south african cultural observatory

Measuring and valuing South Africa's cultural and sport economy

Research Report

Chapter 4: Quarterly Insights: Key Performance Economic Indicators

Submitted to:
Department of Sports, Arts and Culture

Submitted by:
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South African Cultural Observatory

Report

Quarterly Trade and Employment

March 2024

Executive Summary

The cultural and creative industry (excluding sports)[1] makes significant contribution in the global economy. The sector more than doubled between 2002 and 2011 with an overall average annual growth rate of 8.8% (UNESCO, 2013). The share of cultural and creative industry (CCI) in developing countries has grown steadily, with export growth rates between 2002–2011 averaging 12.1% annually (UNESCO, 2013). Cultural and creative industries make a significant contribution to the world economy accounting for 3.1 per cent of global gross domestic product (GDP) (UNESCO, 2022). According to UNCTAD, the creative goods and services sector represented 3 and 21 per cent of total merchandise and services exports respectively in 2020 (UNCTAD, 2022). In addition, excluding sports, cultural and creative industries provide 6.2 per cent of all employment generating nearly 50 million jobs worldwide, three times as many as the global automotive industry, although these are short time and low paid (UNESCO 2022).

The Global sports industry on its part grew with more than 7% between 2009 and 2013, totalling to some USD80 billion in 2014 (Kearney, 2014). In just a decade, the global sports industry is now estimated to be worth US $ 512 billion in 2023 and is projected to grow to US$ 624 billion in 2027 (BRC, 2023). Hosting international sports events such as the Olympics, FIFA World Cup, or the Super Bowl contribute to significant economic development in countries particularly in promoting foreign capital inflows and generating both local and international employment opportunities (Yehyia, 2018).

On methodologies, in general, cultural and creative employment is often underestimated in official statistics for a number of reasons. Often only activities and occupations in cultural and creative domains are measured. However, cultural and creative workers can be employed in non-cultural and creative sectors (e.g., designers working in automotive industries). In addition, labour force surveys include a respondent's main paid job but do not always capture secondary employment, which is highly relevant to work in CCI&S. It is also important to note that the sector includes high shares of volunteers or those who engage in cultural production outside of remunerated work. This accounts for a considerable share of unpaid work that is not captured by national accounting systems. They are sometimes included in cultural participation statistics but not in employment figures (OECD, 2022).

Turning to employment, in 2021, the total CCI&S employment (including both cultural and non-cultural support jobs in the CCI&S) in South Africa was 7.2% per cent of total jobs,- accounting for 1.05 million jobs (Stats SA 2023). This percentage is lower than the global employment of individuals in the creative economy of 8.2 per cent.

While not yet representative of the population demographics, there is some evidence that people working in cultural occupations in South Africa are becoming more diverse. Nationally, the industry employs a large proportion (70%) of Africans/Blacks, followed by Coloureds at 9%, Indians at 4% and Whites at 17%. This is a slight shift from the 2020 position, where 86% of those in cultural occupations were black (made up of 73.2% Africans, 9.3% "coloured1 " people; and 3.3% people of Indian/Asian origin), white people 14 per cent, although whites represent less than 10% of the population (Hadisi & Snowball, 2019). Approximately 33.5 per cent of the employees in this industry are youth, with male youths accounting for 58.7 per cent while women for 41.3 per cent.

In terms of GVA, on a provincial level, Gauteng has maintained the highest contribution followed by KZN, Western Cape, then Eastern Cape. Different provinces record different dominant domains. In Gauteng and Western Cape, the highest contributor is the design and creative domain, while in

[1] Most of the global data on Cultural and Creative Industries exclude Sports.

KwaZulu Natal the dominant domain in GVA terms is sports and recreation. There is a general consistency in the quarterly data in terms of the high and the low GVA contributors.

Turning to the metro's, in harmony with the foregoing, Gauteng's City of Johannesburg had the highest GVA at R7.2 billion. The least consistent contributor is Buffalo City followed by both Nelson Mandela Bay and Mangaung. Through 2021, the growth of these metros has been negligible.

Quarterly trade is generally concentrated in the three provinces: Gauteng, Westen cape and KwaZulu Natal. This is consistent with employment and GVA trends. A similar observation is made with trade at metro level, where the metros that are located in the top three provinces contribute the largest share of trade in the CCI&S.

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Abbreviations

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

1. BACKGROUND

1.1. Introduction

According to UNESCO (2013), the cultural and creative industry (CCI) [excluding sports] was the most rapidly growing sector in the world, in 2013 (UNESCO, 2013). World trade of creative goods and services more than doubled between 2002 and 2011 with an overall average annual growth rate of 8.8% (UNESCO, 2013). The developing country share of cultural creative industry has grown steadily, with export growth rates between 2002–2011 averaging 12.1% annually (UNESCO, 2013). A more recent UNESCO report (2016) shows that the world flow of cultural trade doubled between 2003 and 2014, despite the 2008/9 financial crisis. Cultural and creative industries make a significant contribution to the world economy accounting for 3.1 per cent of global gross domestic product (GDP) (UNESCO, 2022). According to UNCTAD, the creative goods and services sector represented 3 and 21 per cent of total merchandise and services exports respectively in 2020 (UNCTAD, 2022). In addition, cultural and creative industries provide 6.2 per cent of all employment generating nearly 50 million jobs worldwide, three times as many as the global automotive industry, although these are short time and low paid (UNESCO 2022).

Internationally, CCI&S rank among the four sectors of the economy with the highest employment of women. In total, this sector employs nearly 50 million people worldwide. They employ more young people (age group of 15–29-year-olds) than any other sector (UNESCO, 2022). These factors place creative industries as crucial sectors for the achievement of the 2030 Sustainable Development Goals (SDGs) agenda. Infact, forecasts predict that it's economic impact is also expected to triple by 2030, thus accounting for ten per cent of global GDP (UNCTAD, 2022). Although the cultural and creative industries have enormous social and economic potential, this often remains untapped. There is a lack of government support, lack of needs-based training, lack of effective advocacy groups, lack of appropriate funding and poor market access for creative professionals. Structural challenges include low wages, a lack of social protection, limited (and sometimes absent) copyright protection and insufficient diversity in managerial positions.

Within South Africa, the CCI&S plays a notable role in employment (6 per cent of total jobs in the country). This compares unfavourably with 8.2 per cent globally. Most of the labor force in the CCI&S are youth (58.7%) and women 41.3%). The sports industry on its part constitutes of some major players such as Boxing South Africa; South African Institute for Drug-Free Sport (SAIDS); South African Sports Confederation and Olympic Committee and World Anti-Doping Agency (WADA).

The Sport and Recreation sector on its part is defined as all forms of physical activity that contribute to physical fitness, mental well-being and social interaction, such as play, recreation, organised or competitive sport, and indigenous sports and games' (UN Inter-Agency Task Force on Sport for Development and Peace, 2008)

Sports is a key sector of economic activity and spans medical treatment and rehabilitation, research and development, sports tourism, sales and trade of sport products, construction and maintenance of sports venues, organisation sports events, and marketing and advertising. It also creates various job and business opportunities (e.g., engineers and developers, coaches and sport doctors, sport journalists and commentators, retailers of sports goods and equipment, etc.). It is also part of the increasingly important leisure industry and as such, has broader benefits such as boosting productivity, individual and community development as well as reducing the burden of ill health on society.

The Global sports industry on its part grew with more than 7% between 2009 and 2013, totalling to some USD80 billion in 2014 (Kearney, 2014). In just a decade, the global sports industry is now estimated to be worth US $ 512 billion in 2023 and is projected to grow to US$ 624 billion in 2027 (BRC, 2023). Hosting international sports events such as the Olympics, FIFA World Cup, or the Super Bowl contribute to significant economic development in countries particularly in promoting foreign capital inflows and generating both local and international employment opportunities (Yehyia, 2018). In 2019, 1.37 million people (54 per cent male and 46 per cent female) were engaged in the field of sports in the EU. This was an increment of 17 Per cent from 2014 (Eurostat, 2021). The share of young people aged 15–29 was 35 per cent twice the share observed in overall employment, while the 30–64 age group accounted for 63 per cent (Eurostat 2021). Africa's expected sports business growth is driven by a young population and the emergence of globally successful athletes in several sports including football, basketball, and boxing (ASCI, 2020).

Key sporting codes in South Africa include, among others: Athletics; Biking; Mountain Biking; Cycling; Boxing; Cricket; Canoeing; Rowing; Golf; Hockey; Ice Hockey; Motorsport; Flying; Netball; Rugby; Running (including South Africa's two world-renowned ultra-marathons – the Comrades Marathon in KwaZulu-Natal and the Two Oceans Marathon in the Western Cape); Soccer; Surfing; Sailing; Swimming; Tennis, and Chess. South Africa will host the Netball World Cup in 2023, in Cape Town. This is a historic first for the sport in Africa.

1.2. Aims Scope and Limitations

This chapter provides an in-depth analysis of the quarterly trends in the Cultural, Creative and Sports industries. The analysis is in terms of employment, GVA and trade contribution of the creative, cultural industry and sports in South Africa. This objective is achieved through a necessary contextualising of the CCI&S on a global as well as continental level, along with rationale for the growing role of the sector in the global, continental, and South African trade. Due to data variances, the analysis for employment covers the period 2021Q1 to 2023Q4, GVA analysis is for 2021Q to 2021Q4 and trade analysis cover 2021Q1 to 2022Q4.

Notably, data on the sports industries on global, African and in South Africa is limited. This is due to the clustering norm of creative industries, which excludes the sports sector. Although this report makes efforts to combine data where available, the omission of sports in several aspects of analysis is deliberate, considering the lack of data. Where applicable, sports data is analysed separately.

The chapter further offers an analysis of the social demographics of the dynamics of labour force who work in the CCI&S sector. The impact of the COVID-19 pandemic on cultural, creative and sports trade flows and post Covid-19 trade performance is also presented.

1.3. Methodology

The data used in this chapter to understand the trends and patterns of CCI&S in South Africa was derived from a range of sources, namely, Statistics South Africa (mainly Quarterly Labor Force Surveys), Statista, Quantec data and SARS. These data sources are summarised below.

This chapter mainly utilised Statistics South Africa's Quarterly Labor Force Survey (QLFS), which gathers quarterly labor market information in all sectors in South Africa. The QLFS targets individuals over 15 years but under 64 years, who reside within South Africa. It should be noted that QLFS data prior to March 2020 was exclusively conducted face to face, but on the onset of Covid-19, Statistics South Africa adapted the methodology to Computer- assisted Telephone Interviewing (CATI) for the QLFS data collection for Q2: 2020 to Q4: 2021. The CATI system recorded notable decline on response rate, to 44.6% in quarter 4 of 2021. The methodology reverted again to face to face, in quarter 1 2022.

For each quarter of the QLFS, a quarter of the sampled dwellings are rotated out of the sample. These dwellings are replaced by new dwellings from the same PSU or the next PSU on the list. The QLFS is approximately 30 000 dwellings divided equally into four rotation groups, i.e. 7 500 dwellings per rotation group. The QLFS uses a Master Sample which comprises of Enumeration Areas (EAs) that are drawn from across the country. The sample is designed to be representative at the provincial level and within provinces at the metro/non-metro level. Within the metros, the sample is further distributed by the following geography types: urban formal, urban informal, farms and tribal. The sample for the QLFS is based on a stratified two-stage design with probability proportional to size (PPS) sampling of PSUs in the first stage, and sampling of dwelling units (DUs) with systematic sampling in the second stage.

The Quantec data, which is also utilised in this study, is produced by a private company, which compiles data through a standardised input-output framework, with specific industry and national account indicators. In this regard, Quantec provides a systematic set of standardised industry time-series and industry-by-industry analytical input-output tables for South Africa. More particularly, the data contains input, output, capital and labour utilisation structure of each industry. Quantec's trade module includes origin and destination of imported and exported goods, on a detailed commodity and industry level. Such detail was useful for understanding trade and employment data in the creative economy. The trade data features quarterly and annual trends, and reflects national, provincial and district levels.

Thirdly, South African revenue Services (SARS) data was also used in the study, particularly on imports and exports records. SARS trade data is extracted from the Customs data on Customs Clearance Declarations (CCDs) submitted for importation and exportation. The data is then subjected to internal verification and analysis processes with the aim to identify and correct anomalies in trade figures during the preparation of the final trade statistics, which are published on the SARS website.

Finally, among other sources, the analyses supplemented the above data with more data from (a) Statista, -which includes combinations of sourcing, processing, modelling and forecasting and (b) UNCTAD which maintains the largest global databases on Foreign Direct Investment (FDI) and Transnational Corporations (TNCs) FDI and TNC activities.

To maintain linkages with historical mapping reports, the study matched the identifier codes for the creative industry used by UNESCO with those used by Statistics South Africa and Quantec. There are slight deviations, which should be understood and accounted for in interpreting and comparing datasets from these various sources. UNESCO uses the following seven codes:

1. Cultural and Natural Heritage
2. Performance and celebration
3. Visual Arts and Crafts
4. Books and Press
5. Audio-visual and Interactive media
6. Design and Creative Services and
7. Intangible Cultural Heritage (Education and training, Archiving and preservation and Equipment and supporting materials)

UNESCO’s identification also includes what it refers to as ‘related domains’, which are, tourism and sports and recreation. This coding does match with the current mapping objective, which aims to map cultural and creative industry *and* sports. However, the seventh code, -intangible cultural heritage, is *not* captured in Quantec codes as it is by UNESCO. In the same light, Quantec captures Sports and Creation as a main code, while UNESCO captures Sports and Recreation as *a related domain* along with tourism. Notwithstanding the identity of the Quantec codes, there is no available data on three domains, -namely, (a) the Audio-visual and Interactive Media (b) Design and Creative Services and (c)Sports and Recreation. The unavailability of data in these three domains presented a challenge in reporting, -particularly on Sports and Recreation which for the first time was a key objective in the current mapping study. The report was circumspect in using data from different other sources, given that this had the potential to introduce inaccuracies, considering the full scope of data captured by different sources in each domain.

Statistics South Africa (Stats SA) on its part categorises industries into ‘sections’ in which case the creative industry is section R, which covers *Arts, entertainment and recreation*. Stats SA does not capture the creative industry domains like UNESCO or Quantec does, it rather employs activity-based approach, which is mainly (but not exclusively) focused on cultural participation, rather than real trade or unemployment. The Stats SA identifies the following seven activities.

(a) production of live theatrical presentations, concerts and opera or dance productions and other stage productions:
    - activities of groups, circuses or companies, orchestras or bands
    - activities of individual artists such as authors, actors, directors, musicians, lecturer or speakers, stage-set designers and builders, etc.
(b) operation of concert and theatre halls and other arts facilities,
(c) activities of sculptors, painters, cartoonists, engravers, etchers, etc.
(d) activities of individual writers, for all subjects including fictional writing, technical writing, etc.
(e) activities of independent journalists, and
(f) restoring of works of art such as paintings, etc.
(g) activities of producers or entrepreneurs of arts live events, with or without facilities.

The above activities are captured separately from *Libraries, archives, museums and other cultural activities* which is captured as division 91, Gambling and betting activities which are captured as Division 92, and Sports activities and amusement and recreation activities which are captured as Division 93.

These anomalies explain why, in general, cultural creative and sporting employment is often underestimated or overestimated in official statistics. Comparing these data should always be employed with caution, particularly in a study which seeks to establish patterns and trends. It should also be acknowledged that globally and in South Africa, refining of measurements of the creative industry is work in progress, and therefore the divergences are not unique to South Africa. In effect, sometimes only activities and occupations in cultural and creative sectors are measured. As part of the refinement, however, it is important to note that cultural and creative workers can be employed in non-cultural and creative sectors (e.g., designers working in automotive industries). In addition, labour force surveys (already discussed above) include a respondent’s main paid job but do not always capture secondary employment, which is highly relevant to work in CCI. It is also important to note that the sector includes high shares of volunteers or those who engage in cultural production outside of remunerated work. This accounts for a considerable share of unpaid work that is not captured by national accounting systems. They are sometimes included in cultural participation statistics but not in employment figures (OECD, 2022).

This chapter made considerable efforts to balance the cautions related to the afore-noted CCI&S measurement discrepancies. To the extent necessary, the report makes in-text notes of the data divergences, as well as where there is no data available. The trade and employment data in particular relies heavily on Quantec as a source, as a means of maintaining consistency.

2. GLOBAL AND SOUTH AFRICAN CULTURAL AND SPORTS INDUSTRIES

2.1. Estimation of Global Employment in Cultural and Creative Occupations

Cultural, creative and sports occupations are defined as all individuals working directly in cultural and creative and sports sectors as well as indirectly, -that is, individuals working in occupations related to cultural creative and sports (CCI&S) yet outside the mainstream CCI&S sectors (Eurostat, 2018). Occupations in the CCI&S go beyond those employed directly in the industry to include those employed in cultural, creative and sports occupations in all sectors of the economy. Historically, statistics relating to occupations in the CCI&S considered only those directly employed by organisations classified as being in CCI&S (OECD, 2022). However, cultural creative and sporting activity also occurs in other sectors of the economy, and many industries directly employ people to perform these roles. Consequently, policy makers are increasingly using a broader definition of cultural, creative and sporting employment to assess the impact of culture and creativity on an economy or society (UNCTAD, 2022).

There are a number of methodologies and concepts that have been used to identify and measure occupations in cultural and creative sectors (excluding sports occupations) depending on countries and regions. In general, cultural and creative occupations are often underestimated in official statistics for a number of reasons. Often only activities and occupations in cultural and creative sectors are measured. However, cultural and creative workers can be employed in non-cultural and creative sectors (e.g., designers working in automotive industries). In addition, labour force surveys include a respondent’s main paid job but do not always capture secondary occupation, which is highly relevant to work in CCI&S. It is also important to note that the CCI& S includes high shares of volunteers or those who engage in cultural production outside of remunerated work. This accounts for a considerable share of unpaid work that is not captured by national accounting systems. They are sometimes included in cultural participation statistics but not in employment figures (OECD, 2022).

According to data obtained from STATISTA, across 50 countries worldwide, in 2014, the CCI&S accounted for 6.2% of the total employment, while Africa had the highest number of individuals employed in the CCI&S sector at 8.2% compared to the other regions (Figure 1) (STATISTA 2023). The average employment being 5.8% across developed countries and 6.9% in developing countries.

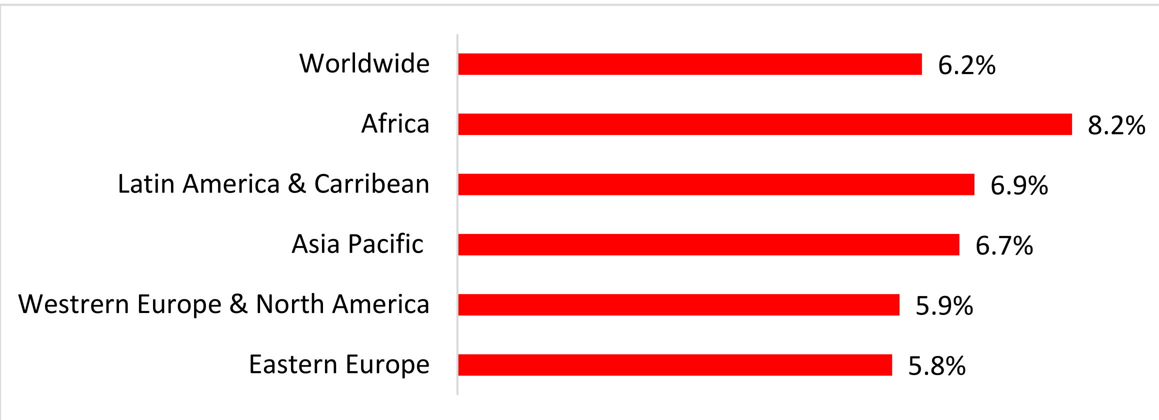

Figure 1: Share of employment in CCI&S by region and world-wide.

Data Source: Author’s own from data from Statista 2023[2]

[2] https://www.statista.com/statistics/1290367/global-share-of-culture-employment-by-region/

Also notably, a survey undertaken by Deloitte across nine economies in 2023 concluded that the creative economy employs nearly 20 million people. This represented more than 7% of total employment in those countries while in some such as Japan, this share was higher, up to nearly 13% of total employment (Figure 2).

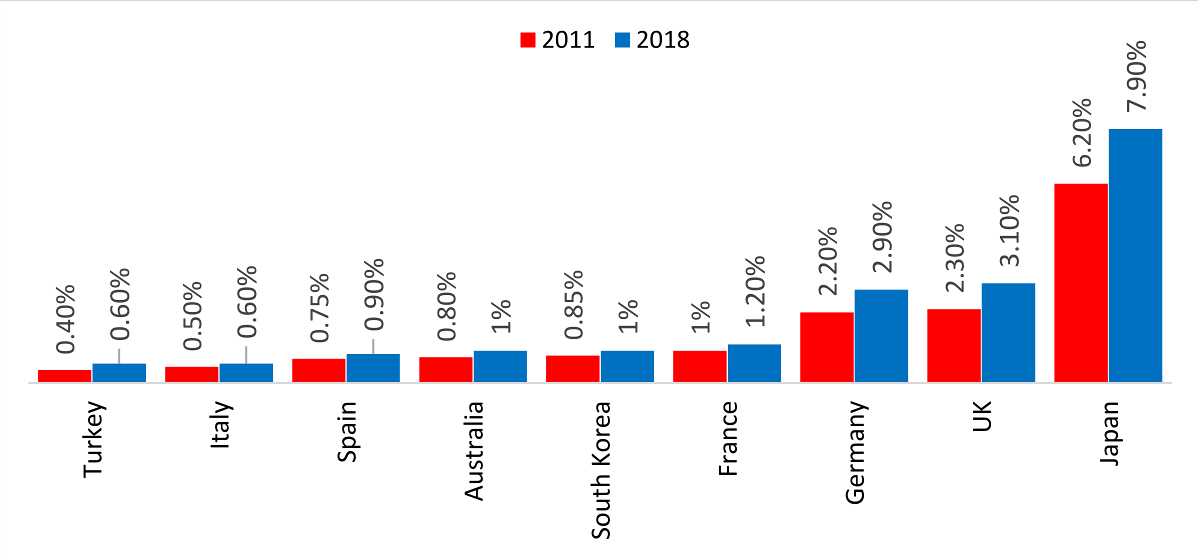

Figure 2: Number of employment and share of employment in CCI&S in nine selected economies.

Data Source: Author's own from data obtained from Deloitte 2023

Though the global rate of part-time work (22.1%) is lower in the CCI than across the overall labour force (26%) (UIS, 2016), people employed in developing countries are almost twice as likely to work part time (34.1%) compared to those in developed countries (17.4%). Conversely, in OECD countries, cultural occupations have a higher level of temporary work (15.4%) than across the labour market (11.4%) (OECD, 2021).

The labour market is subject to external shocks that determine certain labour demands. However, governments have a key role in shaping those markets and making them as equitable, sustainable, and competitive as possible, in line with SDG target 8.3 to support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises. This appears as a key concern for 68% of parties in recent years, as they reported adopting specific measures and programmes to support job creation in the cultural and creative sectors. Of these measures, 81% were reported by developed countries, compared to 63% by developing countries (UNESCO, 2022)

Disparities are further accentuated at the regional level, with 94% of Western European and North American countries adopting such measures, compared to 50% in Asia and Pacific and 55% of Arab States (Figure 3). There is closer parity between developing (75%) and developed (77%) countries when considering specific measures and programmes to encourage the formalization and growth of micro small and medium-sized cultural enterprises. Differences in policy approaches are also reflected in the type of measures and programmes implemented. While measures to create access to funding are the most common globally, developed countries (62%) were more likely to introduce them than developing countries (26%). They also introduced tax incentives (15%), strategies and development plans (15%). Developing countries, on their part, seem to prefer the creation of incubators and investment in business support programmes (28%) (UNESCO, 2022).

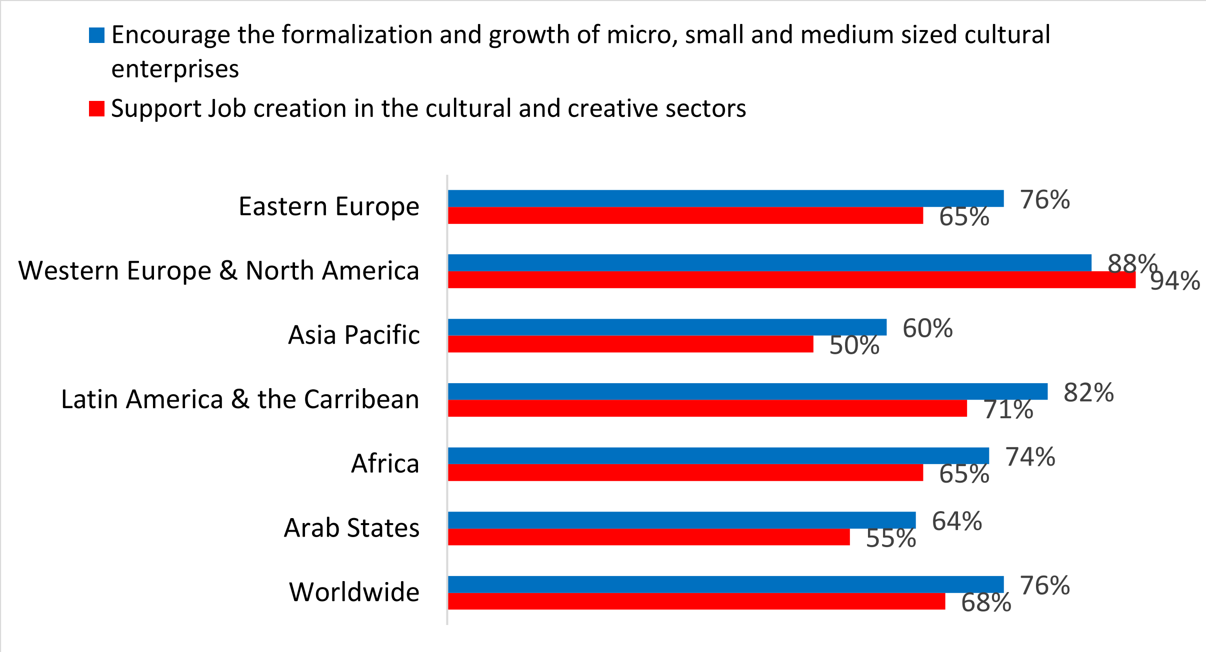

Figure 3: Specific measures and programmes implemented over the last four years to support job creation and/or micro-, small- and medium-sized enterprises in the cultural and creative sector

2.2. Measuring Cultural and Creative Employment

Employment in CCI (excluding sports) has been measured majorly using the "creative trident methodology" which focuses on employment, rather than production or trade data (Higgs, Cunningham, and Bakhshi, 2008). The trident approach has been used in measuring cultural and creative employment that is inclusive of all those working in CCI&S and those working in cultural and creative occupations in other sectors of the economy (Table 1). It distinguishes between cultural and creative industries and cultural and creative occupations. Some labor force working in CCI&S will be employed in cultural and creative occupations (e.g. a dancer) and some will be employed in non-cultural and creative occupations (e.g. an accountant for a dance company) (OECD, 2022). Equally, some people working in cultural and creative occupations will be employed in other sectors of the economy. Consequently, the trident model considers three groups of workers as being employed in cultural and creative employment (Table 1). The model offers policymakers several advantages over other approaches: it focuses on core creative added value; helps distinguish creative individuals working in other sectors and creative individuals and others who work in creative industries; it uses census data rather than sample surveys; and lastly it enables to determine the total personal earnings arising from creative employment.

Table 1: The Creative Trident

	Main sector of employment is a cultural and creative sector	Main sector of employment is not a cultural and creative sector
Main job is a cultural and creative occupation	X	X
Main job is not a cultural and creative occupation	X	

Source: Adapted from Eurostat (2018), Guide to Eurostat Culture Statistics, Publications Office of the European Union, Luxembourg. Note: Only workers in cells with a checkmark are counted in cultural and creative employment statistics.

In 2013, Nesta, with the United Kingdom's Department for Culture, Media, and Sport, published a report titled *A Dynamic Mapping of the UK's Creative Industries* (Bakhshi et al., 2013) which presented a new way of classifying the United Kingdom's creative industries focusing *mainly* on creative intensities. This model measured the employment within the creative sectors as a proportion of total employment in the industry. The dynamic mapping approach, which is a three-stage process states that an industry with a high percentage of cultural or creative workers, can be considered a creative industry.

Overall, Countries interested in measuring their creative economy can adopt a general approach that includes setting objectives, bringing together relevant stakeholders, conceptualising and defining the scope of creative industries, identifying parameters to measure (i.e., contribution to GDP and employment in the industries considered creative, exports of creative goods and services) and available data sources, data collection, analysis of the collected qualitative and quantitative information, and their evaluation (UNCTAD, 2022).

2.3. Estimation of Africa employment in CCI

The creative economy is a source of innovation that spills into other industries and increases their productivity and competitiveness (UNCTAD, 2019). Evidence shows the CCI (excluding sports) creates at least three types of economies-wide spill overs; knowledge spill overs in the form of new ideas, skills, and innovations; industry spill overs seen as gains in productivity through the creation of vertical value chains; and network spill overs through an agglomeration effect (Metro Dynamics, 2020). This dynamic sector has presented an unprecedented opportunity for developing countries to leapfrog into a high-growth and sustainable economic path (UNCTAD, 2021). This is especially true for Africa as it undergoes creative revolution.

Africa ranks as the fifth largest cultural and creative industries market. The CCI in Africa Countries which include Mali, Morocco, Mozambique, Nigeria, Senegal, Democratic Republic of Congo, and *South Africa* have significant production and consumption of cultural products, including music, dance, crafts, and visual arts (M'Hammdi and Jaïdi, 2022). More specifically, the film and audio-visual industry accounts for US$5 billion in GDP in Africa, employing an estimated 5 million people. With further investment, FEPACI estimates the sector has the potential to create over 20 million jobs and generate US$20 billion in annual revenues.[3] For example, the Nigerian film industry, Nollywood, is the second largest employer in Nigeria with 300,000 direct employees, generating approximately $800 million annually which accounts for 2.3% of Nigeria's GDP (Matengo 2022). Although, African musicians still lack sufficient recognition of industry and representation in the global market, the African Music industry is the biggest export from Africa after oil and gas with Nigeria's music industry generating $150 million per year and (Afreximbank, 2022).

The remarkable cultural diversity of Africa promises much for the effective usage of the untapped creative potential that is inherent in a continent that accounts for around 15% of the world's population (M'Hammdi and Jaïdi, 2022). Given that 60% of the African population is aged under 25, and 200 million people in Africa are aged between 15 and 24 (with these figures projected to double by 2045), Africa needs to create one million jobs every month to integrate the flow of new arrivals into the labour market. Further, a quality education is critical to contribute to the prospects of

[3] https://aptantech.com/2016/09/africas-film-industry-can-grow-to-20-billion-create-20-million-jobs

innovative and entrepreneurial strategies that will significantly boost the creative and cultural industries of the continent, and lead to exports of African goods, arts, and ideas to the rest of the world.

Data on CCI contribution to employment can provide additional information but is also scarce. Attempts to measure the size of employment in the cultural and creative sector face a statistical challenge due to the informal and unregulated nature of many CCI&S activities (Newbigin, 2014).

Notwithstanding, data available across different African Countries indicate that South Africa has the highest CCI&S contribution to employment compared to any other country in the continent. In 2020, 1.14 million people were directly employed by CCI&S in South Africa, six percent of South Africa's total workforce. Thousands more were indirectly employed by CCI&S (SACO, 2022). In Malawi, CCI&S contribute 3.35 percent to employment and in Botswana, creative industries contributed 2.66 percent to employment in 2019, more than mining, quarrying, finance, and insurance, water, and electricity (Fondo, 2021). International Labour Organization data shows that Nigeria's crafts and related sector employed the highest number of individuals in 2019 (about 8.1 million), followed by Egypt (4.9 million), and Ghana (2.5 million). Female participation in this sector is also highest in Ghana, at 49.2 percent, followed by Nigeria, at 40.3 percent. In Egypt, in contrast, just 2 percent of females participate in the crafts and related sectors (International Labour Organization, 2019). Moreover, Africa's CCI&S industries in Africa employ more young people aged 15-29 than any other sector (20% of total employment in those sectors).

Yet despite demand for CCI jobs, working conditions remain poor for the majority of the workers, and the presence of the informal economy in this sector is large. Still, creative industries could be important in providing decent jobs for young people in Africa, and the potential for development opportunities for youth employment is significant. Africa's creative industries may be up for the challenge, as the quickly growing sector will be a key employer, boosting the continent's gross domestic product, and spurring a digital transformation. The growing market demand for creative content, combined with the productive power of digital technologies, will create a potential demand in this sector for various professions, including writers, performers, directors, designers, and audio-visual technicians (M'Hammdi and Jaïdi, 2022).

Africa's creative and cultural industry has emerged as a growth industry and is expected to play a critical role in the process of the continent's renaissance. For example, the total number of video gaming industry users in Africa grew from 77 to 186 million between 2015 and 2021 due to rapid digitalization amidst the pandemic, led by smartphone owners (95 percent of all gamers), offer significant potential for Africa's youth (Tech Space Africa, 2021). Experts say the CCI&S has the power to boost intra-African trade, and in return promote the emergence of national and regional value chains. But this might not be realized unless strategic policies on investment, funding, and implementation are put in place to harness the enormous potential in the continent (UNESCO, 2022).

3. EMPLOYMENT IN SOUTH AFRICA'S CULTURAL AND SPORTS INDUSTRY

This section features the cultural and creative occupations, and includes sports,-and therefore the abbreviation CCI&S.

3.1. National employment in the Cultural and Sports Industry

As already noted, the CCI&S plays a significant role in employment opportunities and hence contributing to overall employment in South Africa. Based on the cultural Trident, employment in south Africa's CCI&S comprise of those employed in the creative economy (those employed in the creative occupations, inside and outside the creative sector, as well as those in non-cultural jobs in creative sector firms); the Creative Industries (CCI&S employees comprising of both cultural and non-cultural workers) and Creative Occupation (employees in cultural work both in, and outside of, cultural firms).

In 2021, the total CCI&S employment (including both cultural and non-cultural support jobs in the CCI&S) in South Africa was 7.2% per cent of total jobs,- accounting for 1.05 million jobs (Stats SA 2023). This percentage is lower than the global employment of individuals in the creative economy of 8.2 per cent.

3.2. Quarterly Cultural and Sports Occupations

Figure 4 gives a national quarter on quarter employment performance of the CCI&S between 2021 and 2023. Nationally, as seen below, employment in the CCI&S declined marginally between quarter 1 and quarter 3 of 2021, consistent with the trends in the national employment rate which recorded a decline of 6.2% in 2021 as compared to the previous year. The 2021 trend was a continuation of the decline initiated by the Covid-19 pandemic in 2020. The sudden increase in employment during quarter 4, followed by a sharp decline in quarter 1 of 2022, relates to the high volatility of cultural and creative industries compared to non-cultural occupations. Employment data in the CCI&S further shows a steady increase since 2022 with just under 1.23 million individuals employed in CCI&S by the end of quarter 4 of 2023. This translates to 7.4% of total employment in the country in quarter 4 of 2023, compared to 7% share in quarter 1 of 2021.

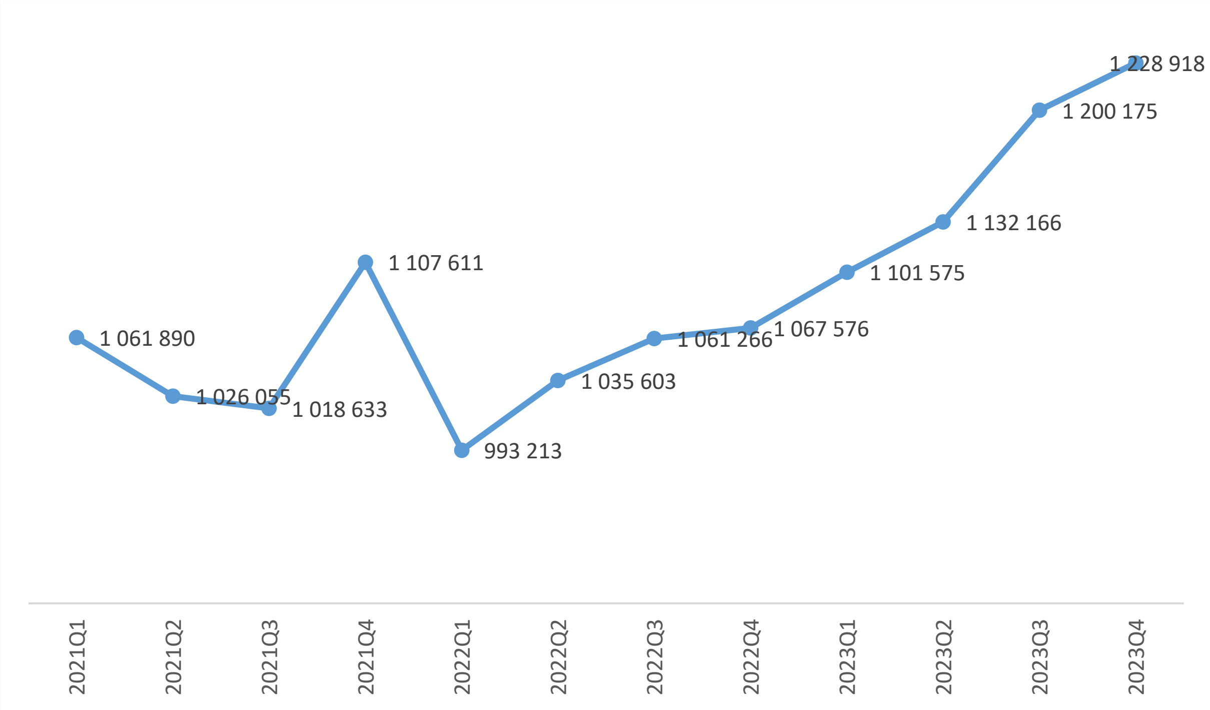

Figure 4: Quarterly Employment Trends between 2021 Q1 and 2023 Q4.

3.3. Employment in Cultural and Sports Occupations by Domains and Province

Evidently, the most digital domains, namely, audio visual & interactive media and design & creative domains have been the main employers in the industry between 2021 and 2023. Conversely, two of the worst performers in employment terms are less digital domains,-visual arts & crafts and performance and celebration. Sports and recreation employment has been on a rise, from 55 677 in 2021Q1 to 99 063 in 2023Q4. As illustrated below, the various domains illustrate fluctuations, which reflects the vulnerability of the industry to both internal and external shocks. There are no fundamental differences in fluctuations.

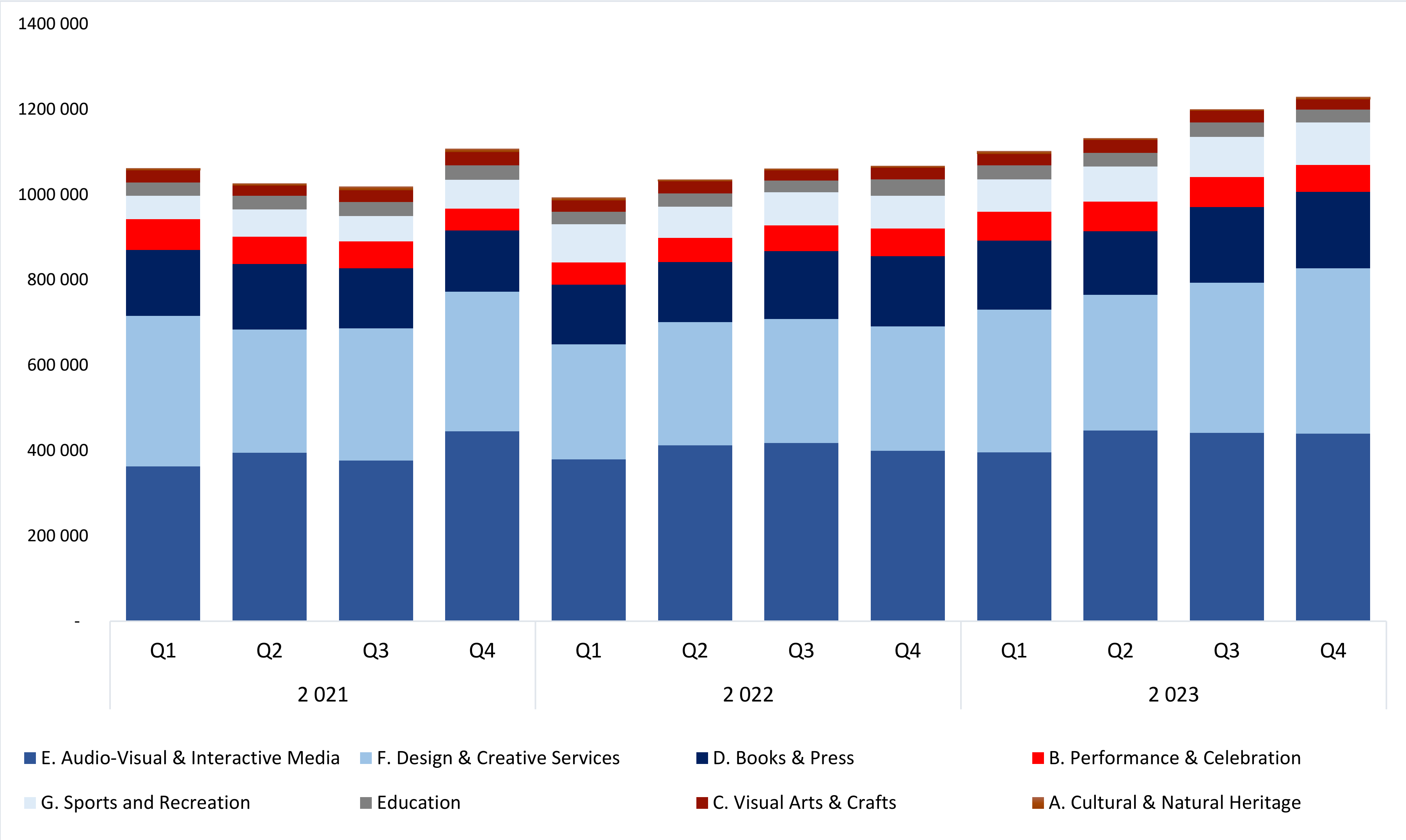

Figure 5: Quarterly Employment Trends between 2021 Q1 and 2023 Q4 by domain.

On geographic distribution, Gauteng Province is clearly dominant in terms of creative economy employment activity. This is considering that it provides employment to 39% of South Africa's workers in cultural and sports occupations (on average 400,000 workers). Western Cape follows at a distant second, fluctuating between 200,000 and 250,000 employment opportunities between 2021Q1 and 2023 Q4. In Kwa-Zulu Natal, the CCI&S employs an average of ranging between 170,000 and 190 000 people, between 2021Q1 and 2023 Q4.

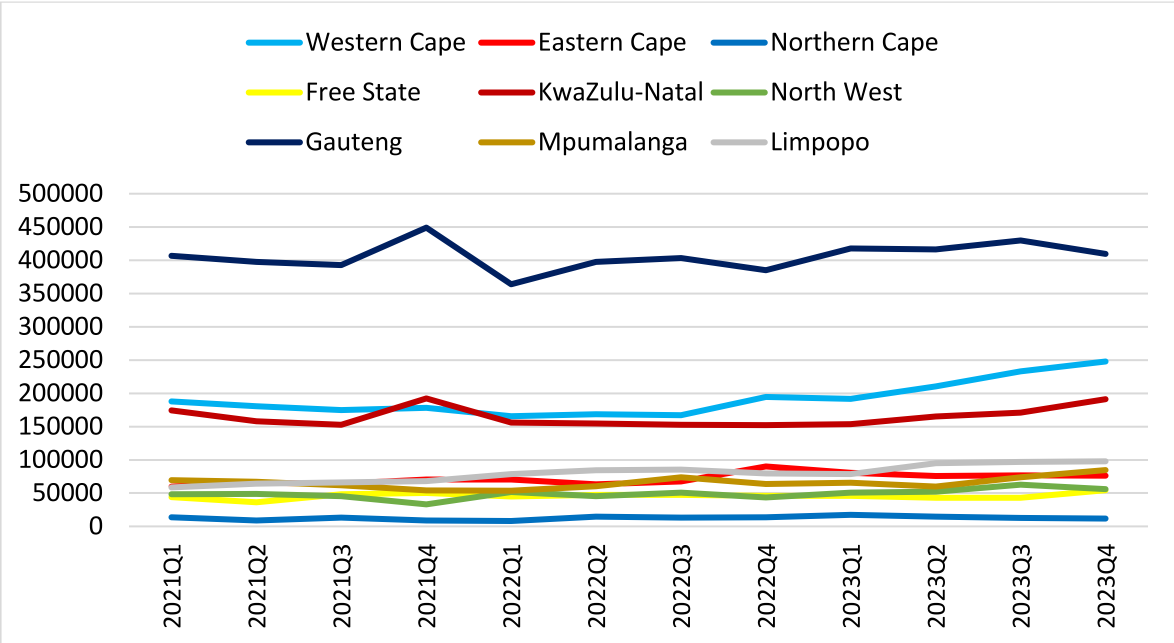

Figure 6: Quarterly Employment Trends between 2021 Q1 and 2023 Q4 by province

A closer look at the quarterly trends of the CCI&S domains shows that across all provinces, the audio visual and interactive media dominates all the other domains, followed by design and creative services. There are cases, however, where both domains compete for employment dominance, in which case overlapping trends are observable. This is particularly the case for KwaZulu Natal and Western Cape. Some provinces such as Northern Cape, Western Cape and Free State experienced quarterly decline in CCI&S employment during the first quarter of 2021. Northern Cape is particularly the least steady of all the provinces, on employment.

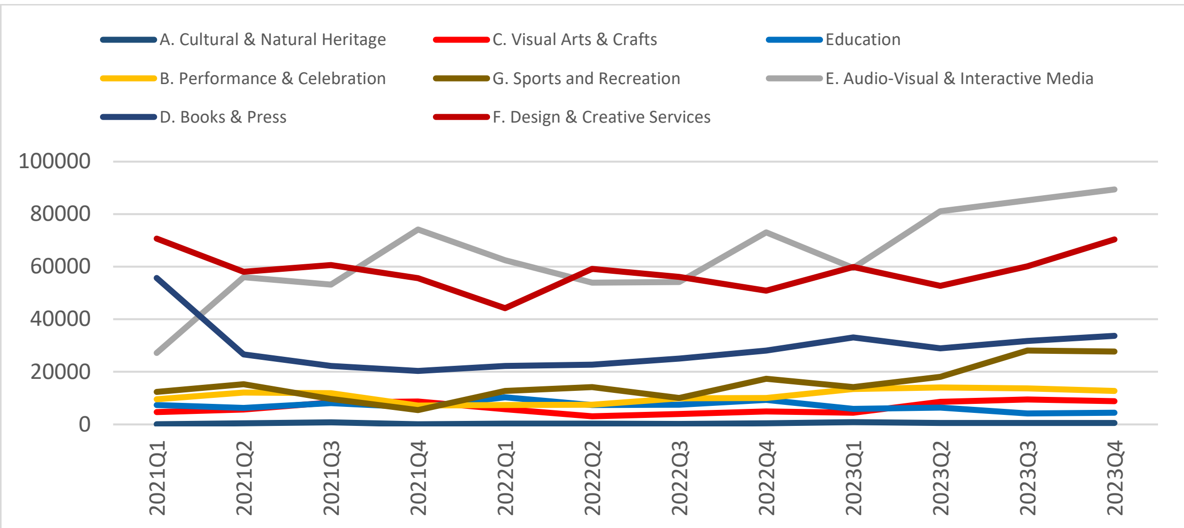

Figure 7: Quarterly Employment Trends by Domain: Western Cape

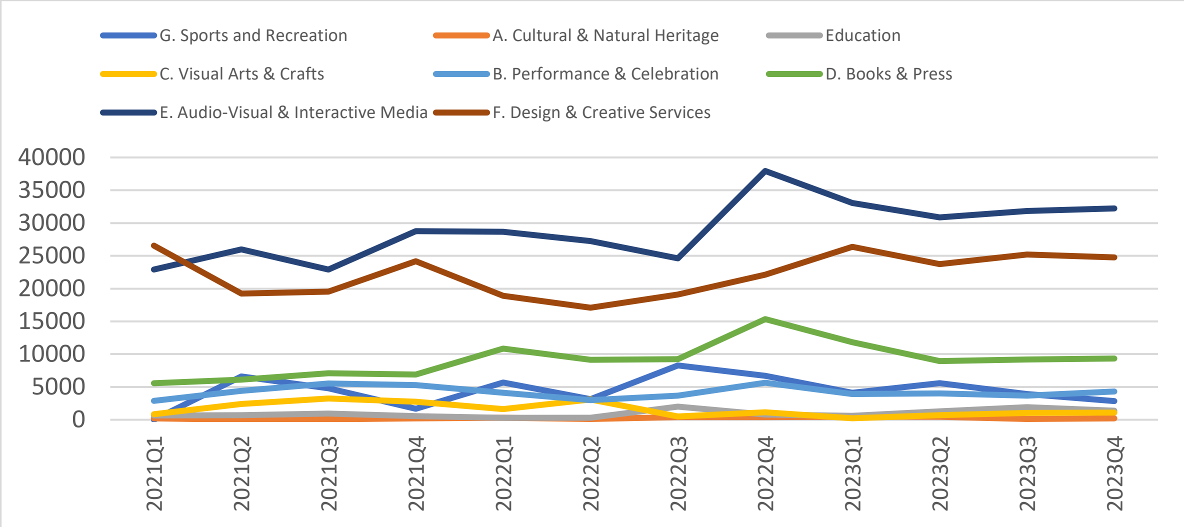

Figure 8: Quarterly Employment Trends by Domain: Eastern Cape

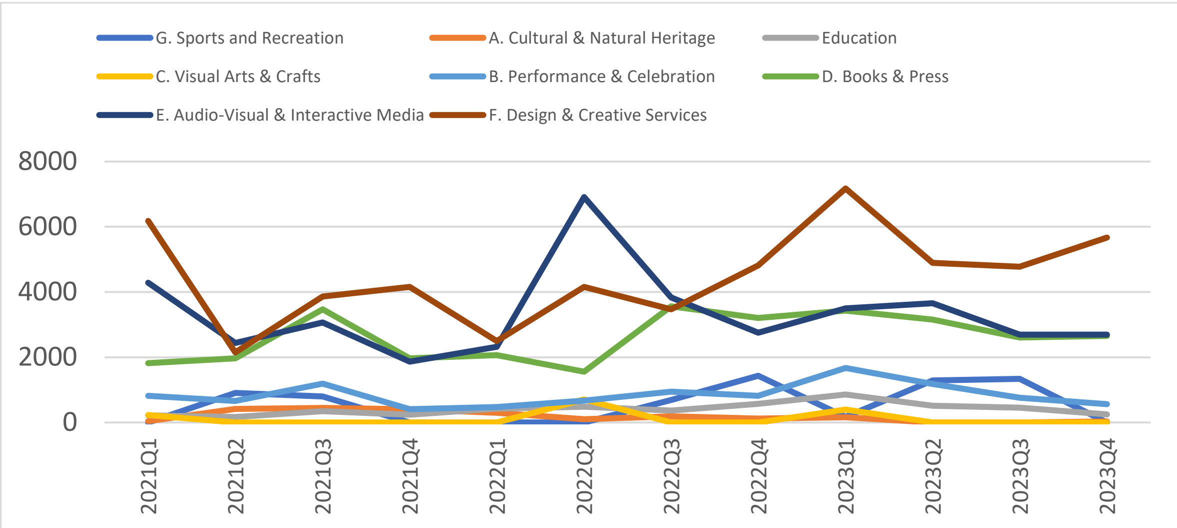

Figure 9: Quarterly Employment Trends by Domain: Northern Cape

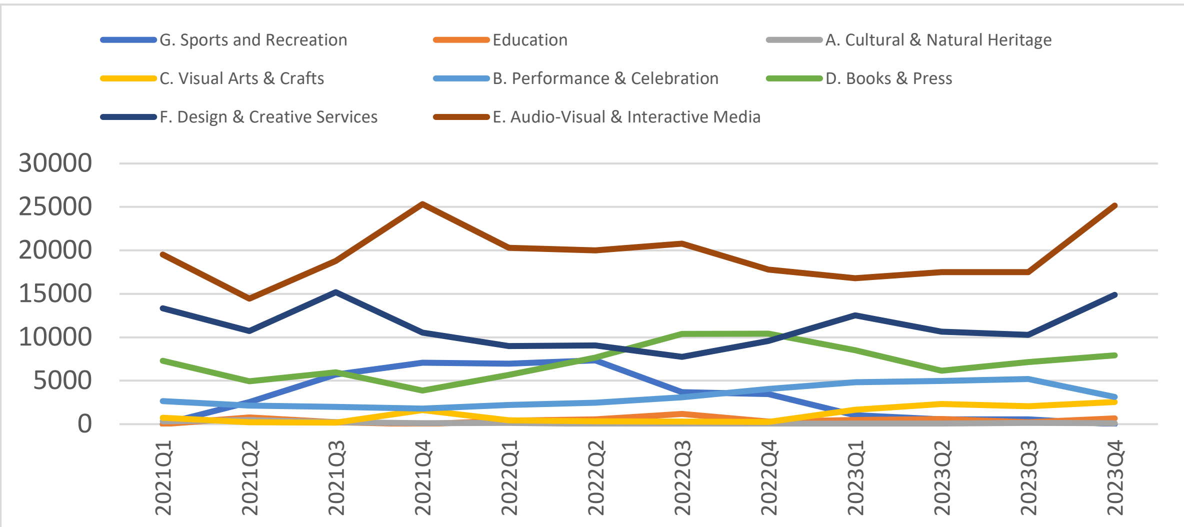

Figure 10: Quarterly Employment Trends by Domain: Free State

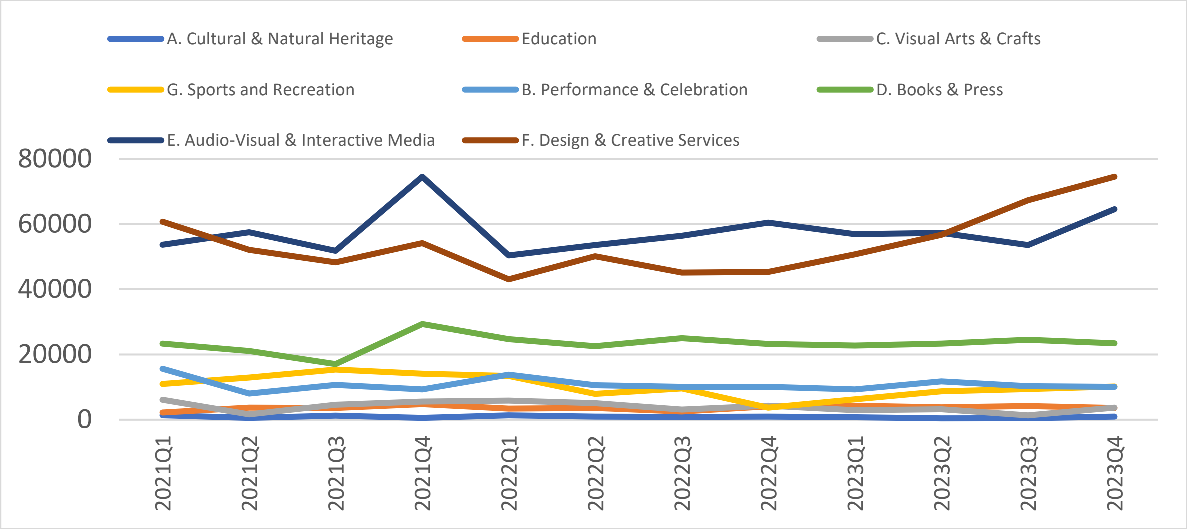

Figure 11: Quarterly Employment Trends by Domain: KwaZulu Natal

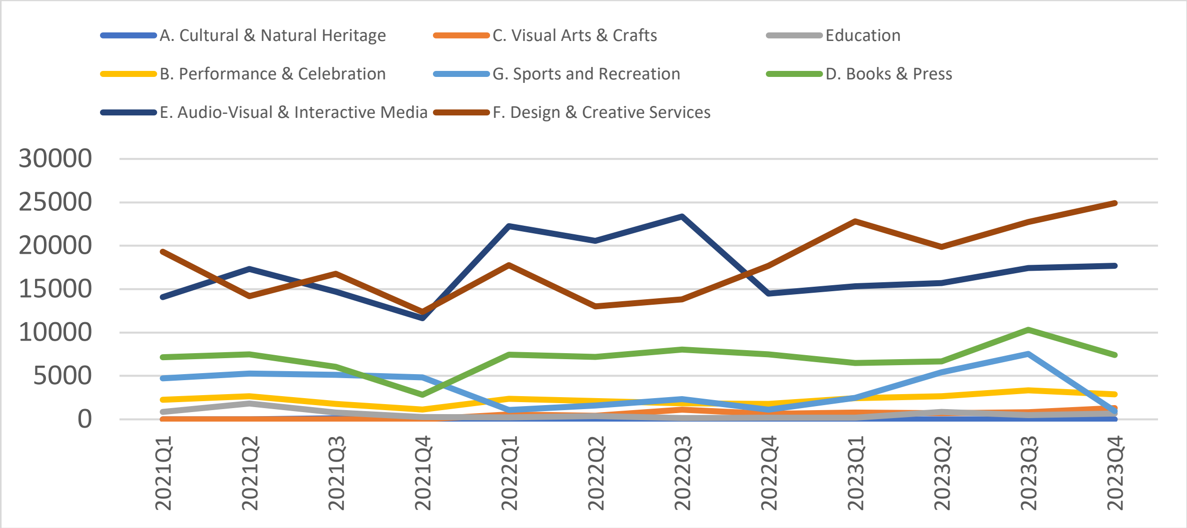

Figure 12: Quarterly Employment Trends by Domain: North West

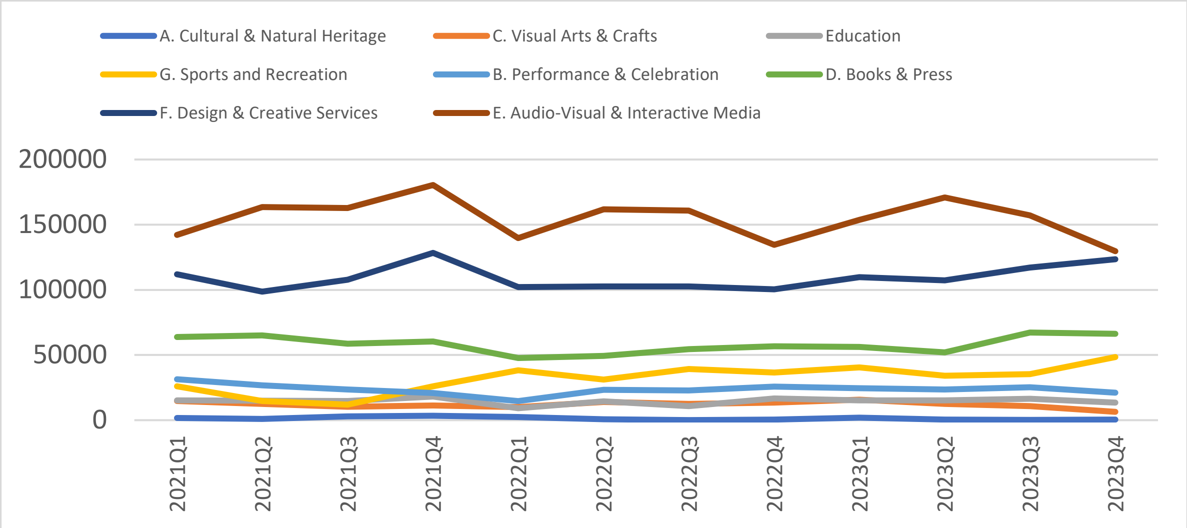

Figure 13: Quarterly Employment Trends by Domain: Gauteng

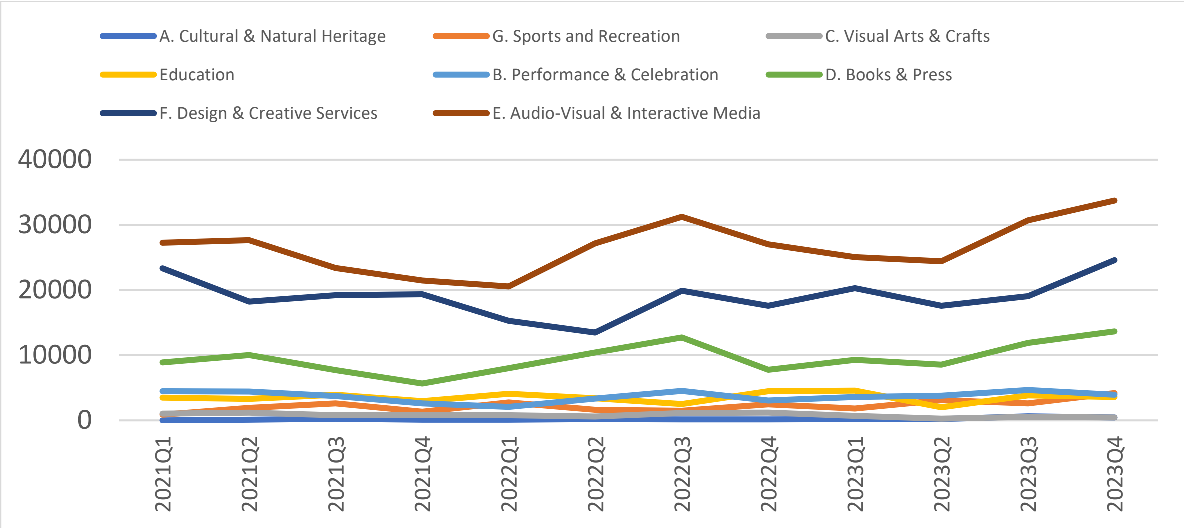

Figure 14: Quarterly Employment Trends by Domain: Mpumalanga

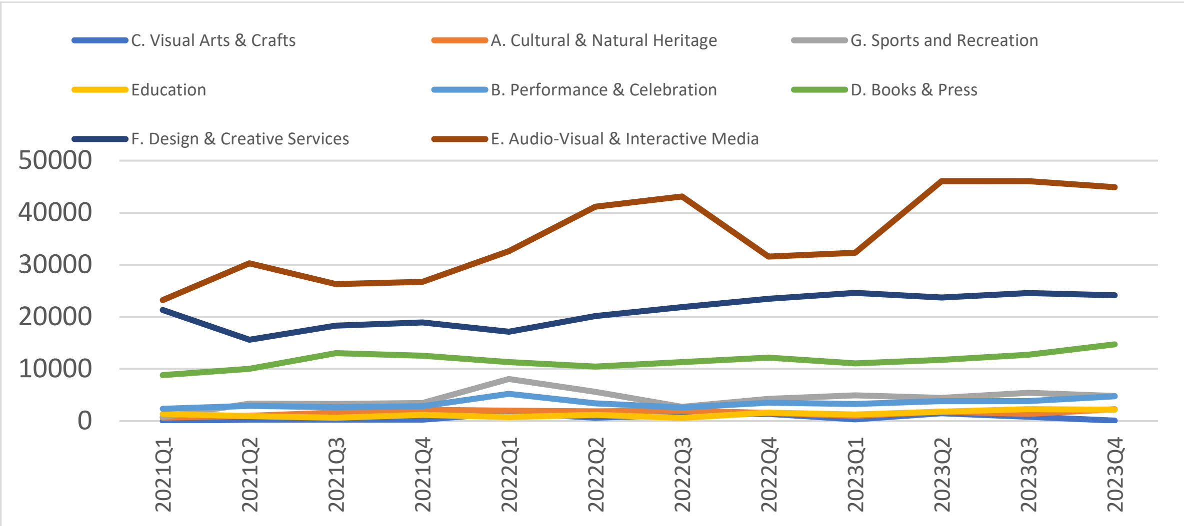

Figure 15: Quarterly Employment Trends by Domain: Limpopo

3.4. Employment in Cultural and Sports Occupations by Education level

NB: Analysis in this section includes the sporting industry, hence the abbreviation CCI&S

Quarterly Education analysis reveal that most of those employed in the CCI&S have either not completed secondary, or they have completed secondary education. This trend is consistent through the quarters stretching from 2021 Q1 to 2023Q4. In quarter 1 of 2021, the employed labor force in the industry who have some secondary education or have completed, amounted to about 800,000, with slight decline recorded during 2021 Q2 and Q3.

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

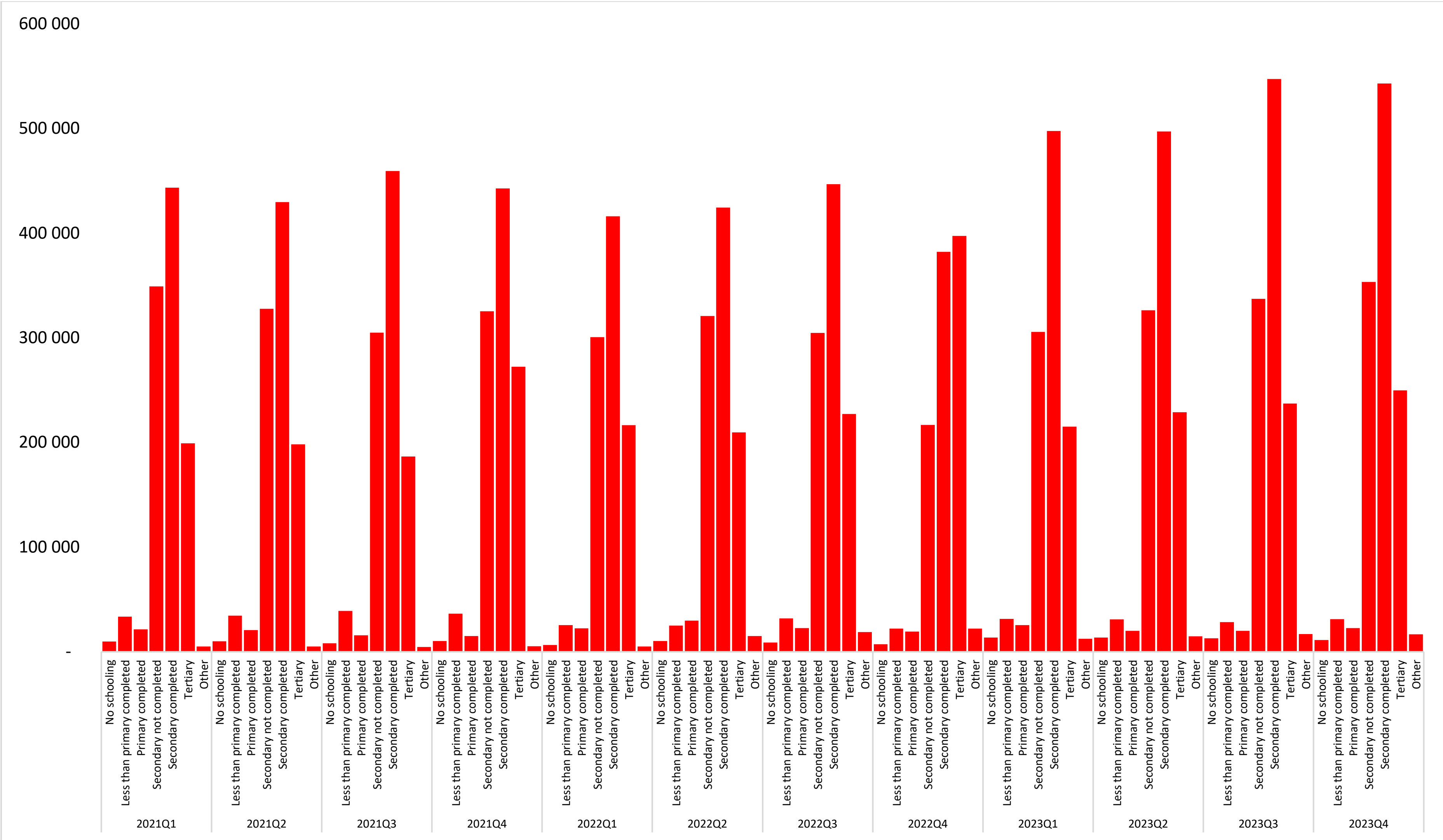

Figure 16: Quarterly Employment Trends between 2021 Q1 and 2023 Q4 by Education Level.

Further analysis suggests that audio visual & interactive media and design and creative services employ the largest share of those who have no formal schooling. Employment of those who have no formal schooling increased in the Audio visual & interactive media domain in 2021Q2, while the numbers declined in the design and creative services domain in 2021Q2. This pattern should be considered in the context of Covid-19, where those who have no formal schooling were forced to find some form of livelihood, thus turning to digital based (mainly social media) opportunities.

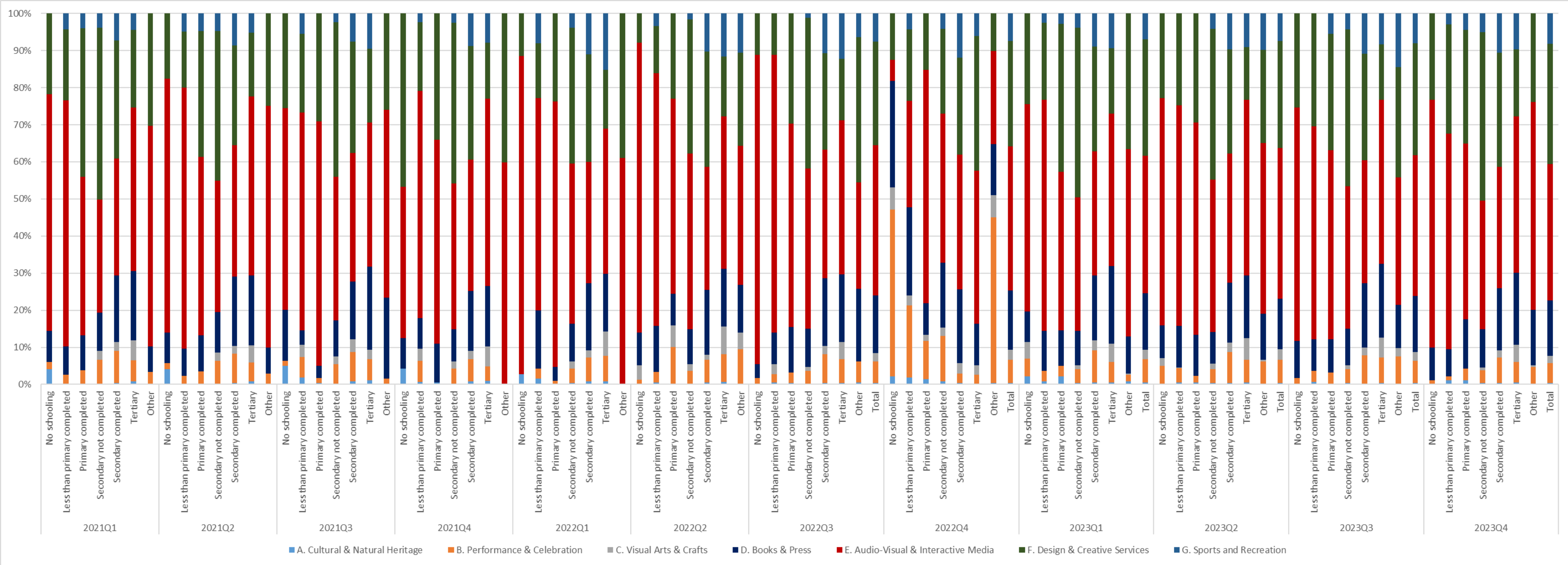

Figure 17: Quarterly employment by education

3.5. Employment in Cultural and Sports Occupations by Race

Although not yet representative of the population demographics, there is evidence of more racial diversity among those working in cultural and sports occupations in South Africa. Thus, according to Statistics South Africa, in 2023, 74.6 % of those in cultural occupations are African/black, 9.1 % are coloured while 4.5 % are Indian/Asian. Whites make up 11.8 per cent of workers in cultural occupations, although they represent less than 10% of the population (Figure 18).

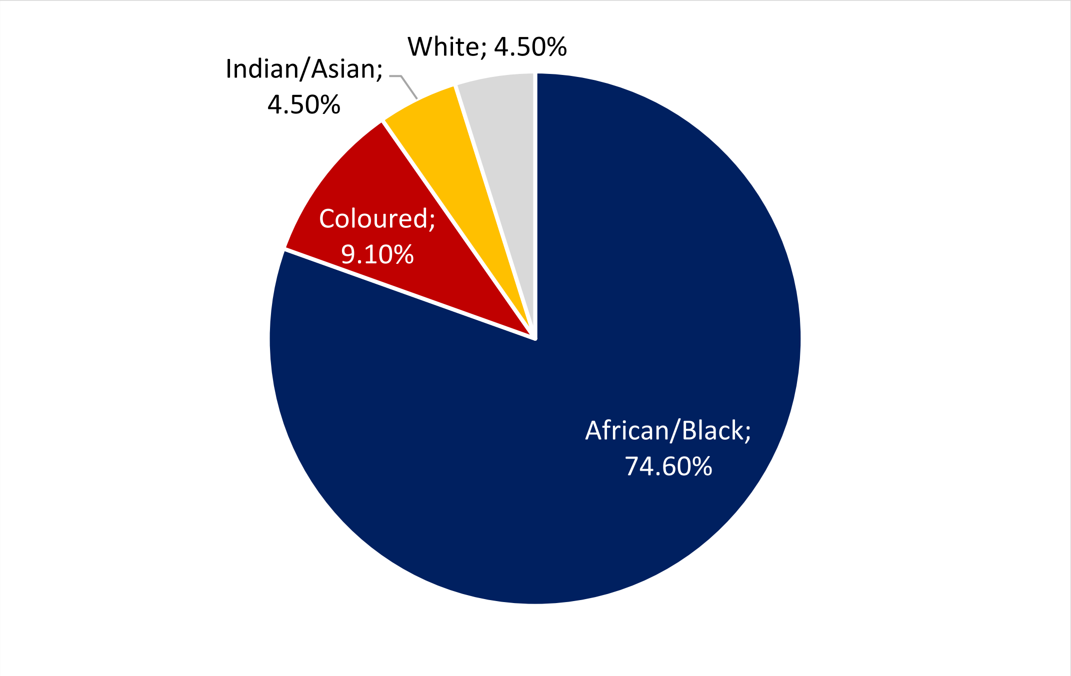

Figure 18: Employment in South African Cultural and Sports industries by race,

Data source: StatsSA (2023)

The quarterly trends are consistent with the annual patterns. Labor participation of Africans remain a signifcant majority through all quarters since 2021, although since 2023Q1, the steady upward trend of employment in this population group seems to diverge from the rest of the population groups. The employment growth among other population groups seems stable during the 2023 quarters. This is likely attributable to the informal nature of the sector, of which most black Africans undertake livelihood activities in the CCI&S

This might also point to the gradual recovery of the creative industry post-covid-19.

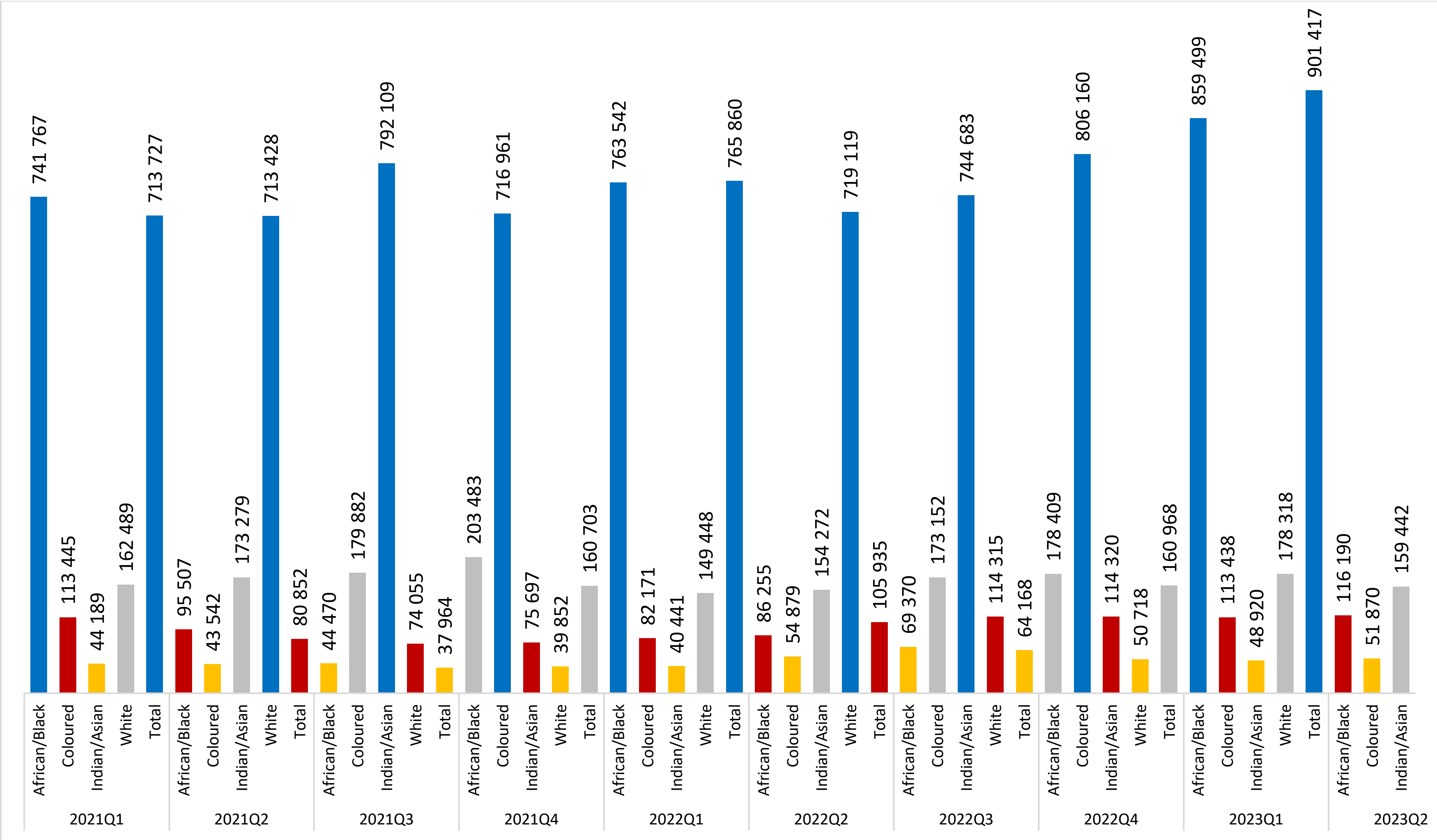

Figure 19: Employment in South African Cultural and Sports industries by race (2021-2023).

3.6. Employment in Cultural and Sports Occupations by Gender

There are no major surprises on employment in the creative and sports industry, with regard to gender. Since 2021 Q1, the creative economy has employed more men than women. It should be noted that women employees reflect an average of 45% through the quarters between 2021 and 2023. A closer look at the domains, however, shows that the audio visual and interactive media is the only domain that employs more women than men, through all the quarters between 2021Q1 and 2022Q4. This data points to shifting gender dynamics in the audio-visual domain, considering that studies that women were under-represented in the audio-visual and interactive media domain. Higher numbers however, should not be understood to mean more economic benefits than men. In this light, Bob and Munien (2022) observe that positions which are mainly occupied by women,- i.e.; producer, assistant director, costume designer and make-up,-are generally low paying. These jobs also do not provide opportunities for decision making. The data points to the need for deliberate interventions which aim to promote women labor participation in the creative economy. Such participation should consider more than achieving quantitative numbers, to equity,-which ultimately would account for economic output and impact.

Also as noted in previous reports and mapping studies, the significant under- representation of young women in cultural occupations compared to young men is a concerning trend . In 2019, only 26 .5% of women in cultural occupations were youth, compared to 37 .7% of men.

The figure below shows trends in employment by gender. It is evident that the industry employs more males than females. Quarter 1 of 2023 recorded the most jobs for males at 58%, while quarter 2 of 2021 recorded the highest number of females employees at 46%.

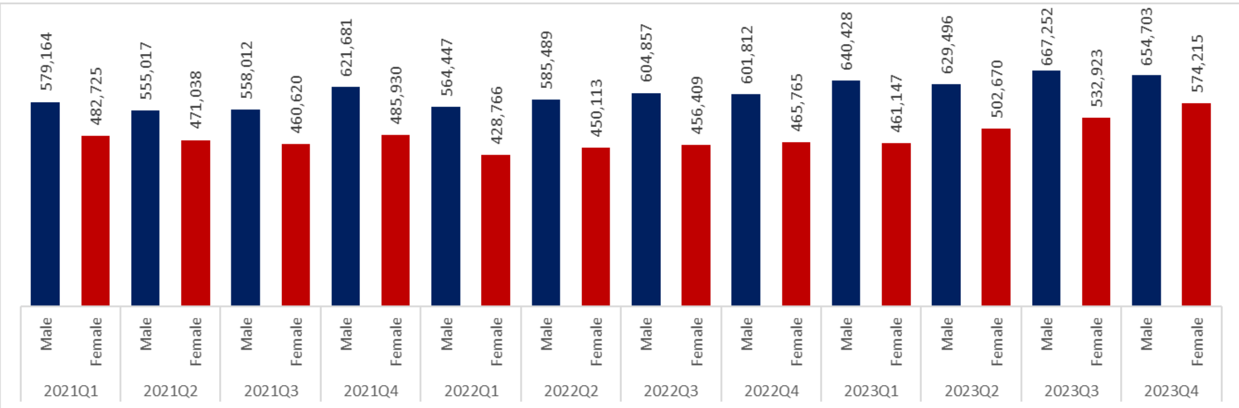

Figure 20:Employment in South African CCI by gender (2021-2023).

3.1. Employment in Cultural and Sports Occupations by Gender

Notably, generally, age groups are evenly spread from 25 years to 49 years. This is also the traditionally active work force. Also, literature review suggests that the creative economy employs younger population (particularly those aged between 15-29) than any other sector in the world (Salman, 2010).

Generally, youth (15-34) make up on average 39% of total employment. Quarter 2 of 2022 recorded the highest number of youth employment at 41%. The second biggest employed age group is 35-39, averaging 17% of the jobs in the industry.

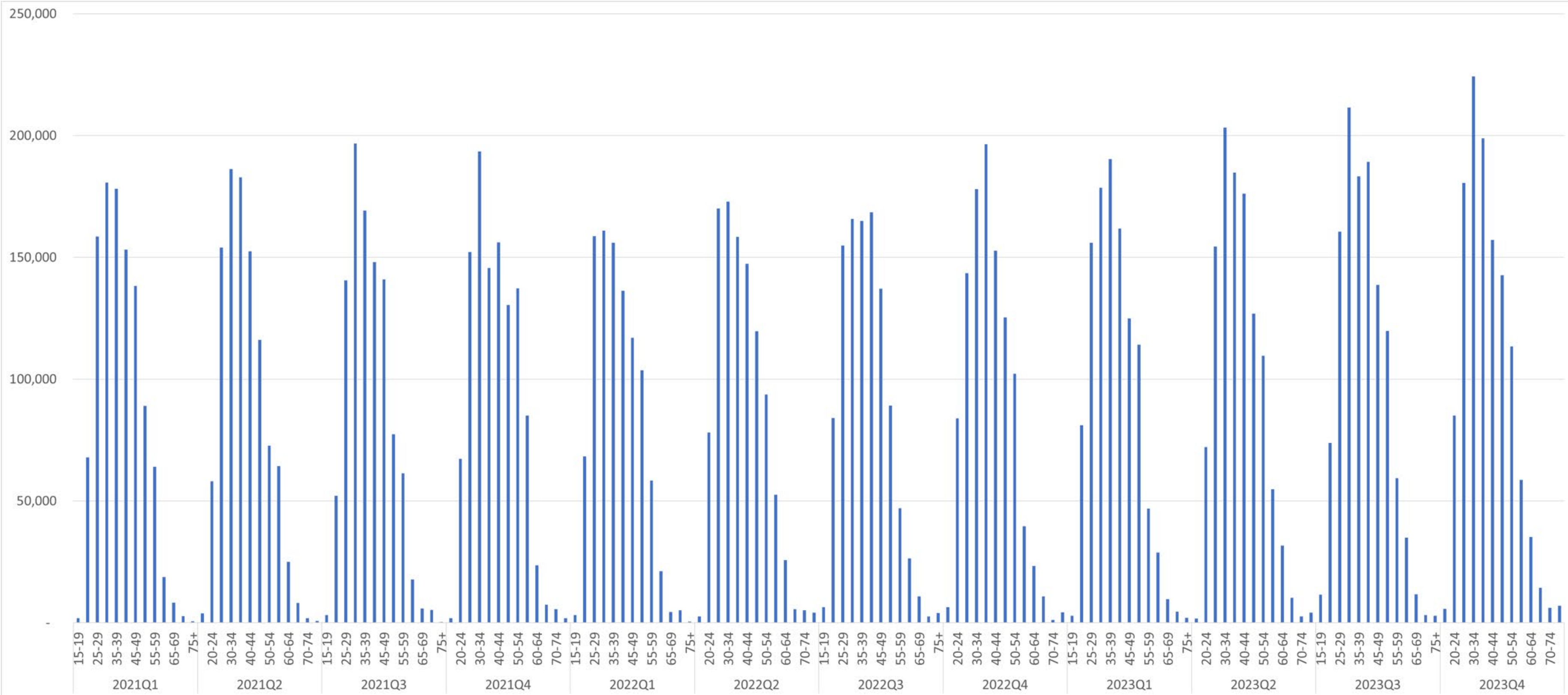

Figure 21: Quarterly employment by age

3.2. The Impact of Covid-19 on Cultural and Sports Industry

3.2.1. COVID-19 impact on employment in the Cultural and Sports Industry

The COVID-19 pandemic had a devastating impact on certain CCI&S and deepened their pre-existing vulnerabilities. It is approximated that in 2020 about 10 million jobs were lost during this period valued at US$ 750 billion globally (UNESCO, 2022). In the same year, the income drawn by creators fell by more than 10 per cent or more than €1 billion. Globally, COVID-19 contributed towards the cancellation of venue based cultural events, exhibitions, concerts, performances, and festivals, along with the restrictions on social distancing and limited economic activity in many countries. This negatively affected cultural workers, freelancers, the self-employed and other stakeholders in the creative sector and contributed to the decline in number of employed personnel within the CCI&S sector (Joffe, 2020, Ratten, 2020a, Ratten, 2020b, Ratten, 2020c). A comparative study about the impact of COVID-19 on the creative sector in Africa showed that the most vulnerable sectors were performing arts, visual arts, and the heritage sector (Khlystova, Kalyuzhnova, and Belitski, 2022). These sectors have high levels of informality, a high proportion of freelancers, and extensive use of short-term contracts. In addition, companies tend to be micro and small size, and face-to-face interactions, like attending performing arts events, are essential to their business models. UNCTAD estimates that, in 2020, exports of creative goods shrank by 12.5 per cent year on year globally, almost twice as much as exports of all commodities, while exports of creative services fell by 1.8 per cent year on year (UNCTAD, 2022).

Overall, the COVID-19 pandemic accelerated the transition to digital platforms in the gaming and animation sector (ILO, 2023). There has been a steady trend of internet users playing video games (86 per cent), which has been unchanged since 2015 (GWI, 2021). Lockdowns increased the demand for and consumption of video games and e-sports, increasing the revenues for gaming enterprises and platforms (WEF, 2020). Gaming on demand and cloud gaming, as well as "games as a service" through subscription services, are on the increase; while the production and demand for console and PC games were particularly disrupted by the pandemic (console games declined 8.9 per cent between 2020 and 2021 and PC games 2.8 per cent (Newzoo, 2021)). This shift in the demand towards mobile games and related revenues is led by Asia and the Pacific (ibid).

COVID-19 pandemic disrupted every aspect of the sporting value chain resulting job losses and financial losses. This was mainly attributed to the global cancellation of sporting events which negatively affected athletes, teams, leagues, and media that broadcast games. The three main sources of income for professional sports leagues – broadcasting (sales of media rights), commercial (sponsorship and advertising partnerships) and match day revenue (ticketing and hospitality) – all decreased significantly (Keshkar, Dickson & Ahonen, 2021).

3.2.2. Impact of the COVID-19 pandemic on Post Covid-19 Employment Recovery in the CCI&S

In assessing the past COVID-19 recovery in the occupations, QLFS data was used. Data from each quarter of 2022 was compared on a year-to-year basis to data from the same quarter in 2021 and data for each quarter of 2022 was compared to previous quarters of that year. The analysis was done for people working in the creative industries, sports and for people working in other industries other than creative and sports.

The data shows that, for every quarter of 2022, there were more people in creative industries and non-creative industries than in 2021. 2022Q1 saw the largest fall in the occupations in the sports and recreation industries (15.2 percent) implying that the sporting industry took quite a longer duration to recover from the impact of COVID 19 (Figure 22). Compared to non-creative and sporting jobs, the jobs in the creative and sporting industries have experienced growth after the COVID-19 pandemic. For example, there were 13.4 per cent more CCI&S occupations in 2022Q1 than in the same quarter of 2021 and only 8.9 per cent more non-cultural and non-sporting occupations over this same period (Figure 22) . Continuous higher percentage in CCI&S and sporting jobs can be observed in the respective quarters of 2022 compared to 2021. This I can be attributed to the lifting up of COVID-19 restrictions that improved informal and freelance work, improved face to face interaction which is characteristic of the CCI& S occupations.

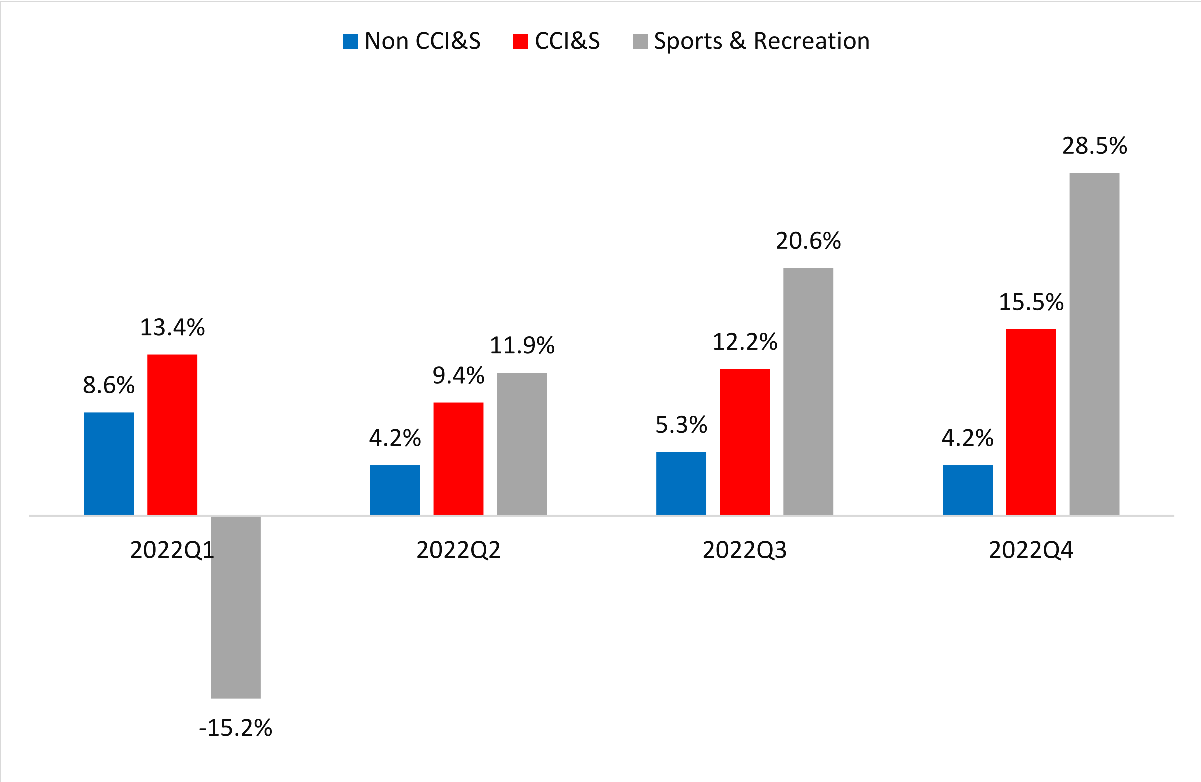

Figure 22: Year-on-year percentage change (2021-2022) in Creative industries and Sports and recreation Occupations:

Source: Quarterly Labour Force Surveys, 2019 and 2020; Authors' own analysis

International literature has generally found that the COVID-19 recession was worse for women than for men. There is evidence both globally (Bluedorn et al., 2021) and in South Africa (Casale and Shepherd, 2021) that women bore the brunt of job losses, particularly in the early periods of the pandemic. According to SACO 2020 report in South African, the COVID-19 pandemic impacted negatively both men and women in the CCI&S industries, however a great number of job losses was observed in men. Thee fore in assessing the post COVID-19 recovery, it can be observed that greater job recovery across the different domains of the Creative industries was among men from 2021 to 2023 (Figure 21). In comparing the different domains within the creative industries, we note that male are mainly employed in all the domains. In comparing the three years from 2021 to 2023, in 2021 75.4 percent of the male were employed in the visual arts & crafts compared to 25.6 percent female (Figure 23)

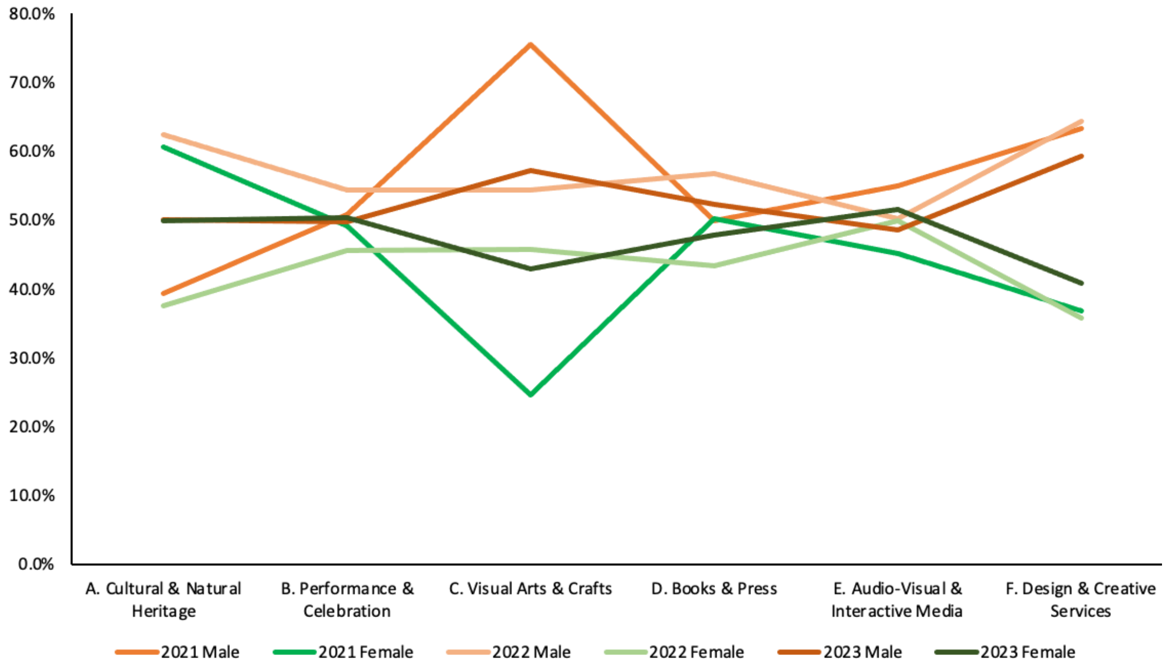

Figure 23: Percentage employment of male and female in the Cultural Creative industries by gender between 2021 to 2023.

Overall, the analysis of creative economy employment has improved after the COVID_19 pandemic, indicating the resilience of the employees in the various domains of creative economy. However, a particular concern is that early career creatives have been shown to be more negatively affected than older age groups, which threatens both the continued transformation and the sustainability of the creative economy in South Africa.

3.2.3. Post COVID projections on employment in the Cultural and Sports Occupations

Whereas COVID-19 put a dent on longer-term growth in cultural and creative employment, its importance is likely to continue to grow in the future. This is because cultural and creative jobs tend to be highly skilled, thus a lower share (10%) are at high risk of automation than in the labour market more generally (14%) (WEF, 2023). The challenges of the COVID-19 pandemic have paved the way for new opportunities for the creative economy to flourish and innovate. It was during the crisis that the indispensable role of the sector was made clear, as many turned to cultural and creative content as a respite during lockdowns.

Digitalisation will likely lead to an uptick in the demand for cultural and creative skills, while also transforming these jobs in other ways, for example in terms of how cultural goods and services are produced and disseminated (M'Hammdi and Jaïdi, 2022). Further, since the first quarter of 2019, a majority of countries have experienced employment growth in Professional Services, Education and Training, Health and Healthcare, and Government and Public Sector, but employment in the Supply Chain and Transportation and Media, Entertainment and Sports sectors lags behind 2019 levels (WEF, 2023). Similarly WEF forecasts a structural five-year churn of 32% employment in the Media, Entertainment and Sports industries, where respondents estimate between 2023 and 2027 (WEF, 2023).

Further, governments and policymakers will need to consider the full cultural value chain and ensure integrated policies for education, training and jobs. The Rome Declaration of the G20 Ministers of Culture is an encouraging sign in this direction as it recognizes: 'the need to enable cultural and creative professionals with new capabilities, including creative, digital, technological, managerial, accessibility-related, mediation and environmental to overcome the deep uncertainties of the post-COVID-19 operational landscape and to contribute to building more sustainable, resilient and inclusive societies and economies'. importantly, governments will also need to address the distribution of opportunities and revenues in the light of the increasing market dominance of streaming platforms. The ability to create and retain jobs will be central to the viability and diversity of cultural and creative sectors. Moreover, it will be crucial to introduce and strengthen legislative stability for social benefits that recognize the diverse types of cultural employment. (UNESCO, 2022)

The COVID-19 pandemic has both aggravated existing challenges for the culture sector and introduced new issues that will have medium to long-term consequences. The sector has been forced to develop new ways of working or to adopt emergent tools at an accelerated pace. The speed and intensity of change experienced by the sector over the past two years has created a strategic momentum and opened the door to a reframing of the value proposition of culture, as a vital steppingstone to a more equitable and sustainable economy. According to UNESCO (2022) the key trends reshaping the culture sector in response to the pandemic and outlines include:

- Enhanced emphasis on the culture sector's social value
- Growing awareness of the importance of ensuring the livelihoods of artists and cultural professionals
- Rise of collaboration and increased sectoral solidarity
- Accelerated adoption of digital practices and techniques
- Adaptation of strategic, operational, and business practices across the value chain

COVID-19 has impacted the future of sports careers. So, some jobs will be accompanied by many changes. Hosting sports events will require compliance with health protocols, which will indicate a change in the status of jobs related to the events. Some jobs will be held using the internet and cyberspace, and some services will be restricted. In such a situation, sports organizations should be careful about employees' and athletes' health and economic status. Special insurances should be provided for them with proper support, and they should also pay attention to improving the economic situation of organizations. In the future, the SDGs' implementation and observation of international human rights standards should be part of building, planning, and running mega-sporting events (UN 2021).

4. GROSS VALUE ADDITION AND QUARTERLY TRADE BY PROVINCE AND METRO

4.1. Quarterly Gross value Addition

The creative and sporting industries contributed 2.97% to the GDP of South Africa in 2020, according to the 2022 SACO report. This situates the CCI&S in the same category as agriculture, in terms of GDP contribution. The 2021 GDP is estimated at 4% of South Africa's GDP, inclusive of the Sports and Recreation domain.

In terms of GVA, on a provincial level, Gauteng has maintained the highest contribution in 2021Q1-Q4. Gauteng is followed by KZN, although with less than half of Gauteng's contribution. In the third place is Western Cape, then Eastern Cape. Different provinces record different dominant domains. In Gauteng and Western Cape, the highest contributor is the design and creative domain, while in KwaZulu Natal the dominant domain in GVA terms is sports and recreation. There is a general consistency in the quarterly data in terms of the high and the low GVA contributors.

Turning to the metro's, in harmony with the foregoing, Gauteng's City of Johannesburg had the highest GVA (at R7.2 billion) in 2021Q4, a notable increase from R6.4billion in 2021Q1. The City of Tshwane recorded 4.5billion in 2021Q4, up from R4billion in 2021Q1. While the City of Cape Town made as much contribution as the City of Tshwane in 2021Q1 (R4billion), the City of Cape Town exceeded the City of Tshwane in 2021Q4 (R4.8billion). The least consistent contributor is Buffalo City followed by both Nelson Mandela Bay and Mangaung. Through 2021, the growth of these metros have been negligible.

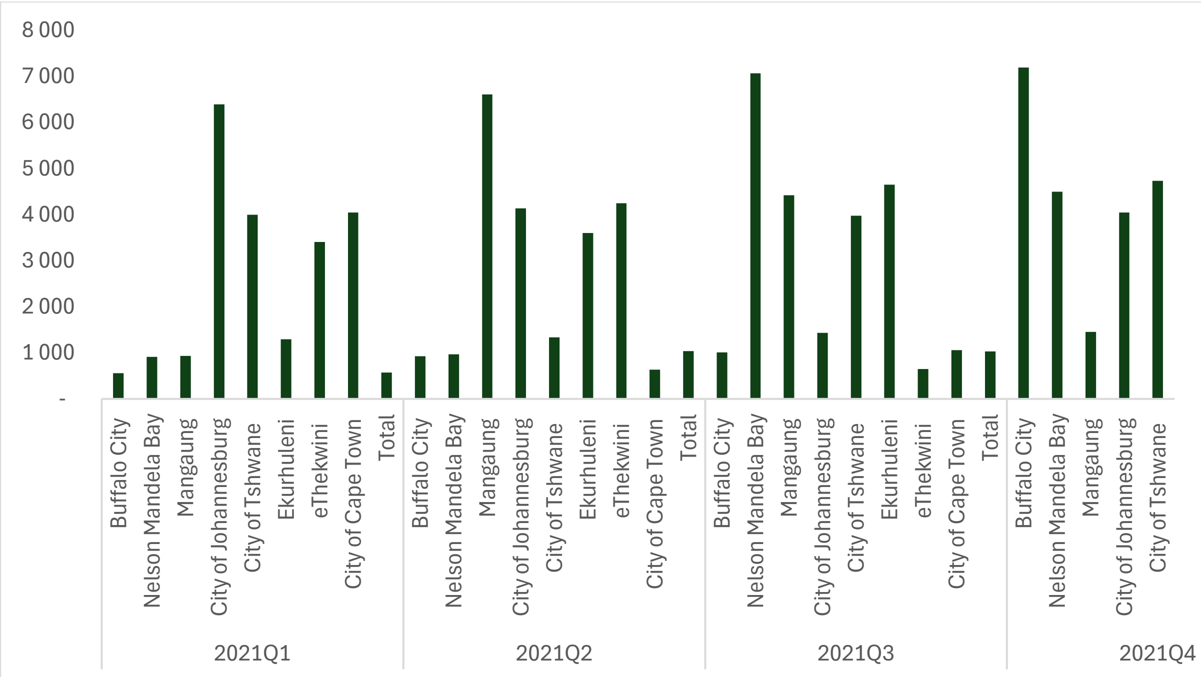

Figure 24: Gross Value Add of the creative economy by metro (2021)

4.2. Trade in the South African Creative, Cultural and Sporting Industries

4.2.1. Exports Trends in the Cultural, Creative Industries & Sports

Provincial quarterly exports of CCI&S have been fluctuating, between 2021 and 2022. The highest export revenues were generated in 2021 Q4, dipping to the lowest in 2022 Q1. General export decline is visible between Q2 of 2022 and Q4 of 2022, consistent with the global decline of CCI&S as well South Africa's poor economic performance (Figure 25).

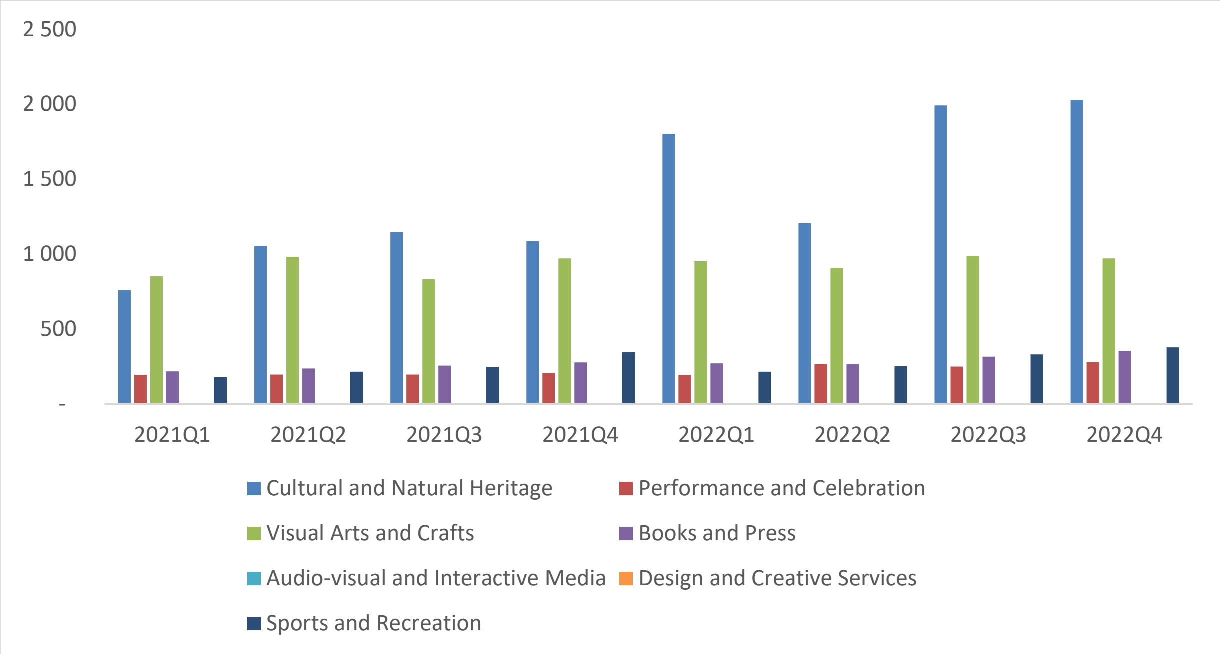

Figure 25: Consolidated provincial quarterly Exports (R millions).

Data Source: Statistics South Africa, Quantec

On provincial performance of the CCI&S, as illustrated above, the Western Cape has consistently taken the lion's share throughout the period under assessment. Gauteng follows, then KwaZulu Natal.

In Q1 of 2021, the Western Cape recorded exports of ZAR 936 million, which increased steadily to just over R1.3 billion in quarter 4 of the same year. Still on Western cape, export records an increase to R2 billion in 2022 Q1, declining toR1.2 billion in 2022 Q2 before increasing to R1.77 billion in 2022 Q3 and then R1.71 billion in 2022 Q4. The Western Cape trend reflects all other provinces, as illustrated above. Gauteng is the second largest exporter of cultural and sports goods, with exports increasing from R761 million in2021Q1 to R1.7 billion in 2022Q4. Northern Cape is the worst performer quarter on quarter exports in both years under assessment (2021 and 2022), followed by both North West and the Free State. The 2022 provincial fluctuations of export figures could be attributed to global economic fluctuations in 2022. Evidently, the CCI&S responds rapidly to economic movements, -whether growth or decline (Figure 26).

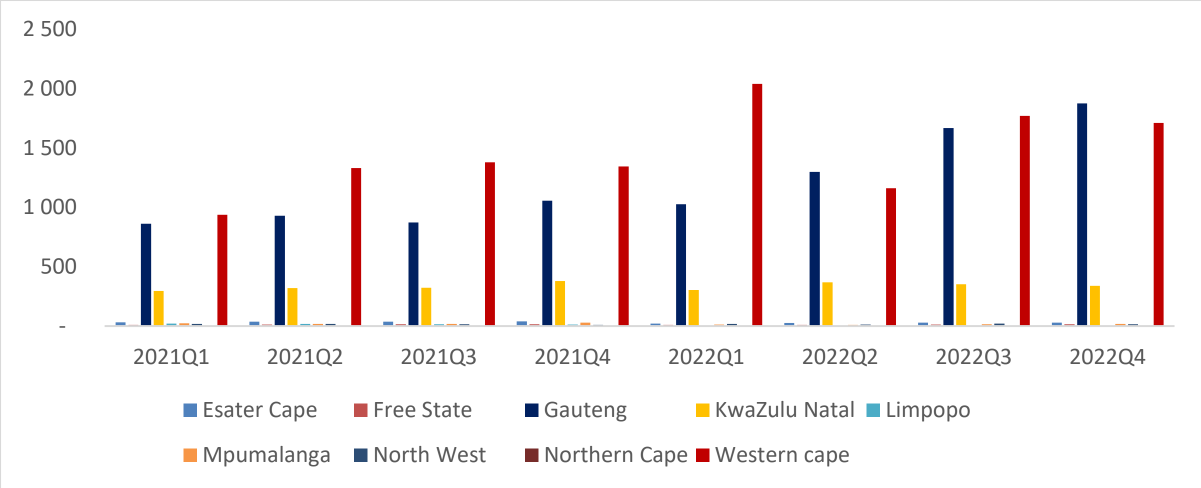

Figure 26: Quarterly Exports by province (ZAR millions).

From a metro perspective, City of Cape Town was the largest exporter of cultural and sporting goods in 2021Q4, aligning with the fact that Western Cape is the largest exporter of cultural and sporting goods. It is followed by City of Joburg, City of Tshwane and City of Ekurhuleni. eThekwini ranks fifth in the same period.

The data shows increases in exports of cultural and sporting goods for most metros, except for eThekwini and Mangaung. eThekwini ranked third of the eight metros in 2021Q1, and recorded R256 million exports. In 2022Q4, eThekwini ranked fifth and recorded exports of R241 million, a slight declining in the exports of cultural and sporting goods from eThekwini.

On the other hand, City of Tshwane and City of Ekurhuleni have performed relatively well in terms of growing their exports over the period of analysis. Nelson Mandela Bay, Buffalo City and Mangaung are the least exporters of cultural and sporting goods.

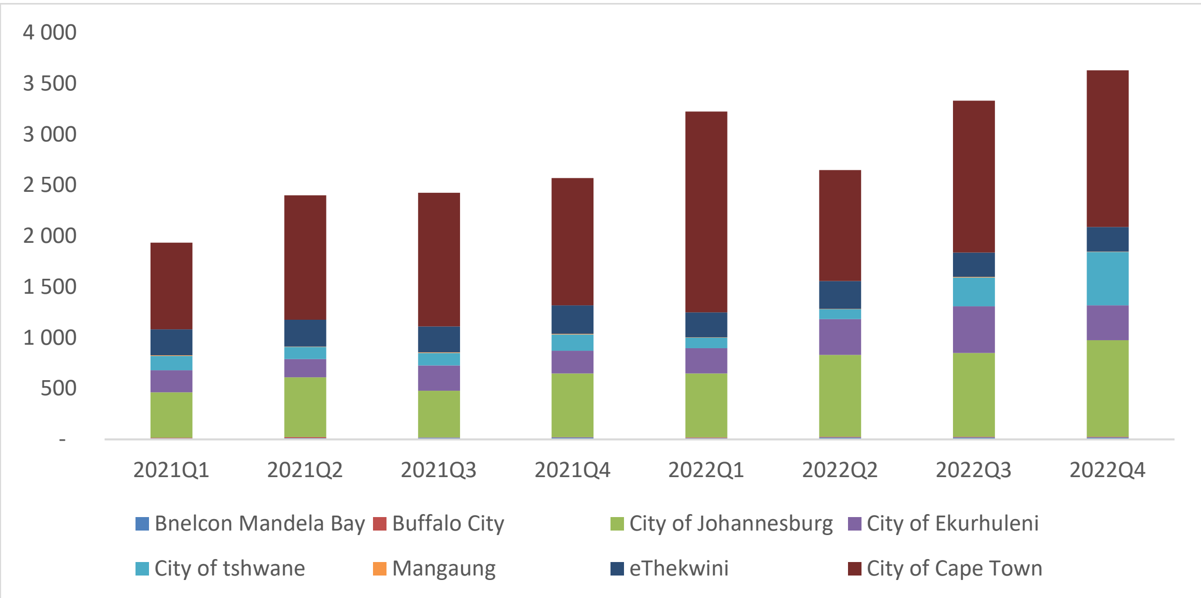

Figure 27: Quarterly metro exports, R Millions

The metro exports by domain show that Cultural and Natural Heritage and Audio-Visual and Interactive Media were the main exporters during the period under review. Generally, the data shows increasing trend for all domains, with the most growth recorded in the Cultural and natural Heritage and Sports and Recreation domains.

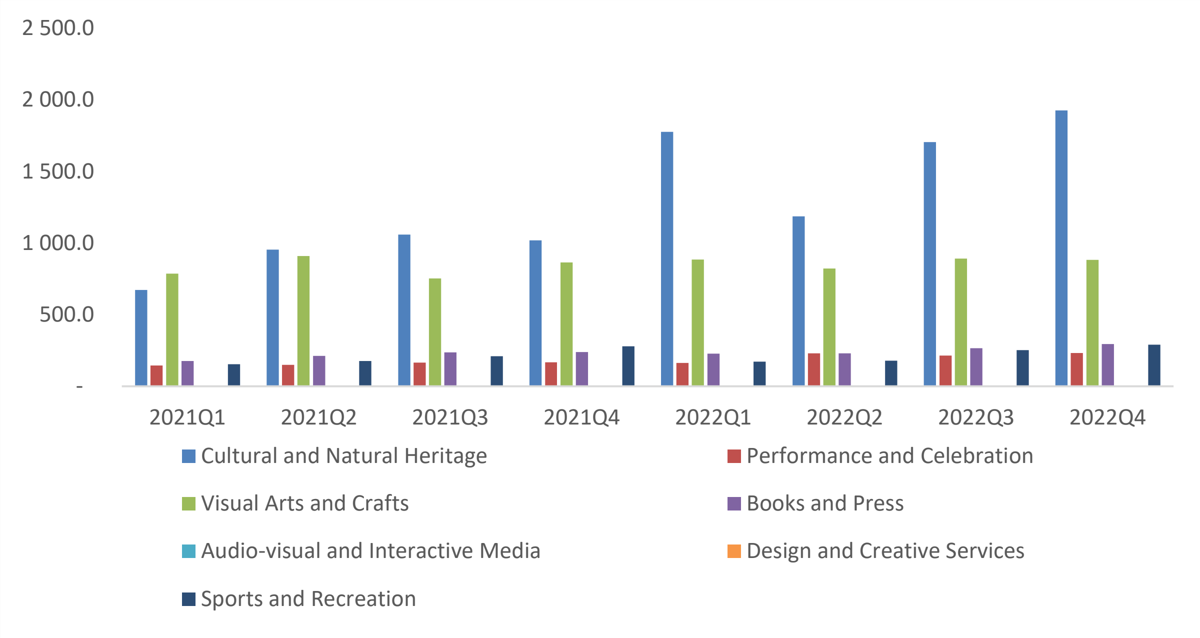

Figure 28: Quarterly metro exports by domain, R Millions

4.2.2. Imports Trends in the Cultural, Creative Industries & Sports

In terms of imports, evidently, Gauteng, which has the second highest exports, records the highest imports of creative and sporting goods followed by Westen Cape, which is the largest exporter of CCI&S goods.

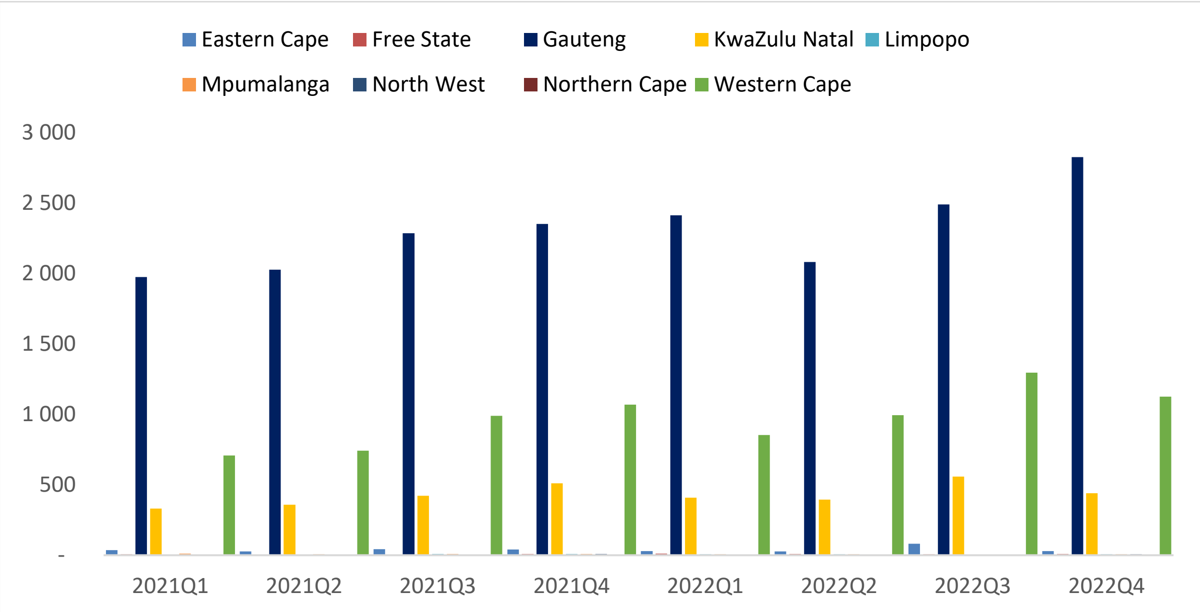

Figure 29: Quarterly provincial imports, R Millions

Imports of sporting goods is the largest, followed by Cultural and Natural Heritage and Audio-Visual and Media domains. Gauteng recorded the largest imports of sporting goods, followed by Western Cape.

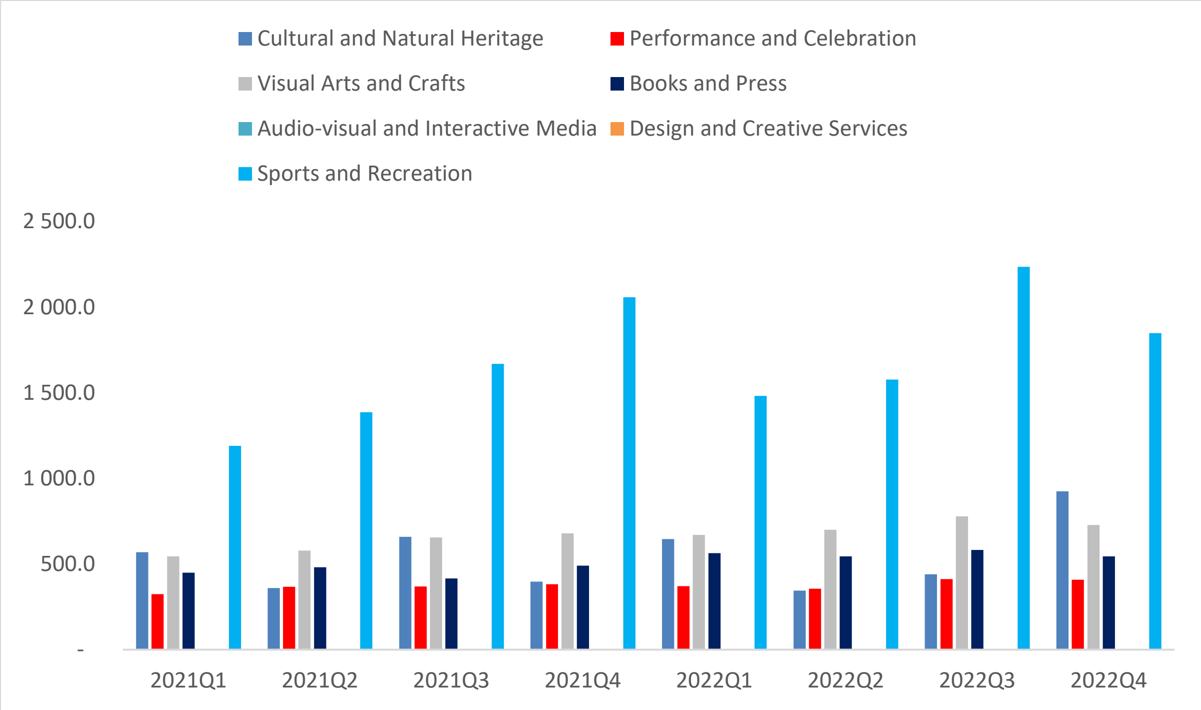

Figure 30: Quarterly provincial imports by domain, R Millions

From a metro perspective, City of Joburg recorded the largest proportion of imports, followed by Western Cape. This is consistent with the provincial data which showed that Gauteng was the largest importer of CCI&S goods, followed by Western Cape.

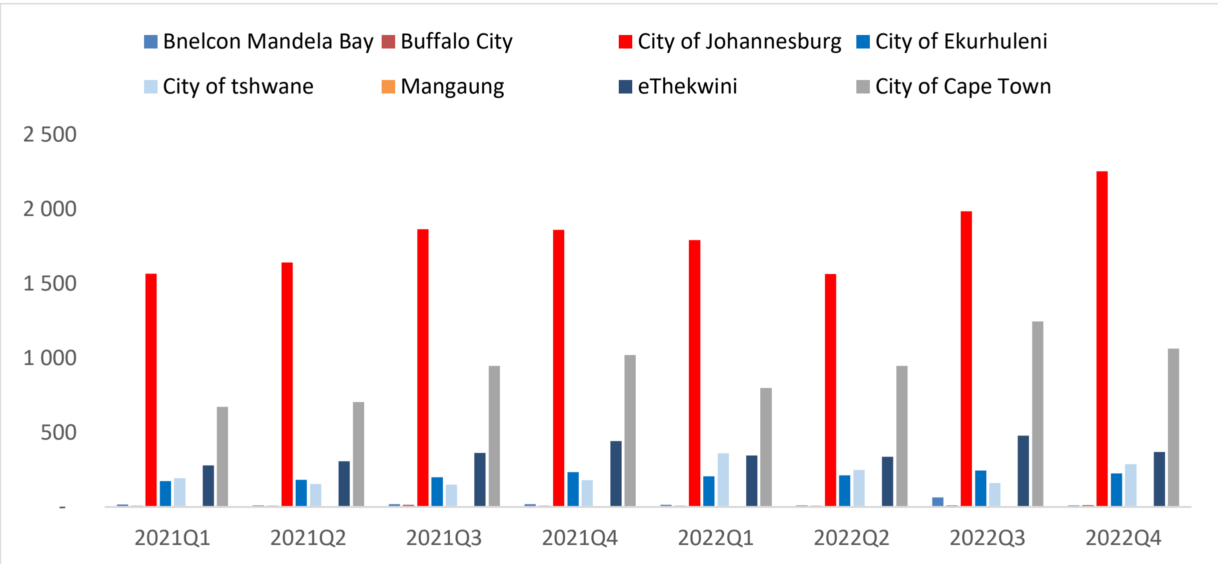

Figure 31: Quarterly metro imports, R Millions

The metro imports were dominated by the sports and recreation domain, in alignment to provincial trends. Similarly to exports by domain, the most growth is seen in the imports of Cultural and Natural Heritage and Sports and Recreation.

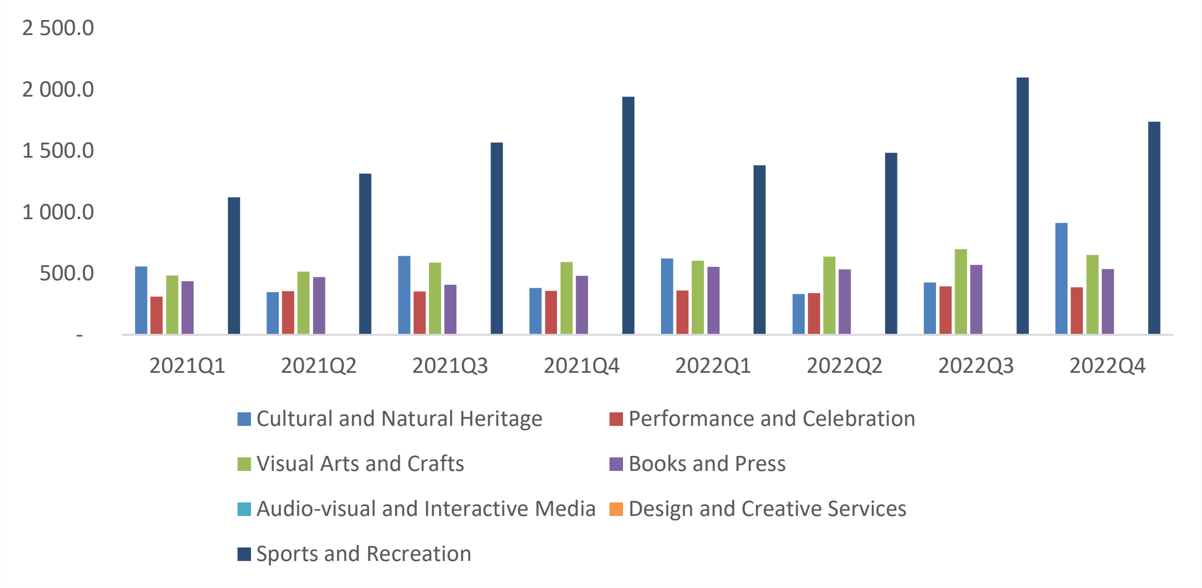

Figure 32: Quarterly metro imports by domain, R Millions

5. CONCLUSION AND RECOMMENDATIONS

5.1. Conclusion

The cultural, creative industry and Sports plays a major role in the global economy and in South Africa, employing 8.8% and 6% respectively. On a global scale, the sector has more than doubled between 2002 and 2011. The global sports industry is equally significant, totalling to some US $ 512 billion in 2023 and projected to grow to US$ 624 billion in 2027 (BRC, 2023). Hosting international sports events such as the Olympics, FIFA World Cup, or the Super Bowl contribute to significant economic development in countries particularly in promoting foreign capital inflows and generating both local and international employment opportunities (Yehyia, 2018).

In South Africa, the CCI&S shows evidence of increasing diversification particularly among different population groups. More data, however, need to be produced and disseminated for future policy and programming.

5.1. Recommendations

I. Statistical data on the CCI&S in Africa is quite limited and some are conflicting depending on the model used. It is recommended that a data portal be set up, to capture and track CCI &S data on a national and provincial level.

II. Statistical data on information on the sporting industry both globally, regionally and in South Africa are limited. Some studies done by BRC are available but are not accessible since one must purchase the report. SACO could consider managing an open source system,-and to the extent possible, purchase these kinds of reports.

III. In terms of sports outlook in Africa, one report is publicly available but in French. SACO could consider collaborating with continental and UN bodies to provide periodic publications and/or briefs on the CCI&S industry.

IV. Particularly, the sporting industry employment domain, distribution of jobs across different domains and gender is limited. Data should be disaggregated into gender (and youth), and analysis /reports should clearly outline these demographics.

V. Some documents such as WEF, 2023, combines the creative and sporting industries in the provision of employment data. This is a good start,-and effectively, SACO should henceforth combine /maintain data on both sectors.

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