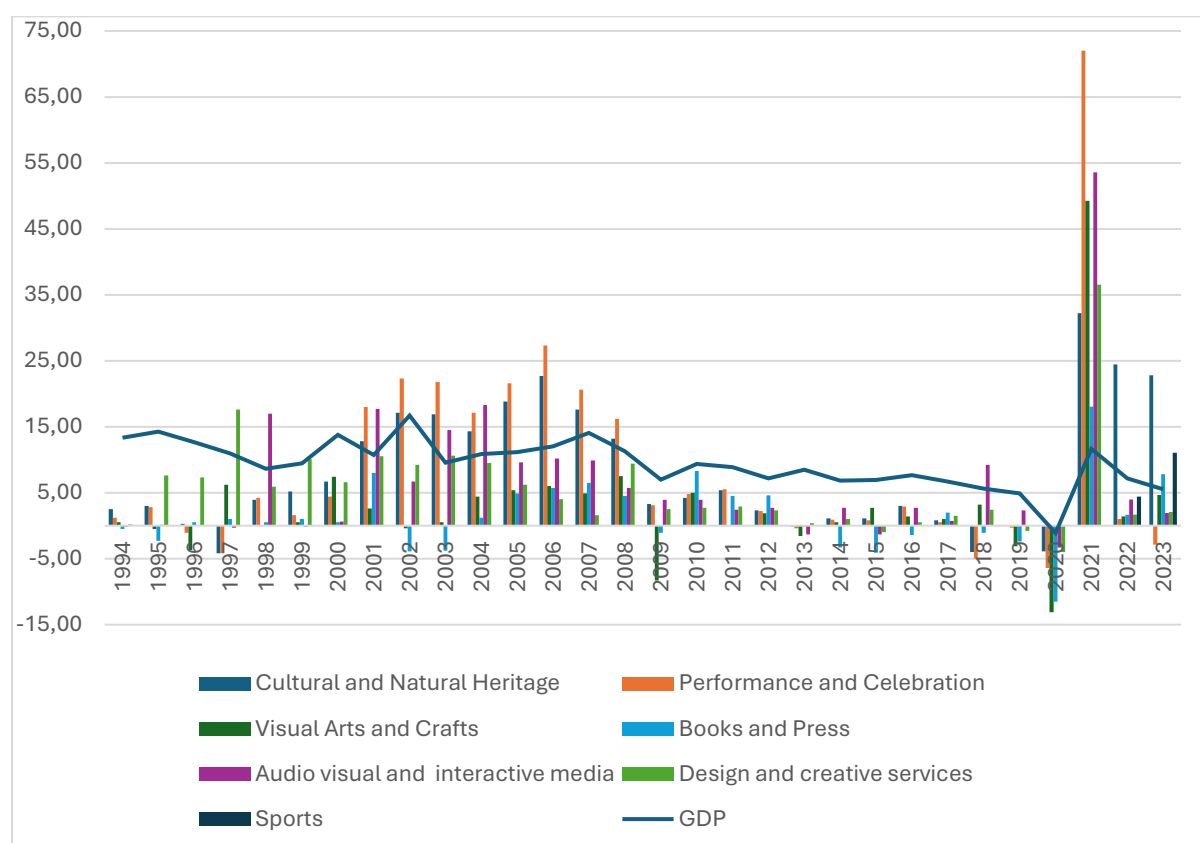
Figure 7: Percentage Composition to GDP by Domain, 2016-2023



Source: Stats SA, SACO data, and author calculations, 2016-2023

Figure 8 below shows the growth rates of the domains over time, along with South Africa's GDP growth rate from 1998 to 2023. The results indicate steady growth across all domains until the 2008/2009 financial crisis, during which a sharp decline is evident in domains such as Cultural and Natural Heritage and Performance and Celebration. Beyond 2009, there is a steady growth trend in almost all domains until 2013, after which a significant decline is evident in nearly all domains. All domains except Books and Press show recovery patterns from 2016 to 2019. The COVID-19 pandemic resulted in a sharp decline in growth rates across all domains. From 2021 to 2023, both the GDP line and growth rates across all domains show a recovery.

Figure 8: Percentage change per domain per annum, 1994-2023



Source: Stats SA, SACO data and author calculations, 1994-2023

Table 3 below presents the compound annual growth rates from 1993 to 2023, per domain and for the CCI&S overall. Significant growth is observed across all domains except Books, Press, and Visual Arts and Crafts for the period 1993 to 2002. From 2003 to 2012, an upward trend is evident, despite the financial crisis. From 2012 to 2019, the average annual growth rates across all domains declined, with Performance and Celebration, Visual Arts and Crafts, and Books and Press showing negative trends. The annual growth rates from 2018 to 2020 indicate that all domains declined significantly, which is attributed to the adverse effects of the COVID-19 pandemic. The period 2021 to 2023, which includes the Sports and Recreation domain, suggests that almost all domains in the creative sector recovered from the pandemic, except for Performance and Celebration.

The ongoing decline in the Performance and Celebration domain over the past three periods reflects both long-term structural challenges and short-term shocks. From 2013 to 2019, growth in this domain stagnated at -0.09% , primarily due to limited investment in public live arts infrastructure, limited private-sector participation, and the informal nature of the performing arts labour market. These factors restricted the capacity to scale production and export performance-based content (UNESCO, 2020; SACO, 2024). The period from 2018 to 2020 experienced a significant contraction of -1.94% . This coincided with subdued household consumption, rising operational costs for festivals and theatre productions, and early digital disruptions that shifted consumer preferences toward streaming and on-demand entertainment. The COVID-19 pandemic further exacerbated these trends, leading to the

cancellation of live events, the closure of venues, and income loss for thousands of performers. This resulted in a near-total collapse of the live performance economy (UNCTAD, 2022). Although there was a gradual reopening of the economy from 2021 to 2023, recovery remained slow, with a decline of -0.95%. This muted recovery can be attributed to ongoing financial fragility among performing arts institutions, audience hesitancy, and the slow adoption of digital and AI-enabled production tools. Collectively, these factors indicate that the decline in the Performance and Celebration domain began before the COVID-19 pandemic and is rooted in both structural underinvestment and technological lag within South Africa's live performance ecosystem.

Table 3: Average annual growth rates by domain over time

Compound Annual Growth Rate	Cultural and Natural Heritage	Performance and Celebration	Visual Arts and Crafts	Books and Press	Audio-visual and Interactive Media	Design and Creative Services	Sports and Recreation	Total
1993–2002	4,80%	5,16%	1,33%	-0,09%	4,38%	7,90%	-	2,99%
2003–2012	9,96%	12,81%	2,90%	4,21%	6,98%	5,45%	-	4,99%
2013–2019	0,33%	-0,09%	-0,54%	-1,74%	2,38%	0,55%	-	0,32%
2018–2020	-1,98%	-1,94%	-8,25%	-7,04%	-1,16%	-2,38%	-	-0,93%
2021 - 2023	23,63%	-0,95%	3,01%	4,69%	2,94%	1,90%	7,68%	4,45%

Source: Stats SA, SACO data and Author calculations, 1993-2023

6. Job Creation and Transformation

As described in the Data and Research Methods section above, StatsSA dataset (available up to 2024) was used to determine the trends in cultural occupations. The analysis was divided into four periods:

- Period 1: 2005–2010, pre-global financial crisis, during the crisis, and immediate aftermath.
- Period 2: 2011–2015, post-financial crisis recovery phase
- Period 3: 2016–2020, transition period leading up to the COVID-19 pandemic.
- Period 4: 2021–2024, post COVID-19 recovery and digital transformation

As explained earlier in the report, the analysis is for “cultural occupations”, that is, for people in what are classified as cultural or creative jobs, some of which may be in a cultural industry, and some of which may be embedded in non-cultural industries.

6.1 The contribution of the CCI&S to job creation in South Africa

The cultural occupations trend is illustrated in Figure 9 below for the period 2008 to 2024. The graph shows that in 2008, cultural occupations accounted for approximately 3.2% of the workforce, or about 475,000 jobs. A significant decline is observed in both the number and percentage of cultural occupations in total employment between 2009 and 2015. In 2009, the number of cultural occupations dropped to about 378,000 (down from about 478,000 in 2008) and a share of 2.6%. The decrease can be attributed to the 2008/09 global financial crisis, which constrained the overall economy and led to reduced employment levels in all sectors, including the creative industry. The period from 2010 to 2018 shows a fluctuating trend in both the number of occupations and their share of total employment. Before the COVID-19 pandemic, the industry was on a recovery path, recording about 456,000 jobs in 2020. However, following the COVID-19 pandemic, the number and percentage of cultural occupations fell significantly from 2021 to 2023, reaching as low as 374,000 and 2.3% in 2023. A slight recovery is observed in 2024, with the number increasing to approximately 419,000.

Figure 9 : Number and percentage of people in cultural occupations 2008–2024



Source: StatsSA, SACO data and author calculations, 2008–2024

Table 4: Average percentage of cultural occupations in each domain by time period

	Period 1: 2005–2010	Period 2: 2011–2015	Period 3: 2016–2020	Period 4: 2021–2024	% Change P1 to P4
Cultural and Natural Heritage	0,30%	0,60%	0,50%	0,44%	47,28%
Performance and Celebration	2,70%	4,00%	4,60%	5,87%	117,24%
Visual Arts and Crafts	46,90%	42,60%	42,90%	2,27%	-95,16%
Books and Press	18,50%	17,40%	14,90%	16,92%	-8,55%
Audio-visual and Interactive Media	0,90%	1,90%	2,60%	36,53%	3958,59%
Design and Creative Services	11,60%	13,50%	12,50%	28,28%	143,77%
Intangible Cultural Heritage	19,20%	20,10%	22,10%	9,70%	-49,49%
Total	100,00%	100,00%	100,00%	100,00%	-

Source: StatsSA, SACO data and author calculations, 2005–2024

Table 4 above depicts changes in the cultural occupations by domain from 2005– 2024. The data indicate that most cultural occupations are concentrated in the Visual Arts and Crafts domain. The average share of cultural occupations in Period 1 is reported to be 46.90%; a

slight decline is observed in Period 2 to approximately 42.60%, and in Period 3 to approximately 42.90%. Despite this decrease, the Visual Arts and Craft domain remains the dominant contributor to cultural occupations. According to SACO (2019), the Visual Arts and Craft domain exhibits a rising trend in occupations, mainly because the craft sector has relatively low barriers to entry, including low start-up costs, and low formal educational requirements. However, from 2021 to 2024, the average percentage of cultural occupations in the Visual Arts and Crafts drastically declined to 2.27%. Given that this decline occurred immediately after the outbreak of the COVID-19 pandemic, it is attributed to job losses and the sharp contraction of economic activity. In addition, the rapid shift of cultural activities to online platforms such as streaming, virtual concerts and online art exhibitions and the adoption of AI tools in the sector, disadvantaged creators with limited formal education and resources (WIPO,2022)

Intangible Cultural Heritage is the second largest domain followed by Books and Press in cultural occupations. Intangible cultural activities include social events, oral traditions and storytelling and traditional knowledge systems. These activities involve physical interaction, and the COVID-19 pandemic, with its lockdown restrictions, social distancing and event cancellations, led to significant job losses for creatives. Thus, the drastic decline in this domain's average percentage of cultural occupations from 4.70% in period 4 to 9.70% in period 9 is attributed to these effects (UNESCO, 2021). In 2005-2010, the Books and Press domain accounted for 18.50% of cultural occupations; however, a slight decline was observed in the periods 2011-2015 and 2016-2020, reaching its lowest level of 14.90%. The post-COVID-19 pandemic period (2021-2024) shows a slight recovery to 16.92%. The Audio-visual and Interactive Media, Design, and Creative Services depict low, fluctuating trends (lowest at 0.90% and 11.60% respectively) in period 1 (2005-2010) until period 4 (2021-2024), where the domains significantly improved to 36.53% and 28.28% respectively. Finally, the cultural occupations percentage share in all the periods under study remained low for the Cultural and Natural Heritage as well as for the Performance and Celebration domains. This trend analysis shows that factors such as education significantly influence the number of cultural occupations. For example, the Visual Arts and Crafts domain requires minimal formal education, which contributes to a rising average employment level. In contrast, the Audio-visual and Interactive Media, as well as Design and Creative services, have stricter formal education requirements, which explains the fluctuating trend observed in these domains.

6.2. Socio-demographic profile of those working in cultural occupations over time

Gender and transformation profiles are integral to tracking changes in cultural occupations, particularly among those working in cultural jobs. Table 5 below presents data on gender, population and youth in cultural occupations over time. First, the study assesses the trend in occupations according to gender. The results show that between 2005 and 2010, about 51.4% of women were employed in cultural roles, followed by a decline to 44.80% between 2011 and 2015 and 42.30% between 2016 and 2020. The percentage of women in cultural occupations recovered in Period 4 to 45.04%.

Furthermore, the data presents cultural occupations per population group. There is a notable increase in the percentage of cultural occupations for population groups, namely Black Africa, Coloured and Indian/Asian origin, from 81.5% in Period 1 to 85.12% in Period 4. For this

analysis, youth refer to individuals aged between 18 to 34 years. The results indicate a rise in the share of cultural occupations from 36.1% in Period 1 and 39.5% in Period 4. The evidence shows that a relatively steady transformation is in progress within the sector.

Table 5: Gender, population group and youth in cultural occupations over time

	Period 1: 2005–2010	Period 2: 2011–2015	Period 3: 2016–2020	Period 4: 2021–2024
Percentage of women in cultural occupations	51,40%	44,80%	42,30%	45,04%
Percentage of women in non-cultural occupations	51,80%	50,80%	44,10%	47,43%
Percentage of black African, coloured & Indian people in cultural occupations	81,50%	80,10%	84,30%	85,12%
Percentage of black African, coloured & Indian people in non-cultural occupations	90,00%	90,90%	87,40%	86,75%
Percentage of youth (up to 34) in cultural occupations	36,10%	38,00%	38,80%	39,50%
Percentage of youth (up to 34) in non-cultural occupations	57,50%	55,40%	41,30%	45,2%

Source: StatsSA, SACO data and author calculations, 2005-2024

The education levels of workers in the cultural and non-cultural occupations are presented in Table 6 below. The examination of the share of workers who have completed high school in both cultural and non-cultural occupations indicates an upward trend. The data reveal that for cultural occupations, the share increased from 25.9% in Period 1 to 42.19% in Period 4; similarly, for non-cultural occupations, the share increased from 17.9% in Period 1 to 33.84% in Period 4. When assessing the share of occupations among workers with a tertiary qualification, a similar upward trend is observed across both cultural and non-cultural occupations. The results indicate a rise from 19.7% in Period 1 to 20.52% in Period 4 for cultural occupations, while for non-cultural occupations, an increase from 7.1% in Period 1 to 22.63% in Period 4 is evident. This is attributed to the consistent rise in school completion rates from 2010 to 2024 as reported by Wills et al. (2024). The report also concludes that higher education levels are directly associated with higher employment opportunities, which aligns with the results in Table 6.

Table 6: Education levels of cultural and non-cultural workers over time

	Period 1: 2005–2010	Period 2: 2011– 2015	Period 3: 2016–2020	Period 4: 2021–2024	Percentage growth P1 to P4
Percentage of people in cultural occupations who had completed high school	25,90%	26,80%	26,70%	42,19%	62,88%
Percentage of people in non-cultural occupations who had completed high school	17,90%	18,30%	32,40%	33,84%	89,07%
Percentage of people in cultural occupations with tertiary education (13+ years)	19,70%	28,40%	27,70%	20,52%	4,16%
Percentage of people in non-cultural occupations with tertiary education (13+ years)	7,10%	8,30%	21,30%	22,63%	218,76%

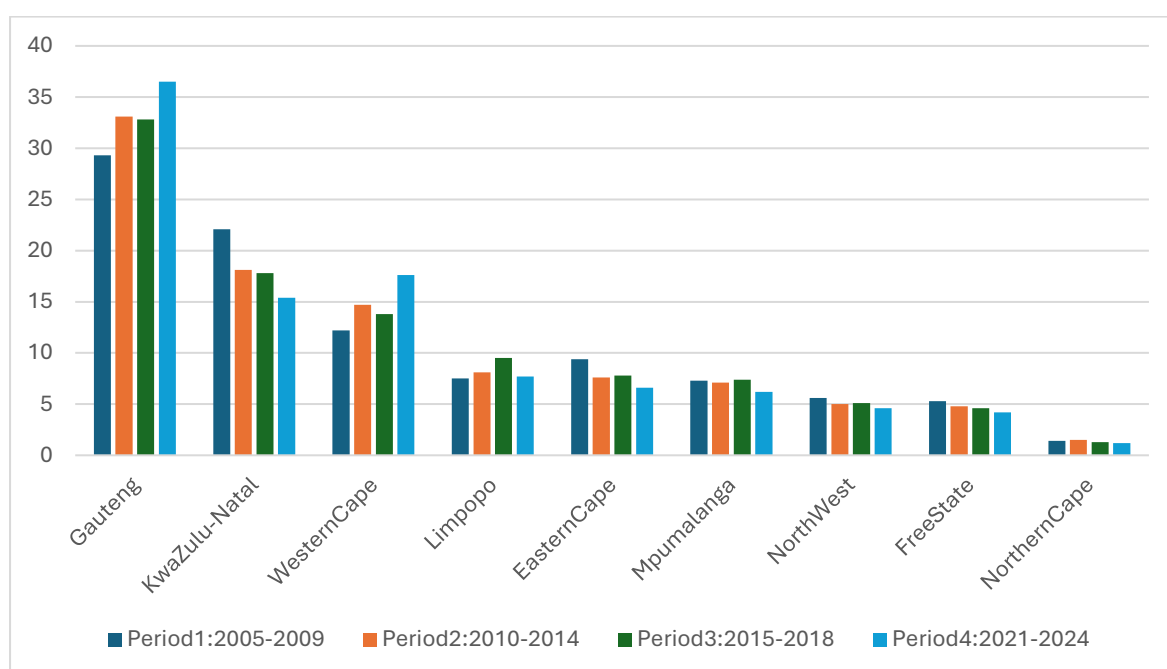
Source: StatsSA, SACO data and author calculations, 2005-2024

5.3. Changes in geographical distribution of cultural occupations

Figure 10 below presents the spatial distribution of cultural occupations. The figure shows that the provinces with the most significant metropolitan areas, which are Gauteng, KwaZulu-Natal and the Western Cape, are associated with the highest proportions of cultural occupations from period 1(2005-2010) to period 4 (2021-2024). These patterns show that cultural and creative industries tend to cluster around large cities because these areas offer improved access to markets, specialist services, and other supplies, a pattern well documented in the literature (see Chapter 4 for further discussion of the spatial distribution of the CCI&S).

Gauteng consistently has the highest proportion of cultural occupations among all provinces, with its share increasing over time from 29.3% in Period 1 to 36.8% in Period 4. Following this, KwaZulu-Natal has the second largest share of cultural occupations, but this declined from 22.1% in Period 1 to 15.4% in Period 4. The third largest is the Western Cape, which increased its share of cultural occupations from 12.2% in Period 1 to 17.6% in Period 4. Furthermore, although Limpopo has a relatively small share, its proportion of cultural occupations has increased over time: from 7.5% in Period 1 to 9.5% in Period 3 but then declined to 7.7% in Period 4. Rural provinces, such as the Eastern Cape, Mpumalanga, Northern Cape, Free State and North-West, have been losing cultural occupations over time, which suggests that cultural occupations in South Africa are becoming more spatially concentrated.

Figure 10: Changes in the percentage of cultural occupations by province over time



Source: StatsSA, SACO data and author calculations, 2005-2024

7. International Cultural Goods Trade over time

The cultural and creative sector has become an increasingly important component of international trade, given its contribution to GDP and employment (UNESCO, 2016). Nonetheless, the industry has the potential to make a significant contribution to growth and development in small open economies such as South Africa if trade is harnessed appropriately. Growth prospects are evident in the exports of cultural goods, as they strengthen domestic production capabilities and create employment. In addition, the imports of cultural goods contribute significantly to the development of domestic production capabilities by providing essential inputs such as technology. Thus, Chang and Andreoni (2020) argue that trade policy must be acknowledged as an integral part of industrial policy and economic strategies in both developed and developing countries.

Against this background, the discussion of South Africa's cultural goods trade over time in this report is divided into two main parts. The first part analyses trends in the country's cultural goods exports, imports, and trade balance for the period 2001 to 2024, highlighting the impact of the global pandemic and its aftereffects, as well as the impact of digitisation and AI on these trends in the most recent quarters of the period under study. Further, the section investigates trends in total commodity trade and their influence on South Africa's overall cultural goods trade over the same period. Finally, the first part examines the trends in cultural goods trade by domain for the period 2001 to 2024.

The second part of this section provides an analysis of the geographical pattern of South Africa's cultural goods trade over time. In this regard, the study focuses on South Africa's cultural exchange with the top twenty trading partners over selected years, with respect to

both the destination of the country's cultural goods exports and the origin of cultural goods imports.

7.1. The proportion and composition of South Africa's cultural goods trade

International trade has been affected by global and country-specific fluctuations in economic activity over recent decades, and these fluctuations have been exacerbated by shocks such as the global financial crisis and the COVID-19 pandemic. The increasing adoption of digitisation has had a significant impact on the trade in cultural products, specifically in the Book and Press, Audio-visual and Interactive Media, Performance AND Celebration domains (UNESCO, 2016). In addition, Salani and Tapfuma (2025) argue that the increasing availability and accessibility of artificial intelligence have transformed the publishing value chain, presenting opportunities and challenges for publishers. As such, AI has been integrated into the entire publishing value chain, streamlining the processes of content acquisition by authors and publishers, content and product development, and product marketing and distribution.

To demonstrate trends in trade in cultural goods, Figure 11 below illustrates South Africa's cultural goods exports and imports from 2001 to 2024, measured in US\$ millions in nominal terms. The graph indicates a sharp decline in cultural goods exports and imports between 2008 and 2009. This is attributed to the global financial crisis, which had adverse effects on the overall economy and, consequently, on the creative industries. In 2010, the results indicate that both the cultural goods exports and cultural goods imports increased significantly, with imports exhibiting a more rapid increase relative to exports. The data show that cultural goods exports increased to approximately US\$248 million, while cultural goods imports rose significantly to around US\$592 million in 2010. This sharp increase reflects South Africa's post crisis supported by events such as the 2010 FIFA World Cup. As projected by Saayman and Rossouw (2008), this event offered significant marketing opportunities, with products, including cultural goods, advertised to a global audience. This, in turn, will improve competitiveness in foreign export markets and in domestic import demand.

Notably, cultural goods imports continued to rise between 2010 and 2012, while exports grew marginally, widening South Africa's cultural goods trade deficit until 2012. From 2012, the cultural goods imports exhibit a declining trend, falling from approximately US\$673 million in 2012 to US\$258 million in 2020. This trend reflects the negative impact of COVID-19 on overall cultural trade. On the other hand, cultural goods exports increased from US\$248 million in 2010 to US\$449 million in 2018, with a sharp rise. The subsequent years indicate that this rise occurred until 2018. The growth is attributed to rising demand for African fashion prints and increased interest in African art and music, which led to South Africa's cultural goods exports growing at a remarkable 14.6% per year between 2015 and 2018 (Signé, 2025). However, in 2019, cultural goods exports fell drastically, a trend that continued through 2024, when exports were recorded at approximately US\$303 million. A major contributor to this decline was the COVID-19 pandemic, which accelerated the transition to digital goods. This created a technological gap between developed and developing economies, contributing to a decrease in demand for South African exports, including cultural goods, during this period (Signé, 2025). This trend analysis indicates that, despite economic shocks, trade in cultural goods has remained resilient.

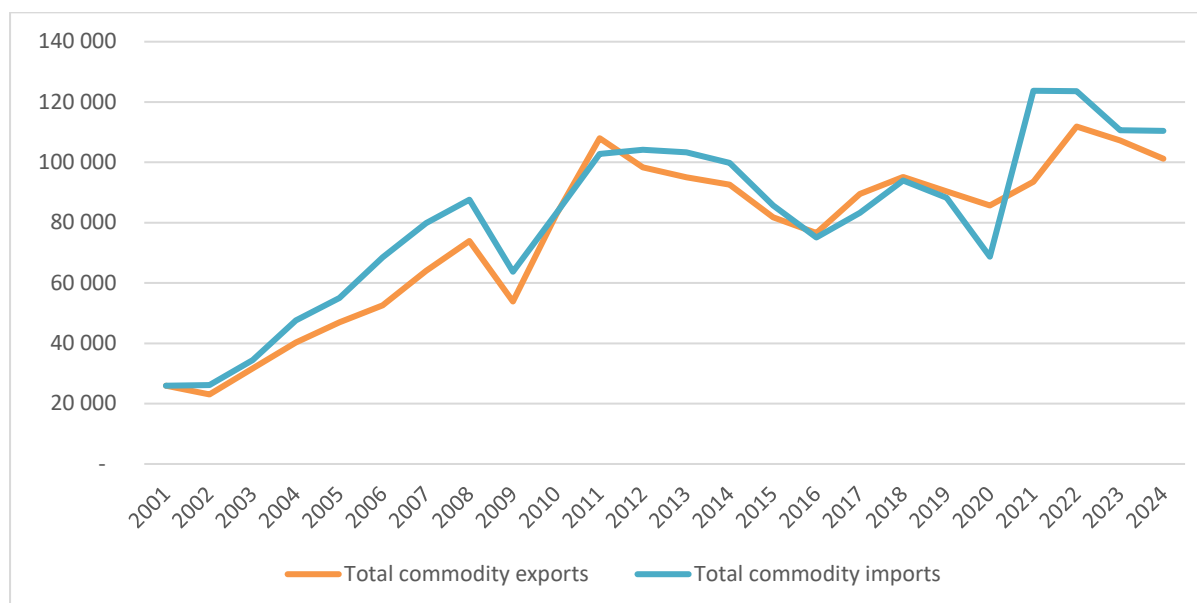
Figure 11 :South Africa's cultural goods trade in current US\$ millions



Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

Likewise, Figure 12 compares the trends in cultural goods trade over the period 2001 to 2024. The graph indicates that between 2001 and 2007, both total commodity exports and imports rose, yet imports grew faster than exports starting in 2002, resulting in an increase in South Africa's trade deficit for cultural products. Notably, the global financial crisis of 2008/9 led to a sharp decline in the total commodity exports and imports. The results for total commodity trade indicate that both exports and imports exhibit an upward trend in 2009, reaching approximately US\$54 million and US\$64 million, respectively. This is followed by sluggish growth from 2010 to 2014, followed by a sharp decline in 2015. The decline is attributed to low levels of business and consumer confidence, weak demand conditions, persistent supply-side constraints, and a decline in key export commodity prices (SARB, 2016). In 2022, total commodity exports and imports rose significantly to approximately US\$111 million and US\$124 million, respectively, despite the adverse effects of the pandemic. However, the total commodity imports declined in 2024 to approximately US\$110 million. Similarly, the total commodity exports fell to approximately US\$101 million in 2024. Overall, the results indicate that from 2001 to 2024, cycles of growth and decline are evident in South Africa's cultural trade, influenced by external economic shocks such as the global financial crisis and the COVID-19 pandemic. Furthermore, the trend analysis presented in Figure 11 above indicates that, domestically, the various economic events and the adoption of AI and technology have had a mixed impact on the creative economy.

Figure 12: South Africa's total commodity trade in current US\$ millions



Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

Table 7 and Figure 13 below illustrate the trends of South Africa's cultural goods exports and imports as shares of total commodity exports and imports, respectively, from 2001 to 2024. According to the results, cultural goods exports grew significantly from US\$89 million in 2001 to approximately US\$182 million in 2006. In 2009, cultural goods exports declined sharply to approximately US\$146 million. The downward trend did not last long, as the data show that cultural goods exports increased from approximately US\$250 million in 2012 to US\$314 million in 2021. However, between 2022 and 2023, cultural goods exports fell by approximately US\$296 million and US\$278 million, respectively. This downward trend is attributed to delayed recovery from the COVID-19 pandemic. In addition, Signé (2025) notes that the South African economy delayed recovery post-pandemic due to significant adverse effects and the technological gap between developed and developing economies created by digitisation, which further contributed to a decrease in demand for South African cultural goods exports. Furthermore, when assessing cultural goods exports as a share of total commodity exports, the results indicate relative stability, peaking at 0.47% in 2018 and 0.28% in 2024.

Similarly, Figure 13 shows that in the early 2000s, the share of cultural goods exports performed fairly well. The share of exports remained stable at approximately 0.3% to 0.4% from 2001 to 2009; however, a decline is evident in 2010, with exports recording a share of 0.27%. This decline contrasts with the projections by Saayman and Rossouw (2008), who expected the 2010 FIFA World Cup to improve the competitiveness of South Africa's goods in foreign export markets.

On the other hand, Table 7 indicates that imports rose significantly in 2006 and 2012, reaching approximately US\$601 million and approximately US\$673 million, respectively. Subsequently, cultural goods imports fell sharply to \$240 million in 2021, with the downward trend continuing through 2024. The share of cultural goods imports in total commodity trade declined from 0.88% in 2006 to just 0.15% in 2020. This trend suggests that in recent years there has been less reliance on imported cultural goods. Furthermore, the sharp decline in cultural goods

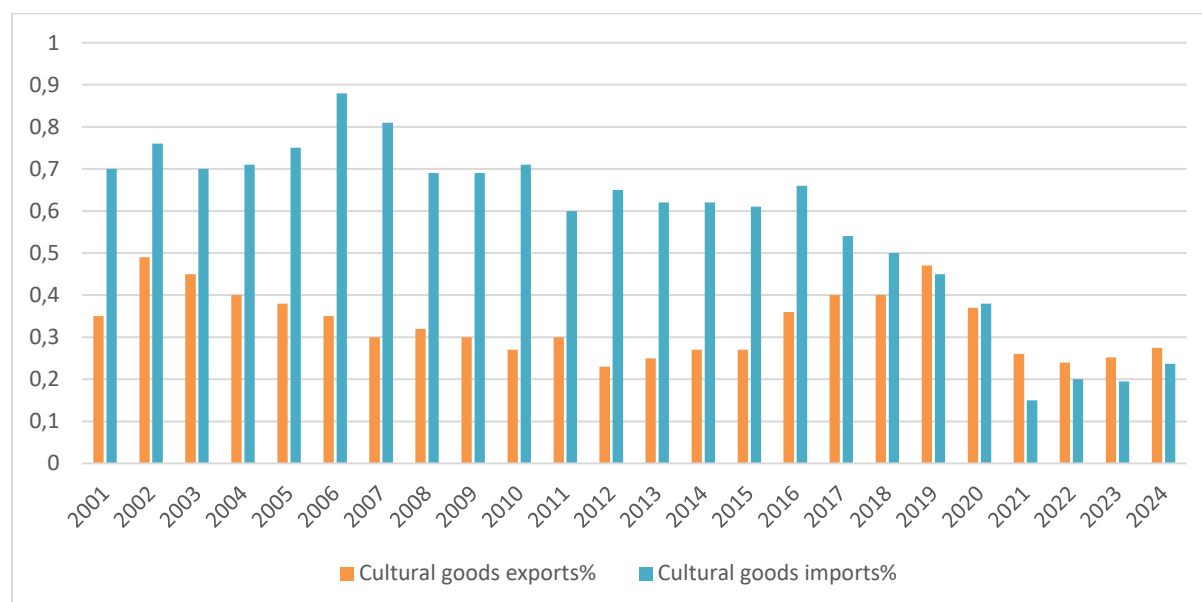
imports post-2012 may reflect growth in local production, policy changes, or shifting consumer preferences. In addition, Edwards and Jenkins (2015) suggest that the increased import penetration from China in the South African manufacturing sector from 2000 onwards may have contributed to the rise in South Africa's overall imports, with potential spillover effects on the creative industry. The upward trajectory depicted by the data from 2003 to 2015 aligns with this narrative. However, a notable decline is evident from 2018 (US\$473 million) to US\$239 million in 2024, suggesting an expansion of the local production and consumption of local cultural content.

Table 7: South Africa's cultural goods trade: USD millions and percentage shares of total commodity trade

Cultural goods	2001	2003	2006	2009	2012	2015	2018	2020	2021	2022	2023	2024
Exports (USD millions)	89,74	141,74	181,75	146,48	250,18	297,94	448,86	316,46	313,94	296,25	278,46	303,66
Imports (USD millions)	178,73	242,55	601,07	443,00	673,44	519,13	473,23	257,80	240,34	224,24	209,02	239,43
Exports % share	0,35	0,45	0,35	0,27	0,25	0,36	0,47	0,37	0,26	0,24	0,25	0,28
Imports % share	0,7	0,7	0,88	0,69	0,65	0,61	0,5	0,38	0,15	0,20	0,19	0,24

Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

Figure 13: Percentage shares of cultural goods trade in South Africa's total commodity trade



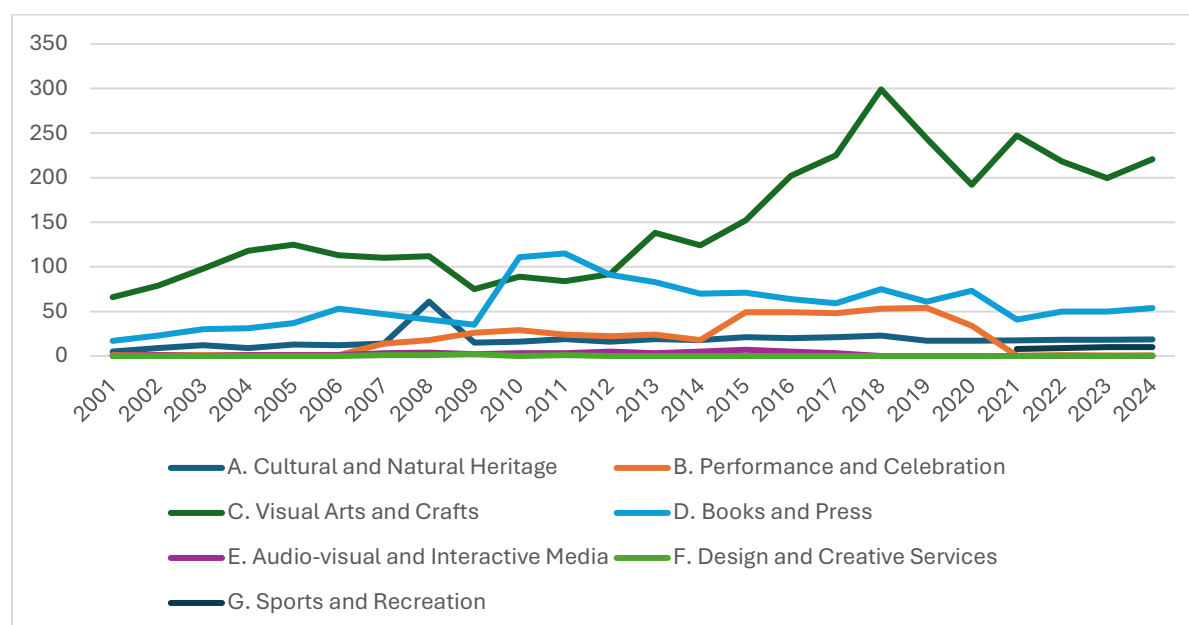
Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

Figure 14 below presents South Africa's cultural goods exports by domain for the period 2001–2024. Over this period, significant growth in cultural goods exports is evident in the Visual Arts and Crafts and Book and Press domains. This increase is linked to the availability and accessibility of AI, which has transformed the publishing value chain and presented publishers with growth opportunities (Salani and Tapfuma, 2025). Additionally, SACO (2024) highlights

that generative AI tools are mainly being used to generate text and visual content, which explains the growth in cultural goods exports observed in the Visual Arts and Crafts domain. Notably, a decline occurred in 2020 for the Visual Arts and Crafts domain, while the Books and Press domain exhibits a decline in 2021. Accordingly, the Visual Arts and Crafts domain fell from approximately US\$244 million in 2019 to about US\$192 million in 2020. Similarly, the Books and Press declined from approximately US\$73 million to approximately US\$40 million. The decline is attributed to the effects of the COVID-19 pandemic, which slowed overall economic growth and, in turn, negatively affected cultural goods exports. Subsequently, a slight increase is observed from 2023 to 2024 in both the Visual Arts and Crafts and Book and Press domains.

The figure further indicates that the least performing domains in terms of cultural goods exports include Performance and Celebration, Audio-visual and Interactive Media, Design and Creative, and Cultural and Natural Heritage. However, notable growth in cultural goods exports was recorded in 2008 in the Cultural and Natural Heritage domain, reaching approximately US\$61 million. The Performance and Celebration domain also recorded growth in the period 2015 to 2019, rising from approximately US\$49 million in 2015 to US\$54 million in 2019. In addition, there were negligible cultural goods exports from the Audio-visual and Interactive Media and Design and Creative Services domains. Finally, the cultural goods exports reported for the Sports and Recreation domain, which were only recorded from 2021, show insignificant growth, ranging from US\$7 million in 2021 to US\$9 million in 2024. This limited growth may support AON's (2020) argument that the Sports & Recreation domain has a relatively smaller global market compared to domains such as Visual Arts and Craft.

Figure 14: South Africa's cultural goods exports by domain 2001-2024 (US\$ millions)



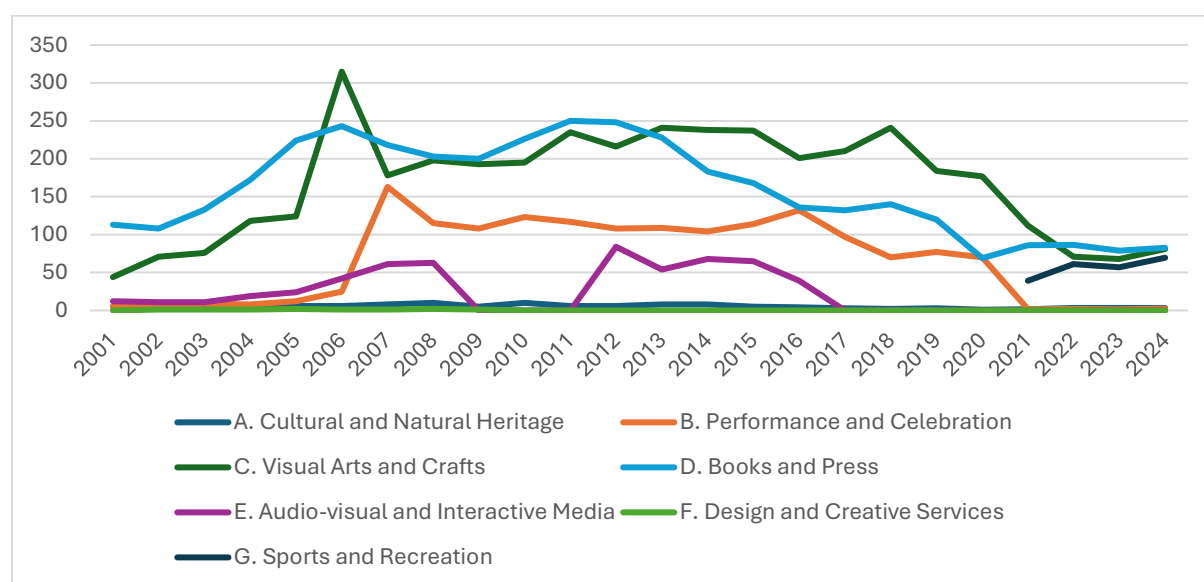
Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

From the import's perspective, Figure 15 below presents South Africa's cultural goods imports by domain for the period 2001 to 2024. The figure shows that the Books and Press and Visual Arts and Crafts domains, followed by the Performance and Celebration domain, exhibit significant growth during this period. The 2008 global financial crisis led to a decline in the share of cultural goods imports in the Books and Press, Visual Arts and Crafts and Performance and Celebration domains. The Books and Press domain exhibits growth until a sharp decline in 2014, followed by a period of decline. Furthermore, the cultural goods imports from the Books and Press domain declined drastically between 2015 and 2020. This decline is attributable to the adverse economic conditions in 2015, characterised by subdued business and consumer confidence levels, muted demand conditions and the COVID-19 pandemic

The Performance and Celebration was a significant domain for cultural goods imports in the 2006 to 2020 period, rising from US\$25 million to US\$75 million; however, imports from this domain drastically declined from 2020 to approximately US\$3 million in 2024. Further, import trends for the Audio-visual and Interactive Media domain show a sharp decline in the period 2012–2017. Imports were also very low compared to those during the period 2009–2011 and again in 2017–2024, indicating that this domain was mostly affected by the aftermath of the global crisis and the COVID-19 pandemic. While other domains recovered significantly from the pandemic, the Audio-visual and Interactive Media failed to recover fully. In addition, cultural goods imports in the Cultural and Natural Heritage domain were low, while they were negligible in the Design and Creative Services domain during 2001 to 2024.

Finally, the results for Sports and Recreation from 2021 to 2024 indicate an upward trend, showing that cultural goods imports for this domain continued to grow from about US\$39 million in 2021 to US\$69 million in 2024.

Figure 15: South Africa's cultural goods imports by domain 2001-2024 (US\$ millions)

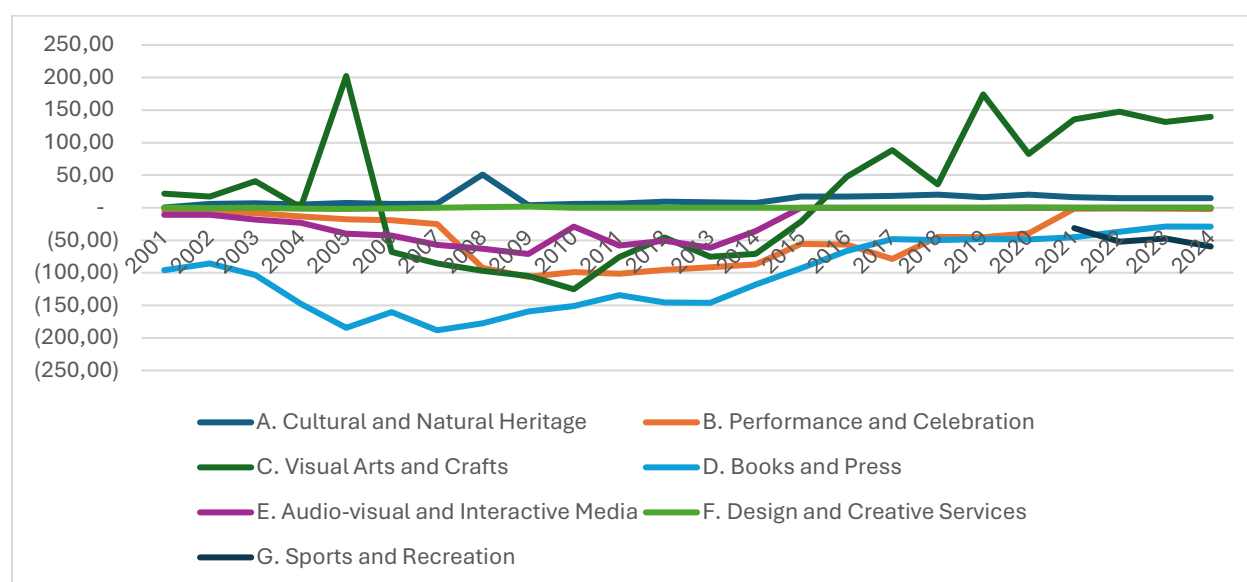


Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

Figure 16 below presents the trends in the trade balance by domain over the period 2001 to 2024. The analysis of trade balances across domains is essential, as it determines which domains dominate cultural goods exports. According to the graph, the Visual Arts and Crafts domain accounted for a significant share of cultural goods trade, with trade surplus peaking at US\$202 million in 2005, indicating that exports outweigh imports. This reflects a stronger international demand for South Africa's cultural products. However, it is worth noting that the Visual Arts and Crafts trade surplus declined sharply from 2006 to 2015 (i.e., from US\$67 million to US\$21 million), then recovered to US\$174 174 in 2019 and US\$139 million in 2024. Thus, further diversification and export promotion in this domain seem warranted.

On the other hand, the Books and Press and Performance and Celebration exhibit a significant decline in trade balances. The results indicate that the Books and Press domain reported a trade deficit of US\$184 million in 2005, while Performance and Celebration reported a trade deficit of US\$109 million in 2009. For Books and Press, although cultural goods exports increased from 2017 to 2018 and again from 2019 to 2020, the trade balance remains marginally negative. The Audio-visual and Interactive Media domain experienced a decline between 2005 and 2016, which, according to SACO (2022), can be attributed to the removal of the "Video games" category from cultural trade, as well as a lack of data on the cinematographic film sub-category from 2011 to 2012. The Cultural and Natural Heritage and the Design and Creative Services exhibit a steady pattern over the period of study, ranging from about US\$1 million to US\$18 million. Finally, the Sports and Recreation domain is reported to have experienced a trade deficit, rising from approximately US\$31 million in 2021 to approximately US\$59 million in 2024.

Figure 16: South Africa's cultural goods trade balance by domain 2001–2024 (US\$ millions)



Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2001-2024

7.2. The origin and destinations of cultural goods trade

Tables 8 and 9 below depict the disaggregation of South Africa's cultural goods trade with top trading partners. The analysis provides the origin and destinations of the country's cultural

goods for 2002-2024. Table 8 shows South Africa's dominant trading partners for its cultural exports. The results show that the US has the largest share of South Africa's cultural exports, ranging from approximately 44.28% in 2002 to 26.94% in 2024. Despite this decline, the US remains the leading destination for South Africa's cultural exports. The UK was the second-largest destination for South Africa's cultural exports in 2002, with a 12.39% share, before plummeting to seventh position in 2010. It subsequently moved from seventh place in 2010 (5.27%) to third place in 2018 (5.45%), 2019 (8.19%), and 2020 (7.05%). The decline in the UK's share of cultural goods exports is due to the aftereffects of the global financial crisis, which delayed South Africa's economic recovery. According to Salamat and Ali (2023), the further decline in the UK share from 2018 to 2020 was driven by the UK's exit from the European Union (EU). This decision adversely affected the trade prospects of many developing economies that depended on the UK market for their exports, including South Africa. Furthermore, the UK's exit from the EU meant it was no longer part of EU trade agreements, creating significant challenges for countries that relied on preferential access to the UK market.

Furthermore, in 2002 and 2010, China did not feature among the top twenty export destinations for South Africa's cultural products; however, in 2018 and 2019, China became South Africa's second-largest destination for cultural goods exports, with shares of 21.89% and 8.74%, respectively. The periods following 2020 indicate that China no longer features in the top twenty export destinations up to 2024.

Table 8 further indicates that Namibia and Botswana accounted for a significant share of South Africa's cultural goods exports in the period under study. In 2010, Namibia's share of cultural goods exports was 12.68%, placing it as South Africa's second-largest trading partner in cultural goods. In subsequent years, Namibia's share fluctuated, ranking fifth with 4.28% in 2018 before increasing to second place at 15.51% in 2024. Similarly, Botswana's share in cultural goods exports increased from 2.62% (eighth place) in 2018 to 13.32% (third place) in 2024. As noted by Salani and Tapfuma (2025), as countries in Africa increase the accessibility and availability of AI, cultural goods exports and imports have improved.

Furthermore, the results show that the SADC region accounts for a significant share of South Africa's cultural goods exports. In 2002, the top twenty destinations for South Africa's cultural goods exports included Zambia, Malawi, Zimbabwe, Mauritius, Mozambique, and Angola, which accounted for a total share of 11.12%. In 2010, Angola emerged as a key partner, accounting for 10.3%. Similarly, Angola ranked as the second-largest trading partner, accounting for 9.96% in 2020. According to UNCTAD (2023), the rapid adoption of digital tools for the production and publication of cultural content has opened new opportunities for the emancipation of creators dependent on publishers and producers. As such, digitisation has increased demand for South Africa's cultural goods in countries such as Angola, contributing to the rise in cultural goods exports shown in Table 8 below. Notably, Nigeria, despite not being an SADC trading partner, was listed among the top ten, with a share of 1.95% in 2002. Furthermore, Namibia, Botswana, Eswatini and Lesotho form part of the Southern African Customs Union (SACU) and have contributed significantly to the increase in South Africa's cultural goods exports. Accordingly, the share of cultural goods exports to these trading partners ranges from 10.78% to 40.86%.

Germany, France, Switzerland, and the Netherlands are part of the European markets and have contributed significantly to the growth of South Africa's cultural goods exports. Thus, Cattaneo and Snowball (2020) argue that South Africa should leverage the Economic Partnership Agreement with the EU to promote cultural goods exports to European markets. Lastly, the top twenty cultural goods export trading partners list does not include Middle Eastern and North African economies. This is because these markets offer underutilised growth prospects and a diverse range of cultural goods exports (Cattaneo and Snowball, 2020).

Table 8: Percentage share of top twenty partners in South Africa's cultural goods exports, selected years

2002		2010		2018		2019		2020		2021		2022		2023		2024	
USA	44,2 8	USA	16,8 5	USA	32,0 6	USA	37,4 1	USA	45,7 2	USA	24,4 9	USA	21,8 4	USA	20,3 9	USA	26,9 4
UK	12,3 9	Namibia	12,6 8	China	21,8 9	China	8,74	Angola	9,96	Namibia	12,2 1	Namibia	13,1 3	Namibia	12,0 2	Namibia	15,5 1
Israel	6,66	Angola	10,3	UK	5,45	UK	8,19	UK	7,05	Botswana	10,4 9	Botswana	11,3 6	Botswana	10,8 1	Botswana	13,3 2
Zambia	3,53	Botswana	7,15	Namibia	4,28	Netherlan ds	5,15	Namibia	3,66	Lesotho	7,03	Zimbabwe	9,14	United Arab Emirates	9,32	Zambia	8,22
Australia	3,5	Eswatini	6,6	Germany	3,79	Namibia	4,16	Botswana	3,27	Eswatini	4,98	Lesotho	5,98	Zimbabwe	8,83	Zimbabwe	7,51
Netherlan ds	2,3	Zimbabwe	6,34	Zimbabwe	3,08	Germany	3,95	Eswatini	2,6	Zambia	4,96	Zambia	5,54	Zambia	6,13	Eswatini	6,43
Germany	2,25	UK	5,27	Eswatini	2,65	Botswana	3	Germany	2,4	Zimbabwe	4,09	Eswatini	5,45	Eswatini	5,63	Lesotho	5,60
Malawi	2,02	Lesotho	4,16	Botswana	2,62	Eswatini	2,73	Lesotho	2,02	Mozambiq ue	3,42	United Arab Emirates	3,82	Lesotho	4,95	Mozambiq ue	4,81
Nigeria	1,95	Mozambiq ue	3,31	Switzerlan d	2,1	Zimbabwe	2,33	Zimbabwe	1,7	Congo, Democrat ic Republic of the	2,92	Mozambiq ue	3,54	Mozambiq ue	3,66	Congo, Democrat ic Republic of the	3,49
Zimbabwe	1,88	Zambia	2,64	DRC	1,64	France	1,87	Switzerlan d	1,68	United Kingdom	2,81	Congo, Democrat ic Republic of the	3,43	Congo, Democrat ic Republic of the	3,01	Malawi	2,49
Mauritius	1,67	Germany	2,4	Zambia	1,61	Lesotho	1,84	Zambia	1,49	Malawi	1,72	United Kingdom	2,45	Malawi	2,31	United Kingdom	2,12
Canada	1,67	Malawi	1,61	Italy	1,43	Zambia	1,52	France	1,43	Germany	1,45	Malawi	2,22	United Kingdom	1,72	United Arab Emirates	1,83

France	1,37	Kenya	1,44	Australia	1,34	Mozambique	1,09	Mozambique	1,39	Australia	1,45	Ghana	1,46	Angola	1,04	Netherlands	1,08
Mozambique	1,29	Australia	1,28	Mozambique	1,34	Australia	1,04	UAE	1,22	Ghana	1,38	Hungary	1,20	Germany	0,85	Angola	0,98
Uganda	1,11	UAE	1,27	France	1,29	Nigeria	1,04	Uganda	1,04	Switzerland	1,04	Australia	1,12	Ghana	0,76	Tanzania, United Republic of	0,98
Italy	0,82	Switzerland	1,25	Lesotho	1,24	UAE	1,03	Australia	0,95	Angola	0,89	Tanzania, United Republic of	0,93	Tanzania, United Republic of	0,73	Ghana	0,97
Bahamas	0,79	France	0,96	Canada	0,99	Canada	1,02	Tanzania	0,91	France	0,89	Germany	0,91	Netherlands	0,67	Hungary	0,87
Angola	0,73	Congo	0,95	UAE	0,9	Angola	0,97	Netherlands	0,84	Belgium	0,82	Angola	0,91	Australia	0,63	Mauritius	0,81
UAE	0,62	Tanzania	0,93	Angola	0,89	DRC	0,96	Belgium	0,79	Mauritius	0,69	Netherlands	0,76	Mauritius	0,61	Australia	0,64
Kenya	0,59	Netherlands	0,87	Malawi	0,8	Switzerland	0,93	Denmark	0,74	Netherlands	0,61	Mauritius	0,69	Hungary	0,53	Germany	0,63
South Africa's total cultural goods exports in US\$ million																	
World	112,59	World	248,41	World	448,86	World	381,96	World	316,46	World	313,94	World	296,25	World	278,46	World	303,66

Source: SARS Customs Data, Quantec Trade Records & UN Comtrade, 2002-2024

Table 9 below depicts the share of cultural imports with key trading partners. According to the analysis, China, the UK, and the US are South Africa's leading trading partners in cultural imports. In 2002, the UK's share of cultural imports was the largest at 29.11%, followed by the US's at 16.27%. During the same period, China accounted for about 6.17% of South Africa's cultural imports. In subsequent years, China had positioned itself as South Africa's key source of cultural imports with shares of 23.60% in 2010, 36.41% in 2018 and 40.71% in 2020. However, it is evident that COVID-19 adversely affected the share of cultural imports from China, as it declined to 15.32% in 2021, 14.21% in 2022, and 12.52% in 2023. As the economy recovered from the pandemic's adverse effects, so did China's share of the country's cultural imports, rising sharply to 30.08% in 2024. Although the UK was the primary source of cultural goods imports into South Africa in 2002 with a share of 29.11%, it has since held second place from 2010 to 2020, after which its position worsened to fifth and sixth place from 2021 to 2024.

Other countries with a significant influence on South Africa's cultural imports include Italy, Germany, France and Ireland. France's share of cultural imports in 2002 was 11.5%, ranking France third, while Ireland's share of cultural imports in 2010 was 4.62%, making it the fourth-largest source of cultural imports. In addition, Italy ranked as the fourth-largest source of cultural imports in 2019 and 2020, at 4.09% and 3.88%, respectively. In Africa, eSwatini is among the top ten sources of cultural imports in 2010, 2018, and 2019. However, in 2020, the results show that its share declined, moving it to the eleventh position; thereafter, eSwatini did not feature in the top 10 list. According to Mabundza (2020), this trend is attributed to eSwatini's economy contracting by about 0.9% due to challenges triggered by the COVID-19 pandemic. Consequently, eSwatini reduced the volume of exports to its trading partners, including South Africa. Botswana ranked among the top twenty sources of cultural imports in 2010, 2018, and 2019.

Similarly, significant contributions to South Africa's cultural imports from countries such as Japan, Hong Kong, India, Thailand, Malaysia and Indonesia are noteworthy, as per Table 9 below. India's share in cultural imports increased from 1.34% in 2002, when it ranked 14th, to approximately 2.78% in 2024, placing it in fifth place. The data in the table indicate that no Latin American country is a significant trading partner with South Africa, as none appear among the top 20 sources of South Africa's cultural imports.

Table 9: Percentage share of top twenty partners in South Africa's cultural goods imports, selected years

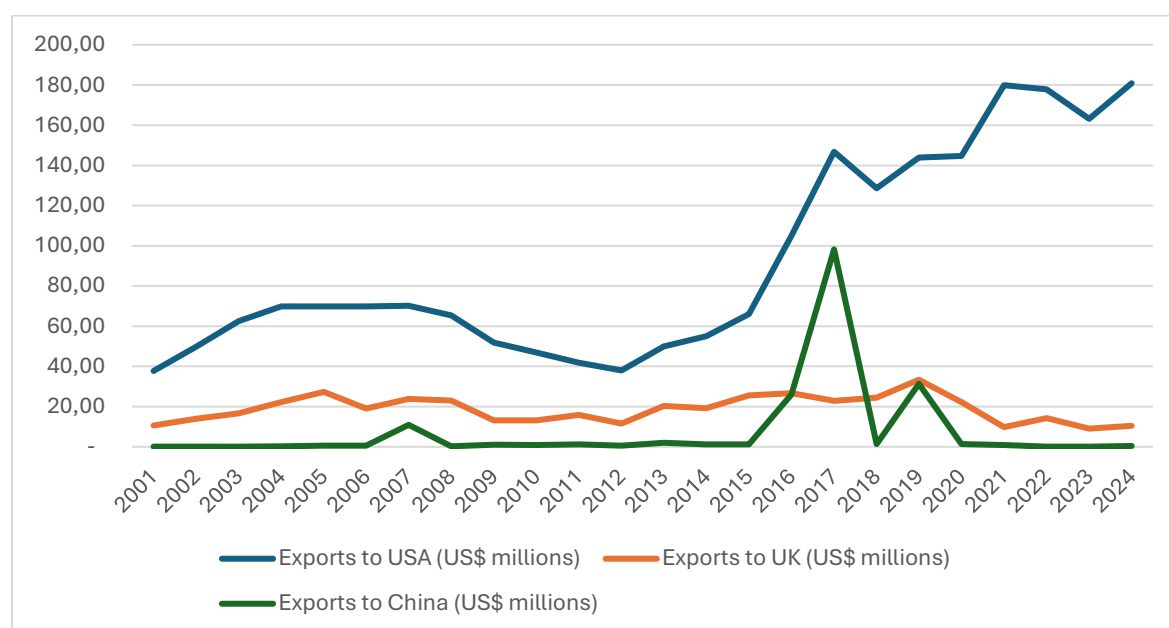
2002		2010		2018		2019		2020		2021		2022		2023		2024	
UK	29,11	China	23,6	China	36,41	China	36,59	China	40,71	USA	24,31	USA	42,73	USA	40,79	China	30,08
USA	16,27	UK	20,6	UK	11,87	UK	13,74	UK	12,86	China	15,32	China	14,21	China	12,52	USA	21,96
France	11,5	USA	11,31	USA	8,04	USA	8,55	USA	9,16	Switzerland	14,96	South Africa	4,42	Italy	2,00	Italy	4,03
China	6,17	Ireland	4,62	Italy	3,34	Italy	4,09	Italy	3,88	South Africa	8,02	Italy	1,88	South Africa	1,53	France	3,00
Italy	4,3	Eswatini	3,35	Thailand	3	India	2,94	Taipei, Chinese	3,5	United Kingdom	6,44	United Kingdom	1,68	France	1,45	India	2,78
Japan	3,9	Italy	3,2	India	2,93	Germany	2,92	India	3,17	Italy	2,23	France	1,47	United Kingdom	1,27	United Kingdom	2,73
Taipei, Chinese	3,21	India	2,9	Eswatini	2,76	Taipei, Chinese	2,24	Germany	2,9	Germany	1,93	India	1,45	India	1,26	Mozambique	2,10
Germany	2,76	Germany	2,51	Germany	2,5	Thailand	2,15	Malaysia	2,8	France	1,73	Mozambique	1,05	Mozambique	1,03	Germany	1,73
Australia	2,31	Hong Kong	2,48	Taipei, Chinese	2,16	Japan	2,1	Japan	2,14	India	1,67	Germany	1,00	Germany	0,82	Spain	1,56
Hong Kong	2,3	Taipei, Chinese	2,47	Japan	1,94	Eswatini	1,96	Thailand	2,11	Mozambique	1,35	Spain	0,84	Spain	0,71	South Africa	1,45
Spain	1,84	Thailand	2,44	South Korea	1,69	Malaysia	1,74	Eswatini	1,74	Spain	1,11	Viet Nam	0,62	Switzerland	0,50	Viet Nam	1,21
Ireland	1,57	Japan	2,39	France	1,5	Hong Kong	1,38	Ireland	1,16	Malaysia	0,80	Thailand	0,45	Viet Nam	0,45	Thailand	0,88
Singapore	1,35	Norway	2,15	Hong Kong	1,44	South Korea	1,06	Botswana	1,1	Belgium	0,66	Indonesia	0,41	Indonesia	0,36	Switzerland	0,83
India	1,34	Singapore	1,29	Netherlands	1,11	France	1,03	South Korea	0,97	Viet Nam	0,60	Malaysia	0,38	Thailand	0,35	Indonesia	0,80
Netherlands	1,23	South Korea	1,29	Hungary	1,05	Indonesia	1,02	Indonesia	0,8	Zambia	0,56	Belgium	0,33	Poland	0,29	Poland	0,68
South Korea	1,14	Switzerland	1,28	Malaysia	1,04	Botswana	0,97	Hong Kong	0,78	Poland	0,51	Austria	0,33	Belgium	0,28	Brazil	0,66
Thailand	1	Mauritius	1,05	Indonesia	0,94	Czech Rep.	0,84	France	0,77	Thailand	0,51	Netherlands	0,32	Zimbabwe	0,26	Türkiye	0,62
Switzerland	0,85	Indonesia	0,99	Botswana	0,92	Switzerland	0,82	Switzerland	0,55	Indonesia	0,45	Poland	0,32	Türkiye	0,25	Belgium	0,55
Indonesia	0,84	Sweden	0,87	Philippines	0,81	Mexico	0,76	Singapore	0,45	Zimbabwe	0,42	Brazil	0,28	Malaysia	0,25	Pakistan	0,49

Turkey	0,67	Netherlan ds	0,78	Switzerla nd	0,73	Ireland	0,59	Netherlan ds	0,38	Türkiye	0,39	Türkiye	0,28	Brazil	0,24	Austria	0,47
South Africa's total cultural goods imports in US\$ millions																	
World	200,5 2	World	591,6 5	World	473,2 3	World	394,7 4	World	257, 8	World	240,3 4	World	224,2 4	World	209,0 2	World	239,4 3

Source: SARS Customs Data, Quantec Trade Records and UN Comtrade, 2002-2024

Figure 17 below presents South Africa's cultural exports to the US, UK and China for the period 2001 to 2024. The graph depicts that the US market is the dominant destination for South Africa's exports. The data further show that cultural exports to the US first reached a peak in 2017 at approximately US\$146 million and, in 2021, reached a significant peak at approximately US\$179 million. Cultural exports to the US, UK, and China did not significantly decline during the COVID-19 period. According to UNESCO (2021), this trend is caused by the accelerated adoption of digital platforms, which continued cultural production during the pandemic. Furthermore, COVID-19 led to cultural production, distribution, and consumption taking place online. Virtual cultural events mitigated the impact of physical restrictions, enabling South Africa to increase its cultural exports without additional costs. On the other hand, a stable trend is evident in cultural exports to the UK over the period of 2001 to 2024. At the same time, cultural exports to China exhibit a flat trend from 2001, at approximately US\$5 million, until a slight increase in 2007 (about US\$11 million). In addition, a spike in 2017 occurred, with cultural exports recorded at approximately US\$98 million. According to SACO (2022), this spike is due to a once-off increase in HS code 970600 ("Antiques of > 100 years old") in 2008 and increases in HS code 711319 ("Articles of jewellery and parts thereof, of precious metal other than silver") in 2017. Subsequently, from 2018 to 2024, a declining trend is evident in cultural exports to the UK and China; however, a continued upward trend is evident in cultural exports to the US.

Figure 17: South Africa's cultural goods exports to the USA, UK and China 2001–2024 (US\$ millions)

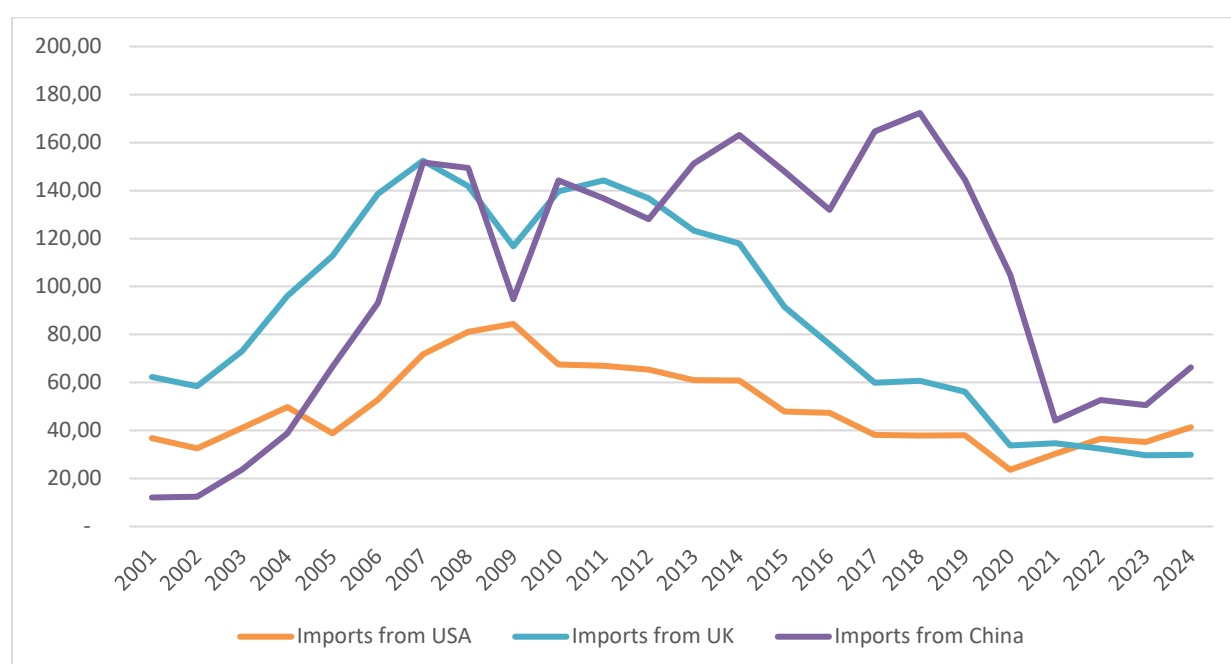


Source: Author's computations based on TradeMap, 2001-2024

Figure 18 presents the cultural goods imports from the USA, the UK and China for the period 2001–2024. The data indicates that South Africa largely imports cultural goods from China. While the UK has been the leading trading partner for cultural imports, China overtook it in 2014, with imports reaching approximately US\$163 million. In contrast, UK cultural imports in 2014 were about US\$117 million. In addition, a sharp increase is observed in 2018, with cultural imports from China at approximately US\$172 million. According to Borojo and Weimin (2025), this is attributed to rapid digitisation and early use of AI tools in the production and

distribution of cultural goods and services. Accordingly, in China, these advances resulted in lower production costs and increased cultural goods exports. As such, the volume of cultural goods imports from China increased significantly in South Africa. However, a sharp decline in 2021 is attributed to the COVID-19 pandemic. This resulted in cultural goods imports from China falling to approximately US\$44 million. The graph also shows that the UK was a more significant source of imports than the US throughout the 2001 to 2024 period. Imports from the UK and the US both declined in the 2010s. All three of the import series were affected to some extent by the statistical reallocation of the “Video games” category (in 2012–2013 in Figure 16), but this did not appear to affect cultural goods imports from China to a great degree, as they still increased in the 2012–2013 period.

Figure 18: *South Africa’s cultural goods imports from the USA, UK and China 2001–2024 (US\$ millions)*



Source: Author’s computation based on TradeMap, 2001-2024

8. Conclusions

Tracking developments in the CCI&S over more extended periods is crucial to understanding the creative economy and how it has fared over time. Chapter 5 of the Mapping Study provides a longer-term analysis of the CCI&S's contribution to South Africa's GDP, employment, transformation, and international trade in cultural goods. Data are from a variety of national and international databases that provide reliable, longitudinal national data (further described in Chapters 1, 2, and 3 of the Mapping Study).

When assessing the contribution of the CCI&S to South Africa's GDO per domain for the period 1993 to 2023, the results indicate that the contribution to GDP has increased significantly since 1993, especially from the commercial application domains of Design and Creative Services, Books and Press and Audio-visual and Interactive Media. However, sluggish growth is observed in the domains of Cultural and Natural Heritage and Performance and Celebration. The report notes that the Sports and Recreation domain was not measured or disaggregated in CCI&S datasets before 2021. Data from 2021 to 2023 shows that the contribution of the Sports and Recreation domain has continued to grow.

Furthermore, the examination of cultural occupations for the period 2008 to 2024 reveals that, before the global financial crisis, cultural occupations accounted for approximately 475,000 jobs and made up 3.2 % of the workforce. In 2009, the number of cultural occupations dropped to about 378,000, and this downward trend continued until a peak in 2020, when it reached about 455,000. However, following the COVID-19 pandemic, the number and percentage of cultural occupations fell significantly in the period 2021-2023, reaching 374,000 and 2.3% respectively in 2023. A slight recovery is observed in 2024, with the number increasing to approximately 419,000, which is 2.5% of total employment.

Additionally, this chapter analysed trends in trade in cultural goods, as depicted by South Africa's cultural goods exports and imports from 2001 to 2024. The results indicate that cultural goods trade bounced back after the 2009–2010 crisis, following the global financial crisis, with imports increasing more rapidly than exports. Over the period studied, both exports and imports have fluctuated, influenced by events such as the COVID-19 pandemic. Despite economic shocks, the trend analysis indicates that trade in cultural goods has remained resilient. The same is evident in trends in cultural goods trade within total commodity trade for comparative purposes over the same period.

From 2001 to 2024, exports were dominated by the Visual Arts and Crafts domain, together with those from Books and Press. Exports of the Visual Arts and Crafts domain accounted for the largest share of cultural goods exports. The results indicate significant scope for further diversification of exports within the Visual Arts and Crafts and Books and Press domains. Though these domains remained dominant, it is essential to note that significant declines occurred during the global financial crisis and the COVID-19 pandemic. Furthermore, the Performance and Celebration domain contributed less to cultural goods exports than the other domains; however, there was notable export growth in Performance and Celebration during 2015–2019. On the other hand, the Cultural and Natural Heritage domain depicted steady but minimal export growth off a low base over the period under study. Finally, the Sports and Recreation domain shows insignificant growth from 2021 to 2024.

From the import's perspective, South Africa's cultural goods imports by domain for the period 2001 to 2024 show that Books and Press, together with Visual Arts and Crafts, were the dominant import domains. Visual Arts and Crafts imports fluctuated but remained relatively stable until 2018, when they began to decline more sharply. The Books and Press domain exhibited similar growth patterns until a sharp decline in 2014, followed by a period of decline. Likewise, Performance and Celebration was a significant domain for cultural goods imports during the 2006 to 2020 period; however, imports from this domain declined sharply thereafter to approximately US\$3 million in 2024. While other domains recovered significantly from the pandemic, the Audio-visual and Interactive Media failed to recover fully. In addition, imports in the Cultural and Natural Heritage domain were comparatively low over the period under study, whereas those in the Design and Creative Services domain were negligible. In addition, the Sports and Recreation domain from 2021 to 2024 shows that imports continued to grow, from about US\$39 million in 2021 to US\$69 million in 2024.

From a key partner's perspective, the analysis shows that South Africa's largest trading partner for its cultural goods exports over the last 20 years is the US, followed by the UK, although the latter is becoming less important over time. The importance of the African continent and China as export destinations for South African cultural goods is growing. Cultural goods imports are sourced primarily from the same three countries (the US, the UK, and China). China has the largest share of South African cultural goods imports, and its dominance is growing over time. While South Africa has a cultural goods trade surplus with the US over most of the period studied, it has a large and growing cultural deficit with China.

Finally, the chapter argues that the adoption of AI has introduced opportunities and challenges that have significantly transformed the South African creative industry. Technological developments, namely blockchain, artificial intelligence (AI), and Virtual and Augmented Reality (VR/AR), have redefined how creatives produce and distribute content and how consumers receive it. The use of AI tools in the creative industries has led to improved content creation, information extraction, data compression, and analysis. Creative content production has become relatively affordable, lowering entry barriers and enabling creatives to be more innovative and reach a wider audience, thereby improving their revenue streams. However, there are concerns linked to the rapid technological transformation, such as the use of NTFs and AI, which invite scrutiny of digital ownership, intellectual property, and ethical considerations of AI-generated art. Moreover, traditional roles such as illustrators, sound engineers and stage technicians are at risk of being displaced due to the significant adoption of automation and generative technology. The impact of rapid transformation calls for policy interventions that emphasise the importance of incorporating data reflecting South African local cultural identities, such as languages, and for collaboration between the government, academia, creative communities, and the private sector to promote inclusive innovation ecosystems and sustain the creative industry. By adopting these strategic actions, South Africa will position itself as a supporter and promoter of an ethical, inclusive and sustainable creative economy.

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