south african
cultural observatory

Final Report

Cultural Employment and Transformation

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

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

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South African Cultural Observatory

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2025

Executive Summary

This report presents a comprehensive analysis of South Africa's Cultural, Creative, and Sports (CCI&S) sectors, focusing on their economic impact, employment trends, and trade performance. The study leverages official national data to contextualize the South African CCI&S landscape within broader global and continental economic dynamics, underscoring its growing strategic importance.

Key findings indicate that the CCI&S sector is a significant contributor to South Africa's economy, representing about 7% of national employment. However, this figure lags behind the global average for broader creative economy employment, revealing untapped potential for sector expansion. Analyzing employment trends from 2021 to 2024 reveals fluctuating yet positive growth, with notable surges between 2023 and 2024. Audio-Visual & Interactive Media, Design & Creative Services, and Books & Press consistently emerged as leading employment generators, while Cultural & Natural Heritage and Sports & Recreation experienced comparatively weaker growth.

Geographic analysis demonstrates a pronounced concentration of creative economy employment in Gauteng, followed by the Western Cape, KwaZulu-Natal, and Limpopo, highlighting regional disparities that require targeted strategies to benefit from missed opportunities. Similarly, transformation shows men more represented than women in the sectors are generate more revenue. Even though there has been an improvement in women participation in the CCI&S industries, women are concentrated in the low value work. Moreover, enterprise ownership is centered around the white South Africans. Policy makers need to prioritize targeted programmes to ensure the diverse South African households all participate in the CCI&S industries.

Priority Recommendations:

This report highlights critical gaps that include targeted policy frameworks, data infrastructure, access to reliable industry data, and limited collaboration at continental and international levels, inhibiting precise analysis and effective policymaking. The study recommends:

- targeted policies to support the domains in various provinces;
- establishing a unified data portal;
- enhancing access to industry-specific information; and
- fostering regional and international collaboration to generate periodic trend analysis and country profiles for policy guidance.

Additionally, the report emphasizes the importance of disaggregated data for gender and youth inclusion and a holistic approach to integrating creative and sporting industries data to inform targeted policies and promote equitable and sustainable growth within these vital sectors.

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Abbreviations

ASGISA	Accelerated and Shared Growth Initiative for South Africa
CCI	Cultural and Creative Industries
CCI&S	Cultural and Creative Industries and Sectors
CIGS	Cultural Industries Growth Strategy
EU	European Union
GDP	Gross Domestic Product
GVA	Gross Value Added
LMDS	Labour Market Dynamics Survey
NIPF	National Industrial Policy Framework
NDP	National Development Plan
QLFS	Quarterly Labour Force Survey
SA-SIC	South African Standard Industrial Classification
SASCO	South African Standard Classification of Occupations
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
VR	Virtual Reality
AR	Augmented Reality

1. Background and Context

The Cultural and Creative Industries and Sports (the CCI&S) are an important yet underrated sector in almost every economy worldwide. Their combined output contributes to economic, environmental, and socio-cultural progress. The CCI&S encompasses a diverse range of sub-sectors and value chains, including but not limited to design, fashion, audio-visual, cultural heritage, video games, architecture, performing arts, sports entertainment, merchandising, and media rights. These sub-sectors demonstrate a robust innovation capacity and maintain close connections to other sectors of the economy. This connection is facilitated through creativity, design, and the adoption of new organisational processes and business models.[1] As one of the fastest-growing sectors globally, the CCI already accounts for an estimated 3.1% of global GDP and provides employment for 6.2% of the world's workforce. Sports, recreation and their related industries accounted for $512 billion globally in 2023, and are projected to reach $624 billion in 2027 (Business Research Company, 2023). Looking ahead, the sector is projected to experience continued rapid expansion, with forecasts anticipating that the CCI&S will contribute a remarkable 10% of global GDP by the year 2030, solidifying its position as a powerful driver of economic and social progress.

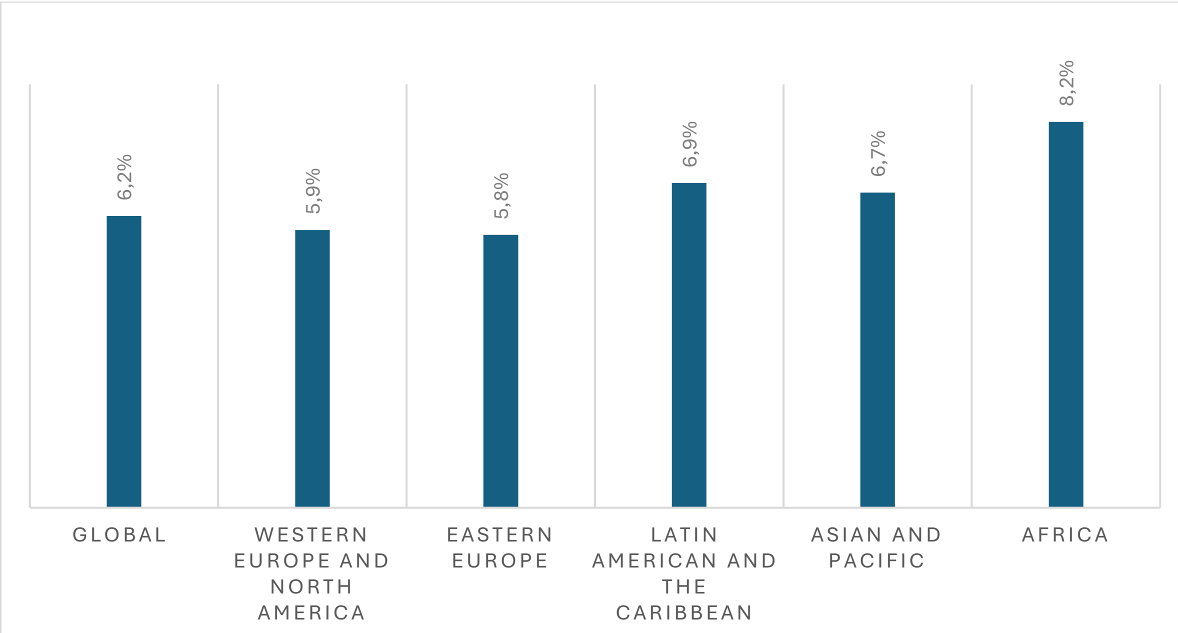
A report by UNESCO highlighted that almost 50 million people work in the CCI&S and its various sub-sectors worldwide; more than three times as many as in the global automotive industry, which employs roughly 14 million workers. Nearly half of those working in the CCI&S are women. The CCI is also growing in emerging economies, as it accounts for nearly $58 billion in sales (3 % of the total) and 2.4 million jobs (8 % of total CCI jobs). The CCI&S covered 1.1 % of regional GDP in the Middle East and Africa. A recent study conducted in 2021 by UNESCO, focusing on the film and audiovisual industry in Africa, has projected the potential to generate annual revenues of $20 billion USD and create over 20 million jobs through additional investment.

Across Africa, CCI&S thrive as a vibrant and multifaceted landscape, mirroring the continent's profound cultural heritage, its boundless innovative spirit, and its captivating artistic expressions. Encompassing a rich tapestry of disciplines—from the striking visual arts and diverse musical genres to the power of literature, the dynamism of fashion, the cinematic world of film, and the ingenuity of design—the African creative industries are increasingly garnering global recognition for their distinct and invaluable contributions to the world stage. Historically, African music has exerted a powerful influence, playing a pivotal role in shaping the evolution of popular music across both North and South America, as well as in Europe. Moreover, the rich cultural wealth inherent in African societies is now increasingly leveraged to capitalize on the unprecedented opportunities presented by advancements in cutting-edge technologies and the expansion of commercial markets. Notably, the film sub-sector serves as a primary engine for employment growth within the African CCI&S, with shining examples such as the meteoric rise of Nollywood, the Nigerian film industry. Nollywood is not only a cultural phenomenon but also a significant economic force, estimated to provide direct employment for approximately 300 000 individuals and

[1] https://unesdoc.unesco.org/ark:/48223/pf0000380475

contributing substantially to the Nigerian economy, demonstrating the immense potential of the African CCI to drive both cultural preservation and economic prosperity.

Figure 1: Share of people in cultural employment



Source: UNESCO 2022

South Africa has consistently recognized the CCI&S potential as a driver of both economic prosperity and social progress, a commitment reflected in various national strategies and policies. The foundational national policies include the Cultural Industries Growth Strategy (CIGS, 1998), followed by other policies not specifically aimed at the industries, but policies that support development including the Accelerated and Shared Growth Initiative for South Africa (ASGISA), the National Industrial Policy Framework (NIPF), the New Growth Path (NGP), and the National Development Plan (NDP). The most recent policy that maintains the industries importance includes the Mzansi Golden Economy (MGE) strategy, aimed at promoting jobs within the industries given their undeniable potential. Moreover, the Department of Sport, Arts and Culture (DSAC) and Basic Education continue to explore strategies to transform sports and cultural programmes at schools, accelerating their access. DSAC further advocates for the industries to contribute to the Sustainable Development Goals. This sustained emphasis demonstrates the government's formal acknowledgement of the creative industries and their significant role in fostering sustainable social and economic development. South Africa's rich and vibrant arts and culture heritage stands as one of its most valuable assets, possessing the capacity to generate substantial economic and social benefits for the nation. The government and other stakeholders increasingly understand and acknowledge the cultural and creative industries' potential to contribute significantly to the country's economy. According to SACO (2022), industries contributed R161 billion in 2020, which accounts for 3% of GDP. The sports also make an important contribution in South Africa’s GDP. The industry is estimated to add about R50 billion annually to GDP (DSAC, 2022). Jobs are created in the sports industries themselves and in related industries, stimulated by tourism.

Figure 2: Recent facts and figures about the creative economy

In 2022, **China's** cultural industry reached an operating income of 16.5 trillion yuan (US$ 2.3 trillion). China's cultural industry reached 1.3 trillion yuan (US$ 180 billion) in total profit.

In 2020, the cultural and creative sectors in Egypt accounted for 3% of GDP. In 2008, the sector was
estimated to employ 2 million people.

In 2019, Nigeria's creative industries employed roughly 3.2 million people or
6% of total employment

In 2020, **South Africa's** cultural and creative industries to GVA was 3% and in 2019, the sector employed 4.1% of the workforce (equivalent of 679,900 jobs).

In 2022, creative industries made up 2.4% of Mauritius' GDP.

In 2018, Peru's partially copyright-based industries accounted for 3.8% of the national value added, and 4.1% of total employment.

In 2019, the film, animation, and music industries made up 6.2% of Jamaica's GDP

In 2022, the cultural and creative industries accounted for 3.4% of GDP, 10.2% of registered business entities, and 4.5% of the
Workforce in Montenegro.

Source: 2024 UNCTAD survey on the creative economy

Beyond this economic impact, the CCI&S has far-reaching effects on various aspects of society and the environment, correlating with the Sustainable Development Goals (SDGs). The CCI&S is undergoing a profound transformation driven by ongoing digitalization. This digital shift has fundamentally altered the creation, distribution, and consumption of cultural and creative products. The CCI&S embrace of both emerging and established technologies not only reflects the sector's adaptability but also positions it as a key contributor to the broader technological revolution, stimulating innovation across other sectors of the economy. Digital technologies are fostering the emergence of entirely new CCI&S sub-sectors, such as animation, virtual reality (VR), augmented reality (AR), and gaming, while also enabling traditional, non-digital CCI&S sub-sectors like fashion and music to leverage digital sales channels and expand their reach. These technological advancements have significantly reshaped the composition of creative goods and services exports over the past two decades, with notable increases in exports of audio media and video games. Furthermore, during the COVID-19 pandemic, digital creative services demonstrated remarkable resilience compared to other service sectors, highlighting the adaptability and importance of digital strategies within the CCI&S.

1.1. Study Objectives

This chapter presents a comprehensive and granular analysis of the CCI&S industries, focusing on trends in key economic indicators: employment levels and enterprise ownership. Acknowledging data limitations that necessitate staggered analytical periods, the chapter examines employment from 2021 through 2024, the general trends in ownership, and trends across provinces. The study methodically contextualizes the South African CCI&S sectors within the broader dynamics of global and continental economies, articulating the rationale for their growing strategic importance and influence in the economy. This contextualization includes a discussion of key policy initiatives and emerging market trends impacting the sectors.

A significant challenge addressed within this chapter is the persistent scarcity of reliable and consistently gathered data pertaining specifically to the sports sector at the global, continental, and South African levels. This data deficit is primarily attributed to conventional clustering methodologies within creative industry classifications, which frequently exclude or underrepresent the economic activity generated by sports. While this report strives to integrate available sports-related data wherever methodologically sound, the deliberate omission of sports from certain analyses is, unfortunately, unavoidable due to the limitations of available data. Recognizing this constraint, the chapter endeavors to provide targeted and nuanced insights into the sports sector by conducting separate analyses of available sports data whenever feasible, highlighting unique trends and challenges within that domain. This approach ensures that while the overarching analysis may be weighted toward the cultural and creative segments, the importance of the sports sector is not entirely overlooked.

In addition to the macroeconomic analysis, the chapter provides a detailed examination of the social demographics characterizing the workforce employed within the South African CCI&S sectors. This includes analyses of age distribution, gender representation, educational attainment, and geographic distribution of workers, offering insights into the social and human capital dimensions of these industries.

1.2. Methodology

The data presented in this report is from official national data collected by Statistics South Africa. The Quarterly Labour Force Survey (QLFS) is a household survey conducted every three months, which is then pooled into an annual dataset called the Labour Market Dynamics Survey (LMDS). The LMDS data is currently available from 2008 to 2019. The survey covers the entire national population. Based on a master sample, it is carefully designed to be as representative of the population as possible. The sample is divided equally into four subgroups or panels called rotation groups. Each subgroup is surveyed in rotation once a year (Statistics South Africa, 2008).

Survey weights are also constructed such that all persons in a household would have the same adjusted base final weight. Applying the survey weights for the data collected from the sampled households (as was done in this study) ensures that the responses can be properly expanded to represent the entire population of South Africa (Statistics South Africa, 2014).

It should be noted that, for the 2015 LMDS, the sample was changed. Until 2014, the sample was based on information collected during the 2001 population census. It covered 30 000 dwellings distributed across 80 787 enumeration areas. In 2015, the master sample was updated and is now based on the Census 2011 results. The master sample was increased by 8% so that it now covers 33 000 dwellings. It enables more accurate identification of sub-groups (especially within metropolitan areas and in the mining sector) and adjusts for population movement between provinces (Statistics South Africa, 2014 and 2015).

The change in the master sample in 2015 may have an impact on the comparison of results relating to employment in the CCI&S over time. While still comparable with data from previous years, it may be that sudden changes are partly the result of the sample change and may also be caused by the UNESCO weighting system applied to the LMDSA data set to estimate the size of the cultural industries. Currently, the South African Labour Force Survey (LFS) uses a coding system for occupations and industries based on SASCO-2001 and SA-SIC-5-1993. Officially, South Africa uses the South African Standard Classification of Occupations, 2nd edition, 2012 (SASCO-2012) and the Standard Industrial Classification, 7th edition, 2012, (SA-SIC-7-2012), but this does not seem to have been applied yet to the LFS data.

For industry classifications, a major constraining factor was that, even once the UNESCO classifications had been mapped to the system currently used in South Africa (SA-SIC-5-1993), identification of cultural industries was not possible because the available data is at the three-digit code level, and the four-digit level is needed. However, the UNESCO manual offers a way of *estimating* the employment contribution of cultural industries using three-digit SIC codes, which is what was used in this report. The technical discussion on how cultural industries were identified in the South African data is contained in Appendix 2.

The annual pooled Labour Market Dynamics Survey dataset for 2020 was not yet available at the time of writing. In order to examine the impact of the COVID-19 crisis on cultural occupations and cultural industries in 2020, data from the Quarterly Labour Force Survey (QLFS) was used. While the QLFS has a smaller sample size, which allows for less detailed analysis, it still provides some interesting insights. Because sample sizes are relatively small, standard errors are large. However, they can be used to provide indications of patterns within the cultural trident.

1.3. Basic Concept of CCI&S and Cultural Occupations

Despite its growing recognition, a universally accepted definition of CCI&S continues to be a challenge. Different organizations involved in this field have developed their own definitions, each emphasizing particular facets and characteristics of the sector. Although a universally agreed-upon definition remains elusive, several key organizations offer distinct perspectives on the CCI&S. The United Nations Educational, Scientific and Cultural Organization (UNESCO), drawing from its focus on culture, emphasizes the various levels and value-adding stages of cultural productions, highlighting their artistic and cultural heritage origins.[2] In contrast, the United Nations Conference on Trade and Development (UNCTAD), guided by its trade mandate, underscores the importance of broadening the concept of creativity beyond purely artistic endeavors. UNCTAD's definition encompasses any economic activity that generates symbolic products for the marketplace and relies heavily on intellectual property rights.[3] The European Union (EU) uses the term "cultural and creative sectors," also placing a strong emphasis on the value-adding dimension of the sector.[4]

[2] UNESCO (2015): Cultural Times: The First Global Map of Cultural and Creative Industries
[3] UNCTAD (2008): Creative Economy Report 2008
[4] European Commission (N/A): Cultural and Creative Sectors

The lack of a universally agreed-upon definition of the Cultural, Creative and Sport Industries (CCI&S) stems from a confluence of factors that contribute to the complexity and multifaceted nature of the sector[5]:

1. **Diversity of Activities:** The CCI&S encompass a vast and diverse array of sub-sectors and activities, ranging from the performing arts and visual arts to design, fashion, film, literature, music, digital media, and sports and recreation. Each of these sectors possesses its own unique characteristics, creative processes, and contributions to both culture and innovation, making it challenging to find a single definition that adequately captures the nuances of each. As a result, definitions of the CCI&S often vary depending on the specific focus and priorities of the interventions or policies being implemented, leading to a fragmented understanding of the sector as a whole. A definition geared towards supporting artistic expression might differ significantly from one aimed at promoting economic growth through creative industries.
2. **Evolving Nature:** The industry is characterized by its inherent dynamism and constant evolution, driven by a complex interplay of factors that include rapid technological advancements, shifting consumer preferences and tastes, and ongoing transformations in socio-cultural contexts. As new forms of cultural expression emerge, often enabled by technological innovations, and as existing industries adapt and reinvent themselves to remain relevant, definitions of the CCI&S must be inherently flexible and adaptable. These definitions need to effectively capture the constantly evolving landscape of the sector, ensuring they remain accurate and reflective of the ever-changing nature of creative activities and industries in the 21st century. A static definition would quickly become obsolete, failing to encompass the new forms of creative expression and economic activity that continually arise within the CCI&S.
3. **Geographic Variations:** The parameters of the industry are not universally fixed; their definitions are often contingent upon the specific geographic context under consideration. What is recognized and categorized as belonging to the CCI&S in one region or country may differ significantly from another. These variations arise due to a complex interplay of factors, including differences in deeply rooted cultural heritage and traditions, the unique structures of local economies, the prevailing policy priorities of governments, and the varying stages of technological development. Consequently, a definition that accurately reflects the CCI&S in a country with a strong tradition of craftsmanship may not be appropriate for a region where digital media and technology-driven creative endeavours dominate. Therefore, a nuanced understanding of the local context is crucial when defining and analysing the CCI&S.

[5] https://www.giz.de/en/downloads/giz20224-en-understanding-cultural-and-creative-industries-and-designing-approaches-for-its-development.pdf

Definitions of the CCI in detail:

UNESCO emphasizes the different levels and value-adding steps of cultural productions and focuses on their artistic/cultural heritage origins:

- ✓ "Those sectors of organised activity that have as their main objective the production or reproduction, the promotion, distribution or commercialisation of goods, services and activities of content derived from cultural, artistic or heritage origins."

The UNCTAD stresses the relevance of extending the concept of creativity from exclusively artistic activities to "any economic activity that generates symbolic products for the marketplace and is strongly based on intellectual property rights". It lists the following characteristics of the creative industries:

- ✓ "are the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs;
- ✓ constitute a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights;
- ✓ comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives;
- ✓ are at the cross-road among the artisan, services and industrial sectors".

The EU uses the term 'cultural and creative sectors' and thereby describes

- ✓ "all sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management."

4. **Methodological Differences:** The task of defining the industry is further complicated by the fact that different organisations, researchers, and policymakers often employ varying methodologies and analytical criteria when attempting to delineate the sector's boundaries. These differences in approach can stem from a range of factors, including the specific research questions being addressed, the availability of data, the theoretical frameworks being utilized, and the policy objectives being pursued. As a result of these methodological variations, the scope and boundaries of the industries considered to fall within the CCI&S can differ significantly, leading to a proliferation of diverse and often conflicting definitions. For instance, one study might emphasize the economic contribution of the CCI&S and therefore adopt a broader definition encompassing a wider range of activities, while another might focus more narrowly on the cultural or artistic value of creative outputs, leading to a more restrictive definition.

1.4. Definition by sub-sector, domains, and concentric circles

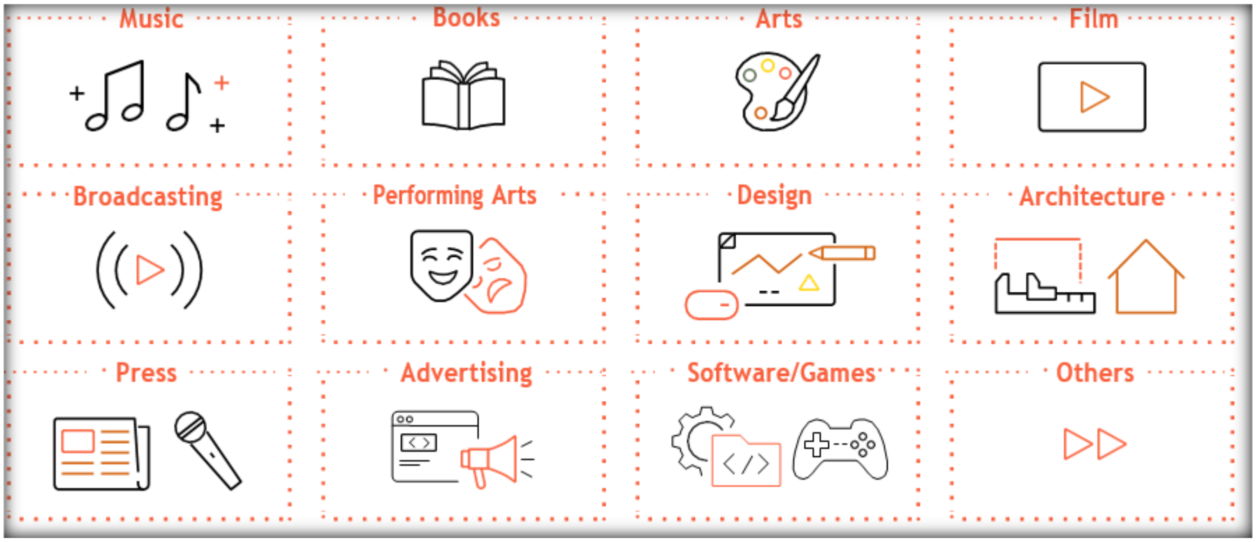
Given the lack of a single, agreed-upon definition, numerous approaches have emerged to understand CCI&S, each differing in which sectors they include or exclude, how they group these sectors, and how they relate them to one another. Examining these various definitions through the lens of sub-sectors, domains, and conceptual models such as concentric circles allow for the design of nuanced and context-specific interventions tailored to the unique characteristics of different regions and industries. A solid understanding of these diverse approaches is essential for effectively navigating the complex landscape of the CCI and addressing the unique challenges and opportunities presented by its multifaceted nature.

Definition by Sub-Sectors

The study encompasses the Cultural, Creative and Sports Industries. This section starts by defining the CCI as defined by UNESCO, then outlines the Sports and Recreation definition. The method of defining the CCI relies on categorizing the sector into specific sub-sectors or industries, with each definition grounded in a set of economic sectors directly attributed to the CCI. While a degree of international consensus exists regarding the inclusion of certain core sub-sectors, such as visual arts, performing arts, audiovisual media (film, television, radio), music, and print media, disagreements arise when considering other areas. These areas of contention often include sectors related to cultural heritage, particularly those without a primarily commercial focus (e.g., museums, cultural heritage sites, libraries, and traditional arts and crafts), as well as design and digital-based activities (e.g., design, architecture, fashion, advertising, software, and multimedia).[6] Furthermore, debates persist about whether intellectual and digital services like research and development, or related industries such as leisure/entertainment activities, and upstream/downstream goods and services (e.g., textiles, telecommunications, technical equipment manufacturing), should be encompassed within the CCI definition. Despite these complexities, sub-sector models provide a valuable framework for targeted analysis and intervention within specific areas of the CCI.

[6] BOP Consulting & Dr. Nimry, Faris (2013): Developing Creative Industries in Jordan: A Call to Action.

Figure 3: Sub-sectors of the CCI



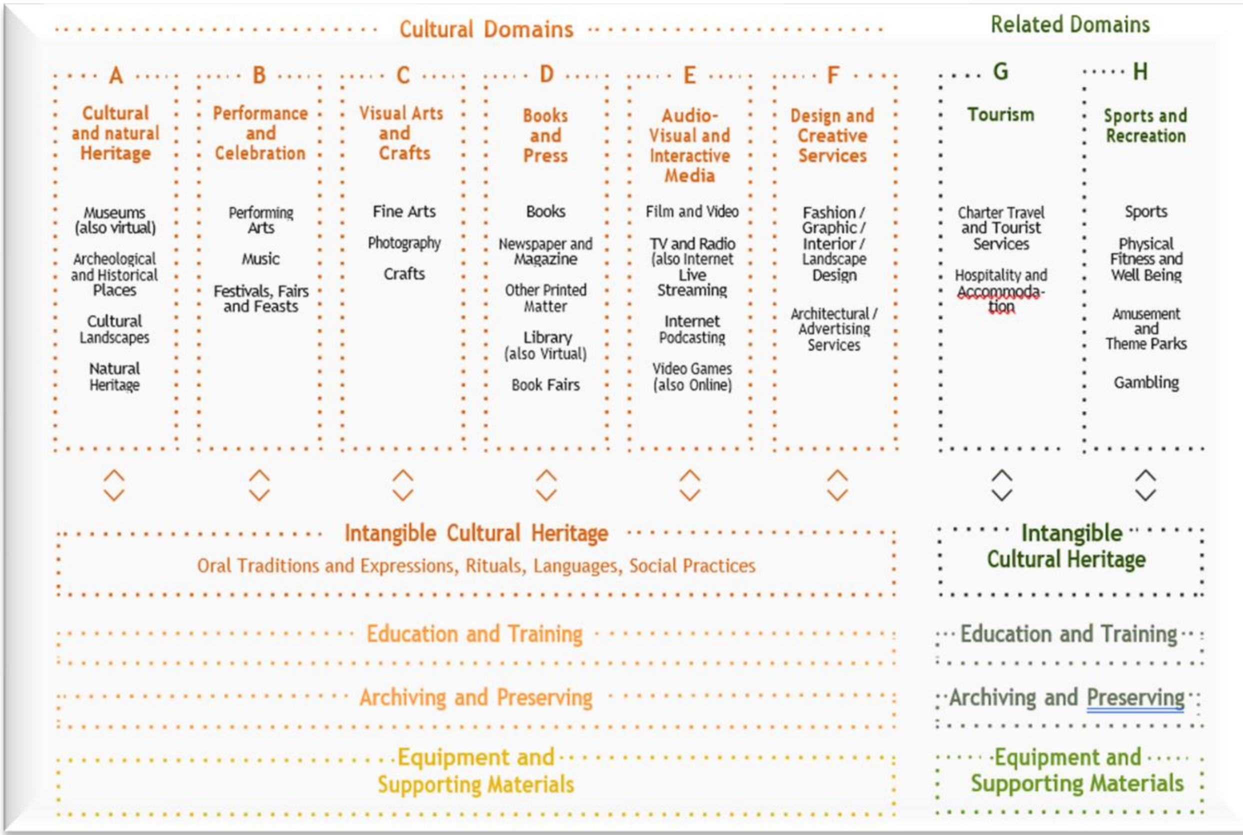
Source: BMWK 2020

CCI definition by domain

Another approach to defining the CCI involves grouping specific cultural and creative sub-markets or activities into domains that share similar economic and social characteristics. For example, UNESCO classifies the CCI into six primary cultural domains, encompassing a wide array of cultural activities, goods, and services that play a role in all phases of what they term the "cultural cycle model." In addition to these core domains, UNESCO also recognizes related domains, such as Tourism and Sports & Recreation, which are linked to the broader definition of culture and encompass various social and leisure activities. It is for that reason we consider Sports & Recreation in this report. Finally, UNESCO incorporates three transversal domains, acknowledging their critical role in the cultural cycle through the production and transmission of culture. Crucially, UNESCO also emphasizes the significant influence and interaction of intangible cultural heritage – encompassing values, rituals, oral expressions, and social practices – on all of the other defined domains.[7]

[7] UNESCO (2009): UNESCO Framework for Cultural Statistics.

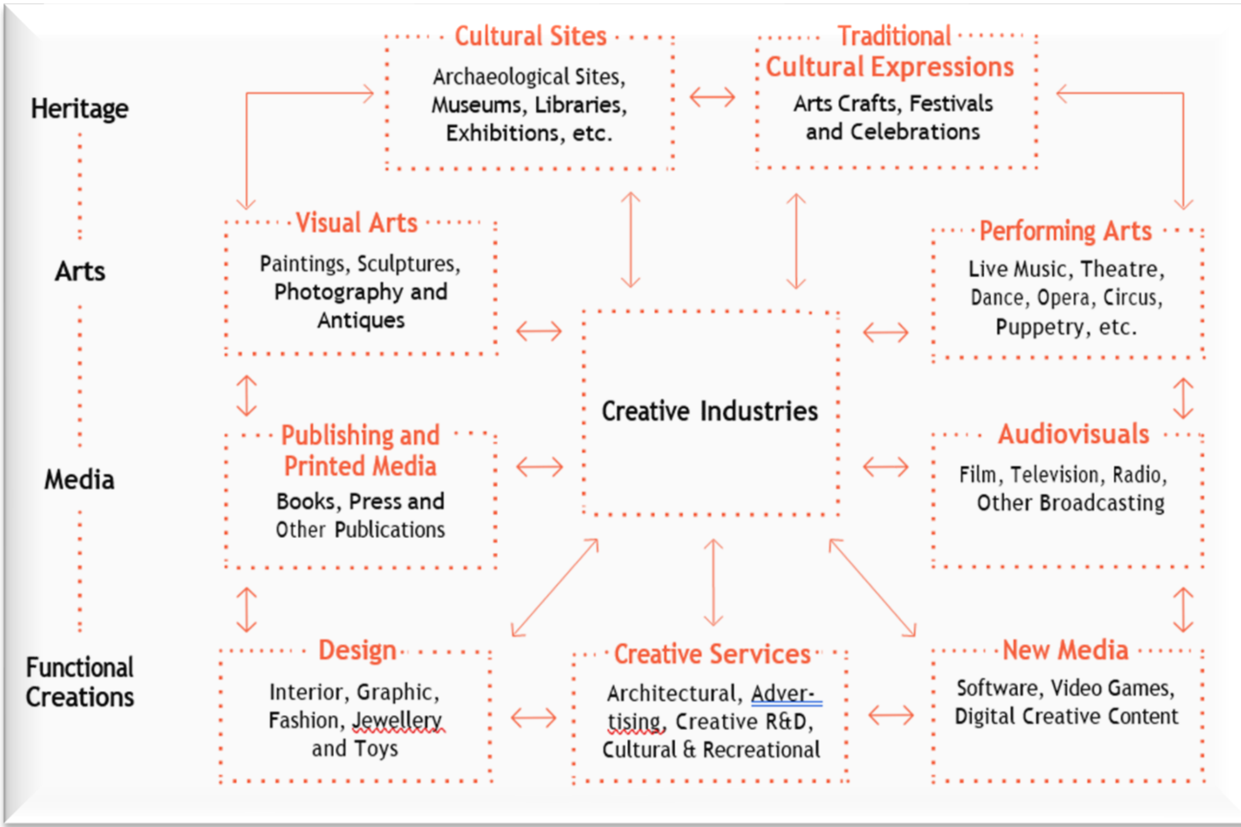
Figure 4: Domains of the CCI&S



Source: UNESCO 2009

While sharing similarities with UNESCO's classification, the UNCTAD (2004) definition of the Cultural and Creative Industries (CCI) differs in its specific grouping of sub-sectors into domains. UNCTAD employs a more granular approach, clustering cultural and creative sub-sectors into smaller groups, which are then categorized under four main domains: 1. Heritage, 2. Arts, 3. Media, and 4. Functional Creations. This approach allows for a more detailed analysis of the specific economic and trade-related aspects of the CCI (See figure 4 for more). The industries have support sectors that are instrumental in their functioning. These include education and training, archiving and preserving, and equipment and supporting materials. Education and training are related to specialized education that focuses on the cultural and creative industries. The education sector is central in bridging the inequality gap by equipping creatives with relevant skills, increasing their employability in local and global markets.

Figure 5: UNCTAD Creative Industries Model



Source: UNCTAD 2004

These domains are strategically arranged along a spectrum that ranges from upstream activities, typically encompassing more traditional and less commercially driven sectors such as cultural heritage and the performing and visual arts (often categorized as belonging to the cultural industries), to downstream activities, which encompass more modern, technology-intensive, and market-oriented sectors such as digital services and design (more commonly classified as the creative industries). This spectrum-based model encourages a holistic understanding of the CCI, highlighting the interconnectedness and interdependencies of the diverse domains within the sector. It recognizes that the strength of the CCI lies not only in its individual components but also in the synergistic relationships between these different areas of creative and cultural activity.

CCI, according to Concentric Circles Models

Another method for structuring the Cultural and Creative Industries (CCI) and their various sub-sectors involves the use of "Concentric Circles Models." These models are predicated on the idea of a central core, typically comprising "classic" artistic and largely non-industrial activities, surrounded by related economic sectors that form concentric layers, much like the layers of an onion. These surrounding layers generally consist of creative industries and supporting economic activities. As one moves further away from the core, the reliance on artistic and cultural inputs tends to decrease, while the connections to the broader, non-creative economy become more pronounced. This model suggests that the growth and vitality of the core creative industries can generate broader positive economic impacts that ripple outwards throughout the surrounding creative economy. However, it is important to note that the specific structure of these concentric circles – including the number and function of the layers, as well as which sub-sectors they contain – can vary significantly from model to model.

One of the earliest and most widely recognized models is that developed by Australian cultural economist David Throsby. Throsby argues that all CCI sectors possess both cultural and economic value, but their relationship to these two values differs depending on their position within the concentric circles, ranging from the "core cultural expressions" at the center to the "related industries" on the periphery.

Figure 6: David Throsby Model

Source: David Throsby 2008

Sports Definition

UNESCO recognizes Sports and Recreation as a related industry to the CCI's. The Sports industries are also important not just for employment creations, but also for the wellbeing of the society through social cohesion (Johnson, 2024; UNESCO, 2023; Silva, 2020). Sports consists of a wide value chain with various activities and enterprises that have different levels of participation. These include and are not limited to grassroots participation, talent management, merchandising, commercial services, and sports tourism. Digitization has also expanded the participation and included among others the sports online entertainment, enabling sportsman to play games and compete online. Like the CCI, sports industries contribute to the countries development through GDP, employment, export earnings, and sports tourism (Chen et al., 2022).

2. Cultural Occupation

The UNESCO (2009) Framework points out that cultural workers may be found in cultural industries, but also in other industries doing cultural work. A useful model for demonstrating this effect is the "Cultural Trident" (Higgs and Cunningham, 2008) which distinguishes between:

A. Cultural occupations in the cultural industries (such as a director in a film company);

B. Cultural occupations in non-cultural industries (such as a designer in a motorcar manufacturing firm); and

C. Non-cultural occupations in cultural industries, also called support occupations (such as an accountant in a theatre company).

This definition gives rise to three different ways of expressing employment in the cultural sector:

The *Creative Economy*, which includes those employed in creative occupations inside and outside the creative sector, as well as those in non-cultural jobs in creative sector firms (A + B + C);

Creative Industries, which is a sub-set of the creative economy, focusing on cultural and non-cultural workers, but only those employed in CCIs (A + C); and

Creative Occupations, which is a sub-set of the creative economy that focuses on cultural work both in, and outside of, cultural firms (A + B).

Using the UNESCO definitions of cultural occupations and cultural industries, this study identifies all three of these groups, as in previous mapping study reports.

The data can also be used to report on how the cultural sector contributes to the Sustainable Development Goals via the UNESCO "Thematic Indicators for Culture in the 2030 Agenda" (UNESCO, 2019). Thematic indicators are divided in four sub-categories: *Environment and Resilience, Prosperity and Livelihoods, Knowledge and Skills* and *Inclusion and Participation*. 'Cultural Employment' fits into the *Prosperity and Livelihoods* sub-category, which feeds into SDGs 8 (Decent Work and Economic Growth), 10 (Reduced Inequalities), and 11 (Sustainable Cities and Communities).

Figure 7: UNESCO Thematic Indicators for Culture 2030

Source: UNESCO, 2019

The cultural employment indicator is defined as “the number of people employed in the cultural and creative sectors and cultural occupations as a percentage of overall employment” (UNESCO, 2019:54). It is measured as:

$$CEP_0 = \frac{\sum_N^1 CE_{isco\ codes}}{EP}$$

Where:

- CEP_0 is the percentage of people engaged in cultural occupations;
- $CE_{isco\ codes}$ is the total number of people employed in cultural occupations according to the selected International Standard Classification of Occupations (ISCO) codes; and
- EP is the total number of the employed population.

Cultural Employment” is understood as including all three parts of the Cultural Trident measure. The purpose of the indicator is described as follows:

- This indicator aims to assess the role of culture as an ‘employer’ at the national and local level as well as the vitality and dynamism of the cultural sector and its potential in improving the material welfare of those employed in it” (UNESCO, 2019, p. 54).

2. Employment in South Africa's Cultural, Creative and Sports Industries

This section focuses on the cultural and creative work, encompassing both traditional arts and culture professions alongside sports-related occupations. The inclusion of sports reflects the increasingly recognized creative and economic dimensions of athletic endeavors, from performance artistry to the design and marketing of sporting goods. To accurately represent this expanded scope, which acknowledges the convergence of culture, creativity, and sports, we use the abbreviation CCI&S throughout this discussion. This broader definition allows for a more comprehensive analysis of the sector's economic impact and its contribution to society.

2.1. National Employment in the Cultural, Creative and Sports Industries

The CCI&S are a vital source of employment in South Africa, contributing significantly to the nation's overall job market. Defining CCI&S employment through the lens of the cultural Trident reveals three key components: the broad creative economy (encompassing creative professionals both within and outside the creative sector, as well as non-cultural roles in creative firms), the creative industries themselves (comprising all CCI&S employees, both cultural and non-cultural), and creative occupations (individuals engaged in cultural work both within and outside cultural firms). In 2024, South Africa's total CCI&S employment represented 7.2% of all jobs, translating to 1.05 million positions (Stats SA 2023). While substantial, this figure lags behind the global average of 8.2% employment within the broader creative economy, indicating potential for further growth and development within South Africa's CCI&S.

2.2. Annual Cultural, Creative and Sports Industries Occupations

Figure 8 illustrates the employment trends within South Africa's CCI&S from 2021 to 2024, highlighting a period of fluctuating but ultimately positive growth. Between the years under consideration, the sector experienced a slight decline from 1 053 547 jobs in 2021 to 1 039 414 jobs in 2022, suggesting employment shifts among different industries. The industries a showed a strong recovery in 2023, with an impressive surge of 1 165 709 jobs in CCI&S employment. The most striking growth occurred between 2023 and 2024, as the sector witnessed a substantial 23% expansion, indicating a period of robust job creation and suggesting a strengthening role for the CCI&S within the national economy. Overall, the CCI&S employment grew by 35% over 2021 to 2024. This is in line with global expectations for the industries. For example, PwC (2022) estimates the African entertainment sectors to grow by 15% annually. Against this background, South African industries and can benefit from support programs to reach its potential.

Figure 8: Employment Trends between 2021 and 2024

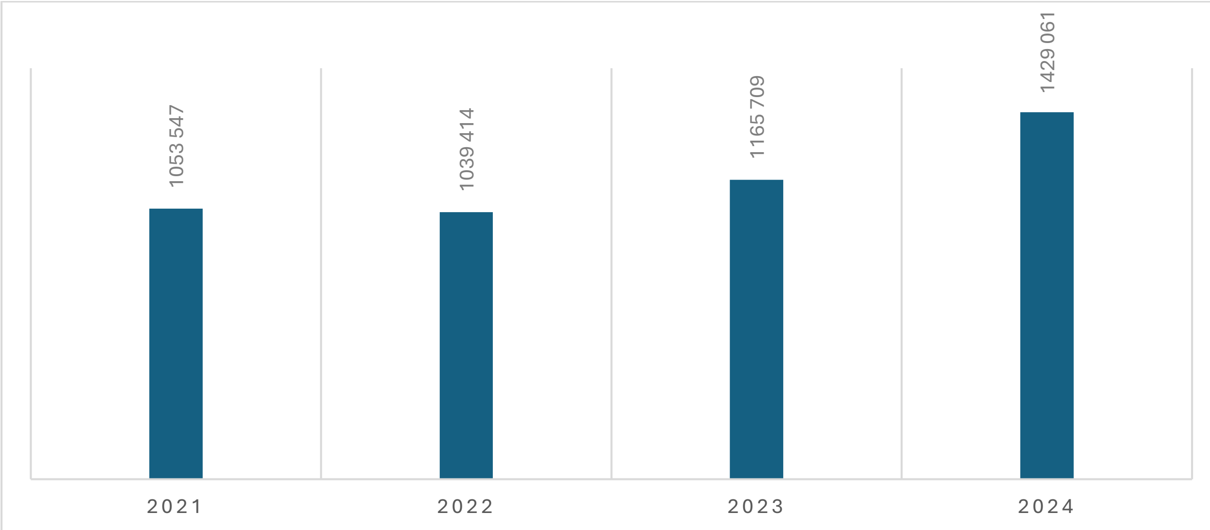
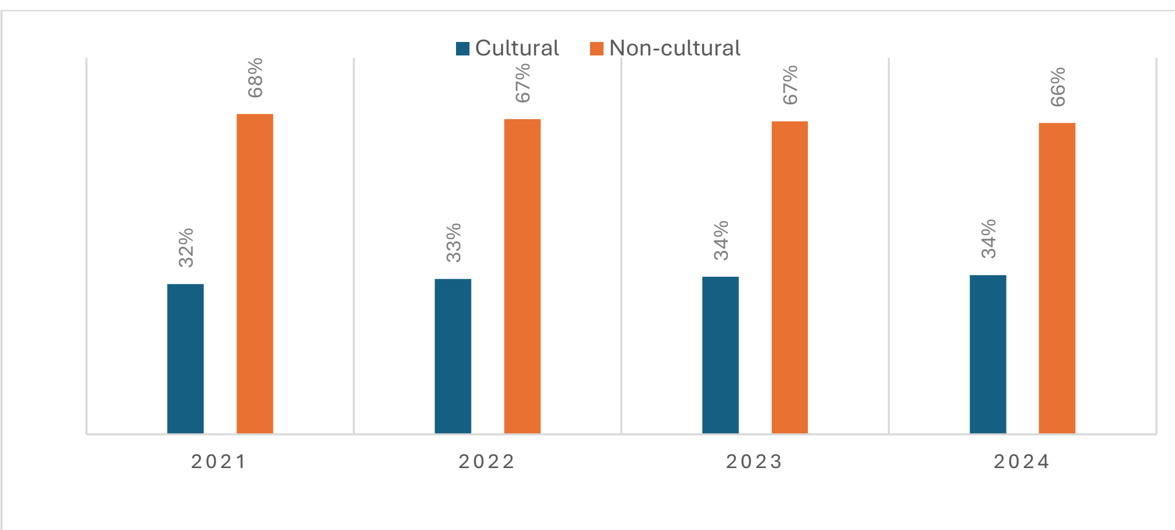


Figure 9 breaks down cultural and non-cultural employment. Over the years the CCI&S have maintained its share of 32 to 34%, while non-cultural employment accounted for 66 to 67%. The figures show that the decline in employment from the previous Figure 8 was not from direct cultural occupations. It was from non-cultural occupation, that declined from 68% to 67%. The cultural employment shows resilience with minimal fluctuations. The distribution suggests that the industries have reached a mature employment stage where structural changes cause minimal impacts. Moreover, the industries generate more jobs for the supporting industries like marketing and business services. The 2:1 ratio through the multiplier effect displays the industries as a growth engine.

Figure 9: Cultural and Non-Cultural Employment

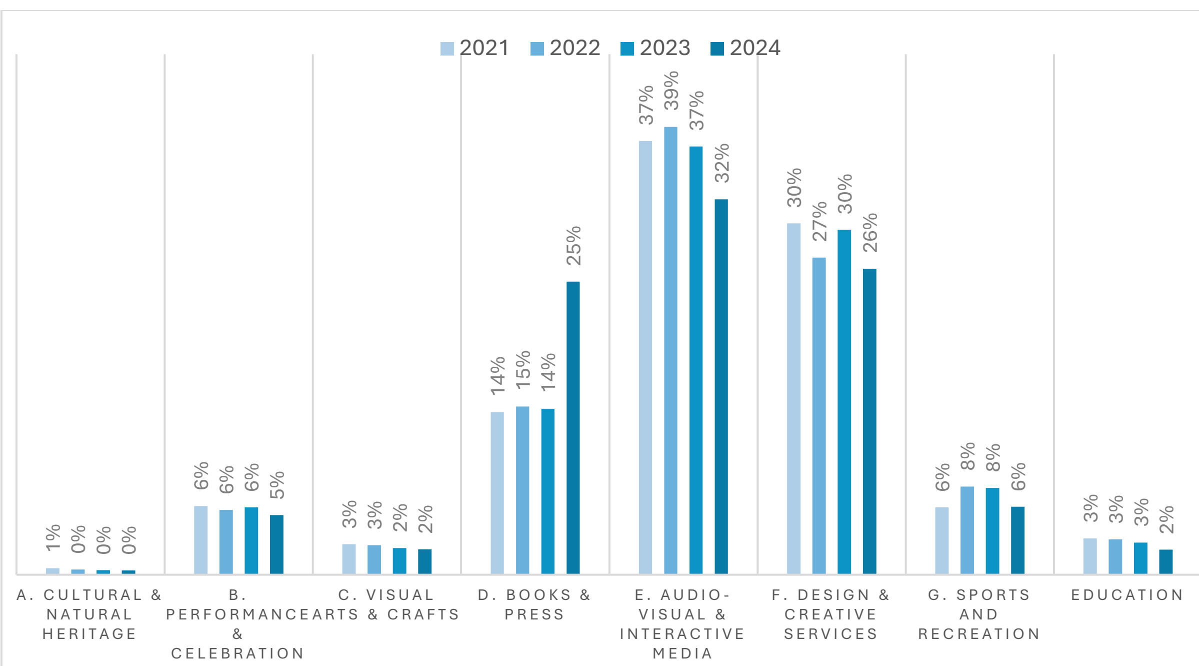


2.3. Employment in Cultural, Creative and Sports Industries Occupations by Domain

Figure 10 breaks down employment in South Africa's CCI&S industries by domains, revealing a varied landscape of job creation across the industries. The data highlights opportunities and risks of the occupation. From 2021 to 2024, jobs remained centered around the Audio Visual & Interactive Media, Design & Creative Services, and Book & Press domains. This aligns with global trends as reported by UNCTAD (2024), underscoring digital transformation as the driver among the domains. This trend suggests growth and demand of activities in the domains. Policymakers need to draw special attention to these domains, since they are displayed as a growth catalyst.

Conversely, domains such as Cultural & Natural Heritage and Visual Arts & Crafts account for less occupations, with a declining growth over the years 2021 to 2024. On the other hand, the Performance and Celebrations and Sports and Recreation domains also account for a smaller share of employment (about 6% respectively), albeit double that of the Cultural & Natural Heritage and Visual Arts & Crafts (less than 3% respectively). The disparity among the domains that contribute less to employment highlight a critical need to understand the factors that limit job creation, and to develop targeted strategies to stimulate growth and employment opportunities across the full spectrum of South Africa's CCI&S. For instance, in the Visual Arts & Crafts domain, there is an element of digitization (e.g. 3D printing and virtual exhibitions) that policy makers can invest in, given the ongoing transformation in the digital space. The same applies to the Sports and Recreation domains, where e-sports is gaining momentum. On a positive note, books and press display resilience mainly because of the educational publishing contracts (Publishers Association of South Africa, 2023).

Figure 10: Employment trends by domain from 2021 to 2024



2.4. Employment in Cultural and Sports Occupations by Gender

The gender dimension in the CCI&S reveals commonly known vulnerabilities and opportunities. Figure 11 below largely confirms existing patterns, with men consistently outnumbering women in the overall workforce since 2021. In 2022, there was even a further decline of women engaged in the CCI&S industries. However, an improvement is seen in 2023 (517 739), which was even stronger in 2024 (678 366). The gender imbalance is a missed opportunity that continues to linger globally. According to the World Economic Forum (2025) report on the global gender gap, South Africa performed better than its peers in education parity, but weaker in economic participation. Even though women participate in the CCI&S industries, they do not get to fully benefit from the value generated.

Against this background there is a need for targeted initiatives that specifically aim to promote women's equitable participation and economic empowerment within South Africa's creative and sports industries. A more granular approach that scrutinizes the domains individually may assist with the targeted interventions for maximum impact.

Figure 11: Employment in the CCI&S Industries by Gender from 2021 to 2024

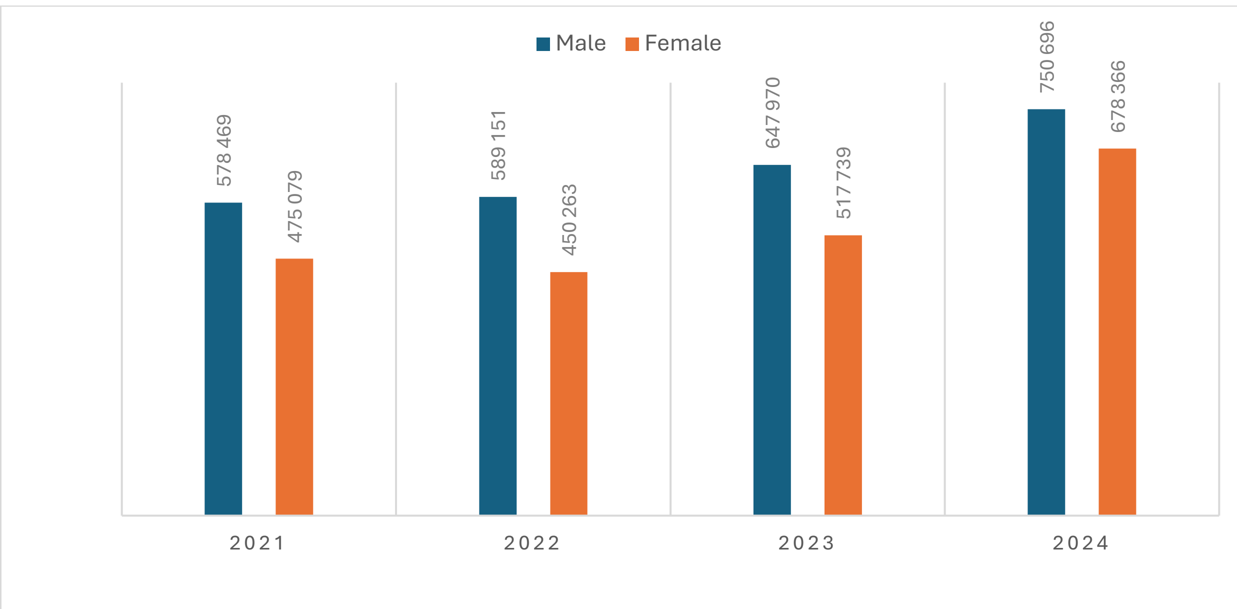
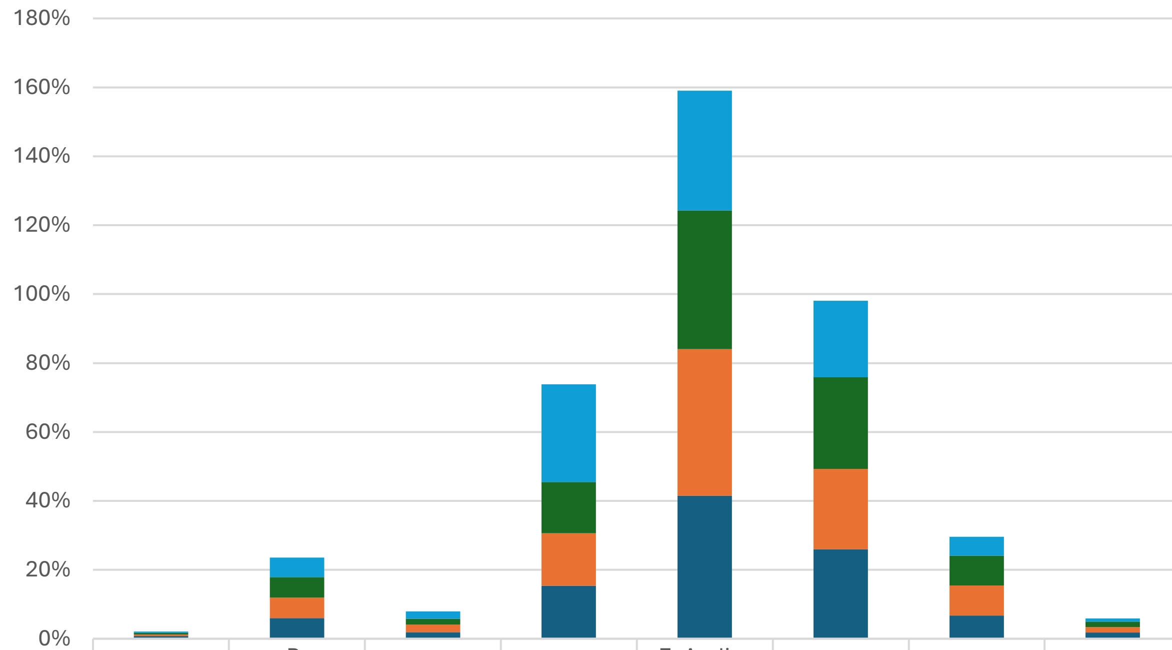


Figure 12 and 13 further highlights percentage of employment opportunities in various domains for men and women across the sector from 2021 to 2024. The granular analysis by domain reveals a noteworthy exception: the Audio-visual and Interactive Media sector, which stands out as the only domain consistently employing more women than men across 2021 to 2024. This suggests a potential shift in traditional gender roles within this specific area, particularly considering previous research highlighting women's underrepresentation in this field. However, increased female representation does not automatically translate to equitable economic outcomes. As Bob and Munien (2022) observed, positions predominantly held by women in the sector, such as costume designers and makeup artists, are often characterized by lower pay and limited decision-making authority.

There is an underrepresentation of women in roles that pay high salaries like directors. According to GIZ (2023), female directors in the film industry account for a mere 15%. A similar trend is observed globally, in the EU, about 60% of women have educational qualifications centered around the creative industries, however, only 34% of them hold leadership positions (European Institute for Gender Equality, 2023). This underscores the importance of interventions that go beyond simply increasing the number of women employed to address issues of equity, ensuring fair compensation, and promoting access to leadership roles within the creative economy.

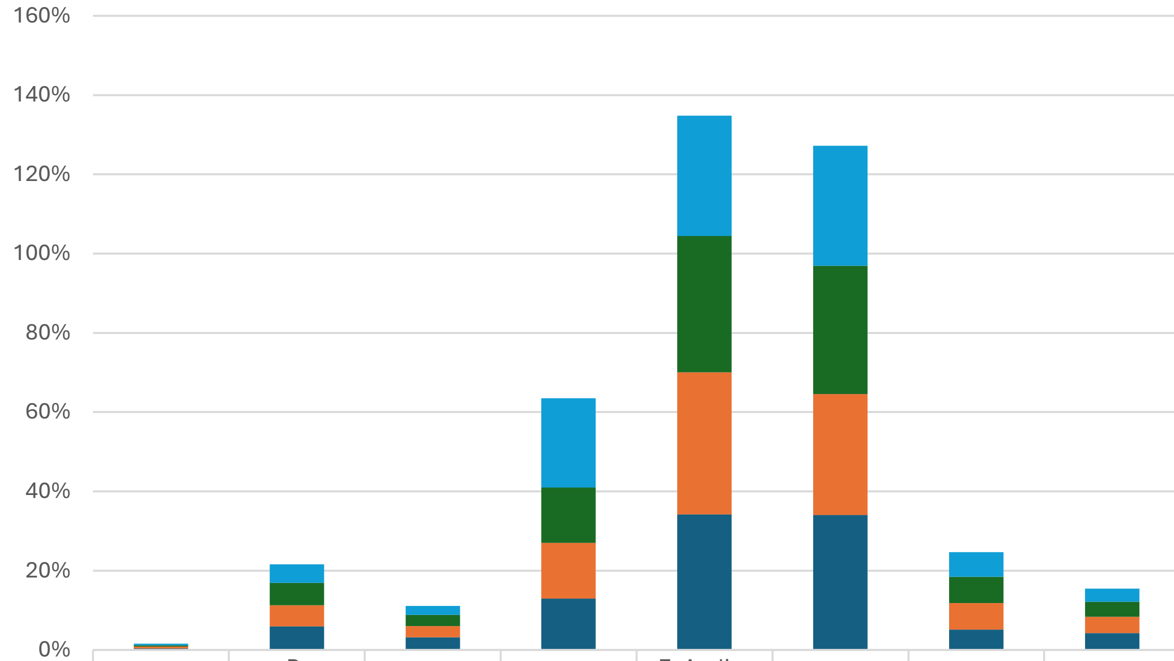
Figure 12: Employment in CCI&S Domains by Gender - Females



	A. Cultural & Natural Heritage	B. Performance & Celebration	C. Visual Arts & Crafts	D. Books & Press	E. Audio-Visual & Interactive Media	F. Design & Creative Services	G. Sports and Recreation	Education
2024	0%	6%	2%	28%	35%	22%	5%	1%
2023	0%	6%	2%	15%	40%	27%	9%	2%
2022	1%	6%	2%	15%	43%	23%	9%	2%
2021	1%	6%	2%	15%	42%	26%	7%	2%

In comparison with males, Figure 13 displays males well represented in the Design and Creative Services, followed by the Audio-visual and Interactive Media domain, where men occupy senior positions with premium salaries. Overall, consistent with previous reports, the inequality of women in cultural occupations compared to men remains a concerning trend. Addressing this trend by advocating for parity between males and females may increase productivity as stated in the Power of Parity report (McKinsey, 2022).

Figure 13: Employment in CCI&S Domains by Gender - Males



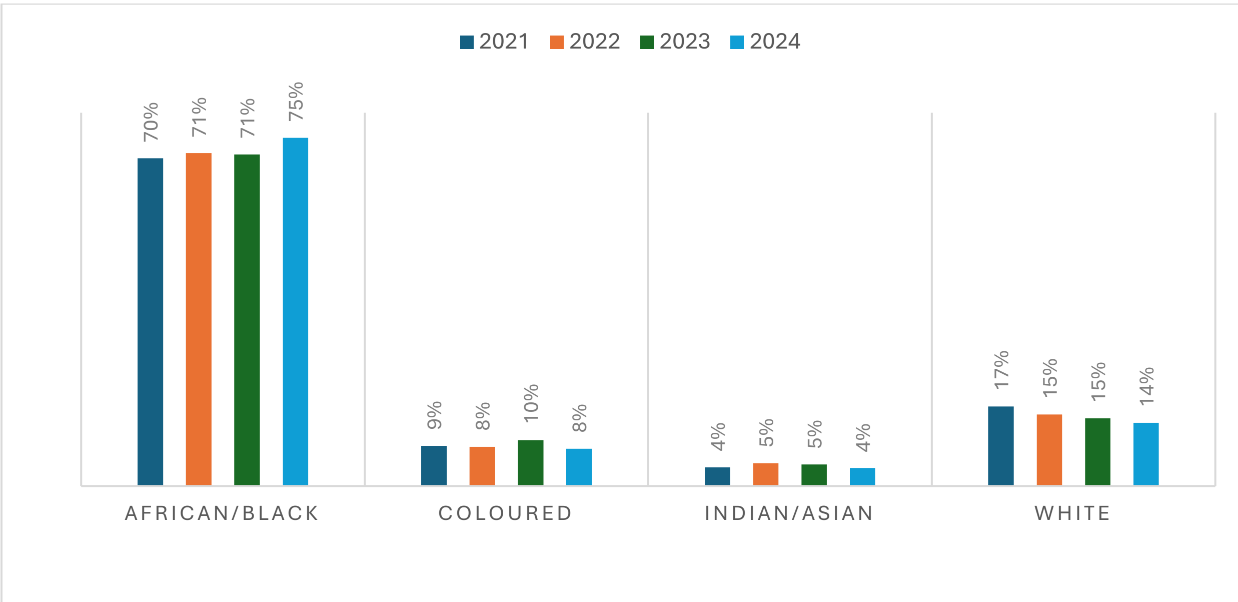
	A. Cultural & Natural Heritage	B. Performance & Celebration	C. Visual Arts & Crafts	D. Books & Press	E. Audio-Visual & Interactive Media	F. Design & Creative Services	G. Sports and Recreation	Education
2024	0%	5%	2%	23%	30%	30%	6%	3%
2023	0%	6%	3%	14%	34%	32%	7%	4%
2022	0%	5%	3%	14%	36%	31%	7%	4%
2021	0%	6%	3%	13%	34%	34%	5%	4%

2.5. Employment in Cultural and Sports Occupations by Race

While not yet fully reflecting the diverse demographics of the South African population, data from Figure 14 suggests progress towards greater racial representation within cultural and sports occupations. According to Statistics South Africa's 2024 findings, African/Black individuals comprise the majority of those employed in cultural occupations, accounting for 75% of the workforce. White individuals represent 14%, Colored individuals constitute 8%, and Indian/Asian individuals make up 4% of workers within these occupations. Notably, the representation of Indian/Asian individuals, although less than 10% of the South African population, highlights a potentially disproportionate presence within the cultural occupations workforce, suggesting specific areas or sub-sectors where this community may be more heavily represented. Continued monitoring and targeted initiatives are essential to ensure that the cultural and sports sectors fully reflect the nation's diverse population and provide equitable opportunities for all.

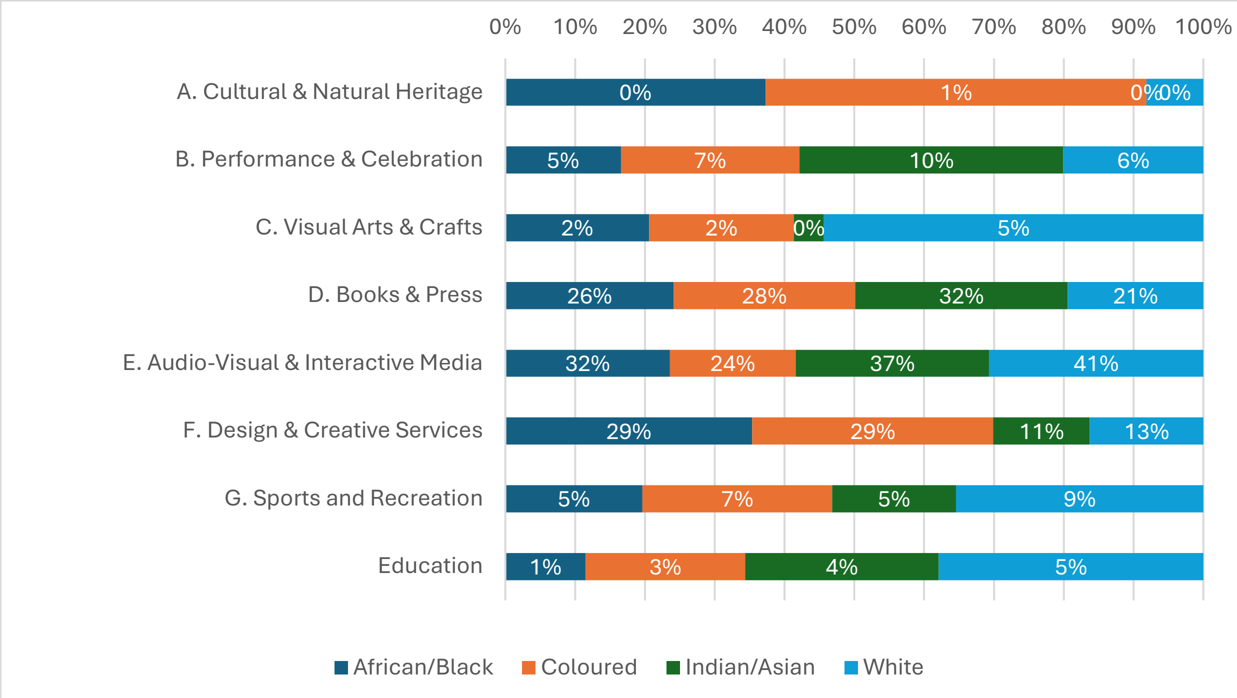
Figure 14 depicts employment numbers from 2021 to 2024, broken down by four racial groups: African/Black, Coloured, Indian/Asian, and White. This visual representation provides a clear overview of the racial composition of the workforce within the South African cultural and sports industries over the specified period. A key observation from the graph is the significantly higher employment numbers for African/Black individuals compared to other racial groups. The figure also showcases employment figures for Coloured, Indian/Asian, and White individuals, allowing for a comparison of their representation within the cultural and sports sectors. The figure provides valuable insights into employment equity and racial diversity within South Africa's cultural and sports industries.

Figure 14: Employment in the CCI&S Industries by Race from 2021 to 2024



The results presented in Figure 15 display the CCI&S occupations in 2024 by domain. The data reveals disparities of races in the domains. Different racial groups have varying contributions in the CCI&S. Whites dominate in the industry that generates the most income (Audio-Visual & Interactive Media at 41%). Blacks have an equal share with Coloured in Design & Creative Services (29% respectively). Coloured also dominate in Books and Press (32%), while Indians dominate in Performance and Celebration (10%). When looking at education, the support sector of the creative industries, whites occupy a large percentage (5%) of the sector compared to other races, like blacks (1%). The education sector is important in bridging the skills gap, making creatives competitive. The sector also needs to be transformed to ensure equity. The data shows disparities that validate that the industries are not transformed especially in the most important sectors, indicating the need for targeted policies to accelerate transformation. The distribution in the industries need to display South Africa's diverse populations.

Figure 15: Employment in the CCI&S Industries Domains by Race 2024



2.6. Employment in Cultural, Creative and Sports Industries Occupations by Education level

Figure 16 tracks employment trends for individuals with no schooling, less than primary completed, primary completed, secondary not completed, secondary completed, tertiary education, and an "other" category. The data visually represents the relationship between education level and employment, showcasing which educational categories have the highest and lowest employment rates over the four-year period. A general observation from the graph reveals a clear positive correlation between education level and employment. Individuals that have not completed secondary education and those that completed secondary education demonstrate the highest employment numbers, significantly outperforming those with lower levels of education or no schooling. The graph also highlights trends over time, indicating whether employment within each educational category is increasing, decreasing, or remaining relatively stable between 2021 and 2024. This visual representation provides a valuable overview of the employment landscape concerning education levels, offering insights for policymakers and researchers interested in addressing employment disparities and promoting educational attainment.

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 labour 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: Employment Trends in the CCI&S Industries by Education Level.

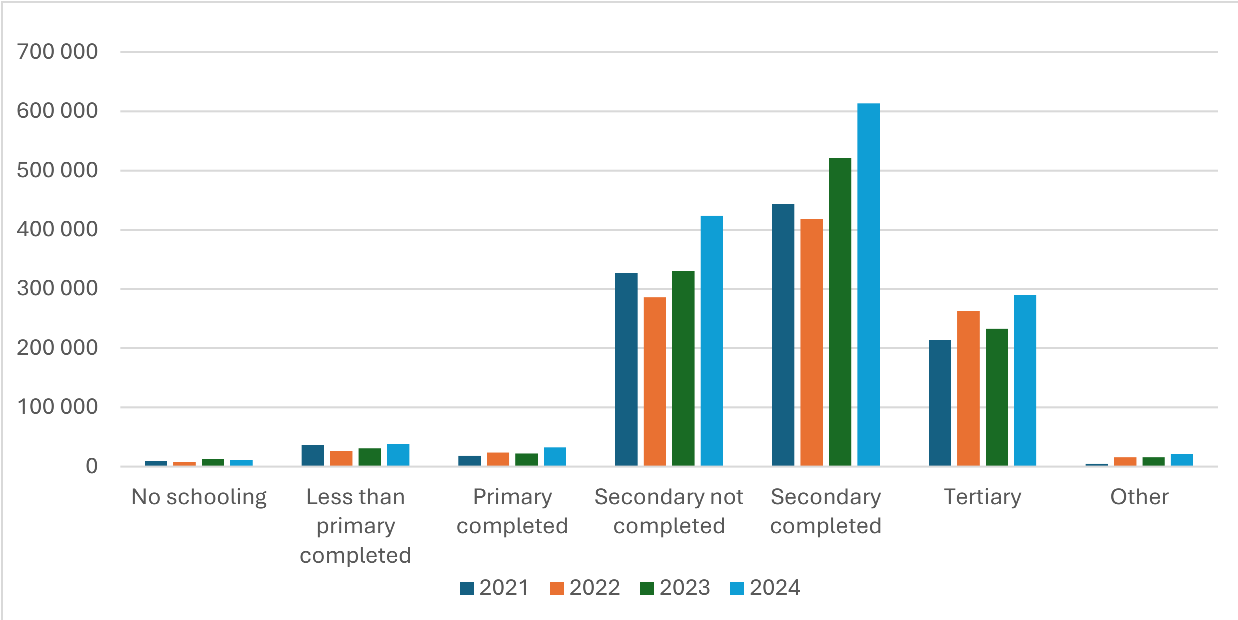
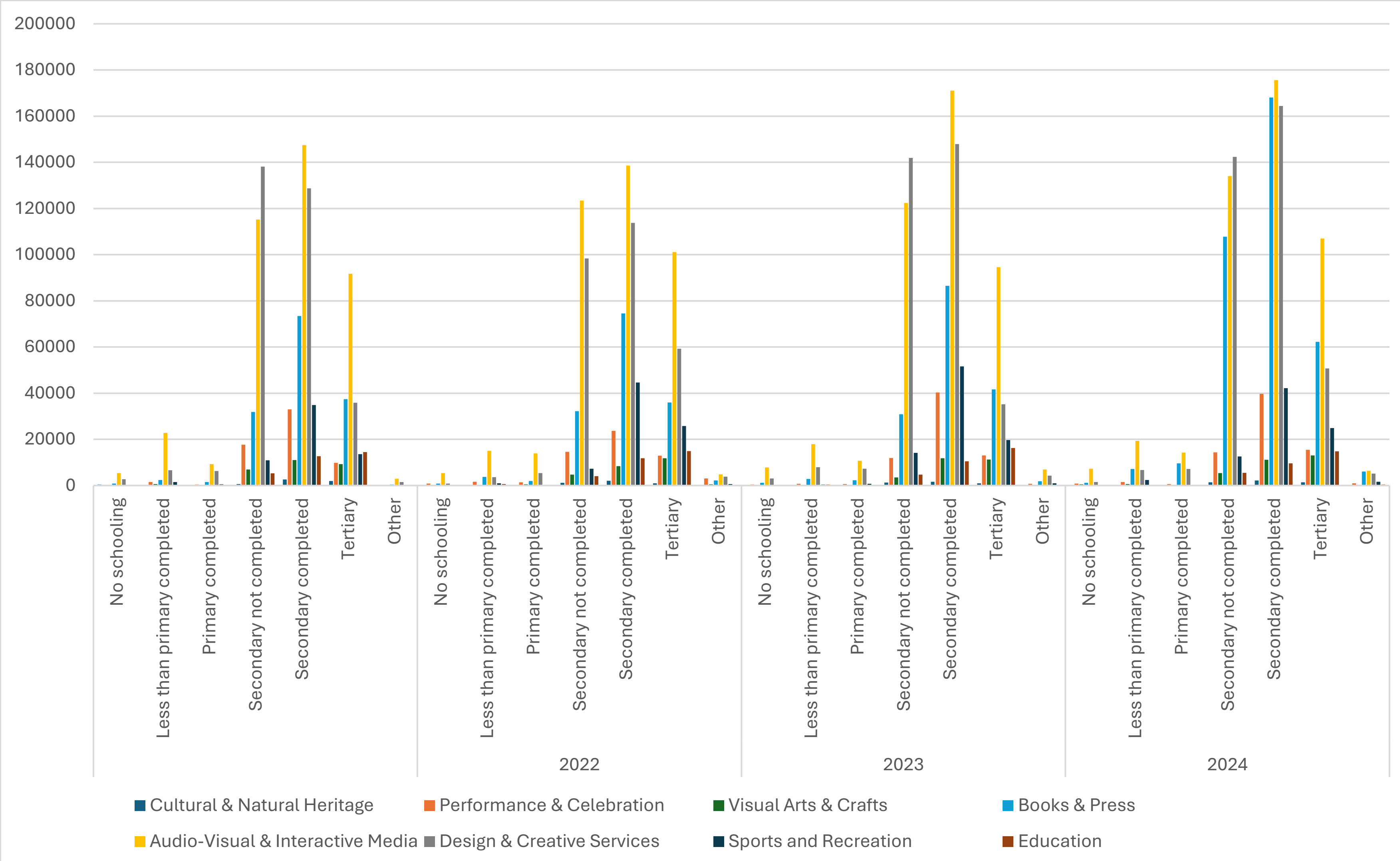


Figure 17 displays employment trends across various educational levels and cultural sectors between 2021 and 2024. The graph categorizes the workforce by their highest level of educational attainment, including "No schooling," "Less than primary completed," "Primary completed," "Secondary not completed," "Secondary completed," "Tertiary," and "Other." These educational levels are then cross-referenced with employment within several key cultural sectors: "Cultural & Natural Heritage," "Performance & Celebration," "Visual Arts & Crafts," "Books & Press," "Audio-Visual & Interactive Media," "Design & Creative Services," "Sports and Recreation," and "Education."

From a high-level view, the figure shows that certain cultural sectors exhibit higher employment figures overall compared to others, with Audio-Visual & Interactive Media and Visual Arts & Crafts showing relatively high figures. Moreover, the graph suggests that those with a completed secondary education tend to have higher rates of employment across most cultural sectors. The 2024 data shows an increasing need for tertiary education, especially in the domain that generates the most income/GDP, the Audio-Visual & Interactive Media. Digitization requires skills, hence further studies may be beneficial. Tertiary education may also enable global competitiveness.

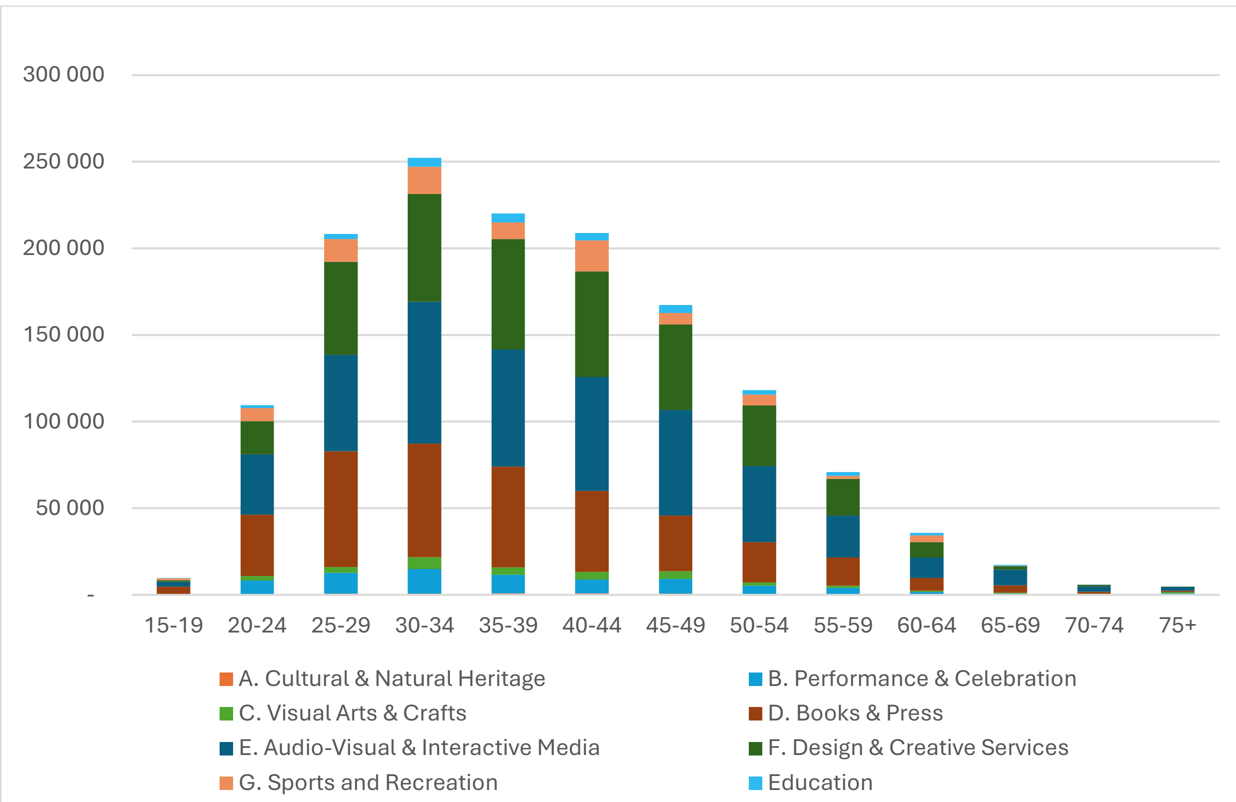
Figure 17: Employment Trends in the CCI&S by Education Level.



2.7. Employment in Cultural and Sports Occupations by Age

Figure 18 presents employment in the South African Cultural and Sports industries by Age, depicting employment distribution across various age groups within the sector from 2021 to 2024. The graph segments the workforce into age brackets, including 15-19, 20-24, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60-64, 65-69, 70-74, and 75+, providing a detailed overview of the age demographics within the South African creative and sports industries. A visual analysis of the graph suggests that the age groups 20-24, 25-29, and 30-34 likely represent the largest segments of the workforce within the depicted industries. The Figure provides a valuable snapshot of the age composition of the sector's workforce, with the largest sections seeming to be the early-career age ranges. 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).

Figure 18: Employment in the CCI&S Industries by Age in 2024



2.8. Quarterly Trends in the CCI&S Industries Employment

The following Figures 19, 20, 21, and 22 display employment quarterly trends for the years 2021 to 2024. There are modest seasonal variations across the industries for different years. The Audio-Visual & Interactive Media, Design & Creative Services, and Books & Press consistently account for the most employment over the years. Books & Press displayed a notable growth in 2024 across all the quarters, doubling employment from approximately 150 000 jobs to approximately 350 000 jobs. There are minimal variations among the other domains in most of the quarters. Overall, the quarterly employment in the CCI&S remained predictable and resilient post the COVID19 pandemic.

Figure 19: Quarterly Employment Trends in the CCI&S for 2021

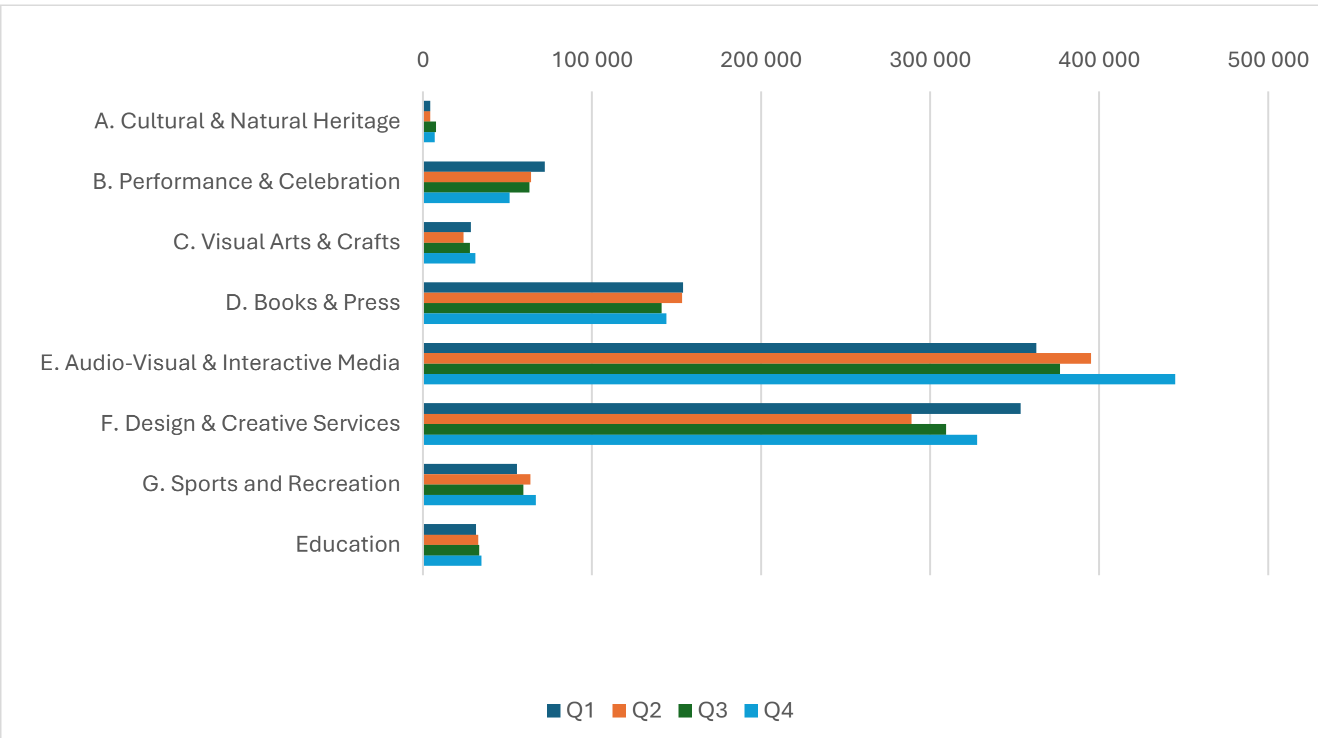


Figure 20: Quarterly Employment Trends in the CCI&S for 2022

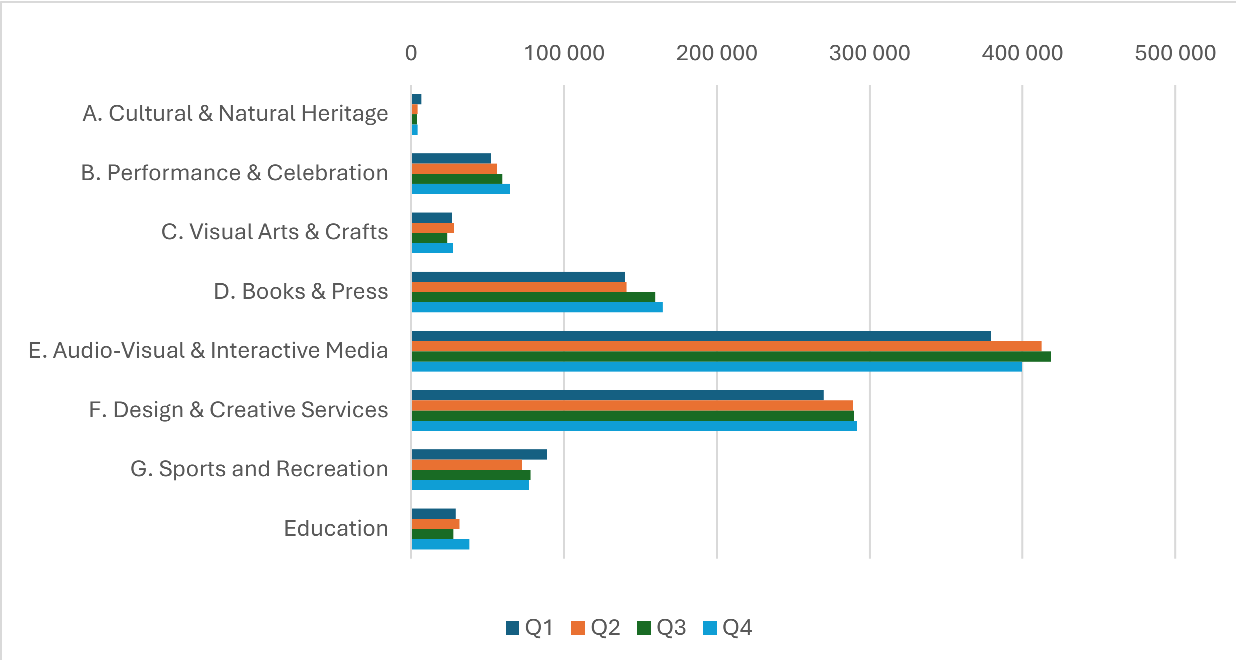


Figure 21: Quarterly Employment Trends in the CCI&S for 2023

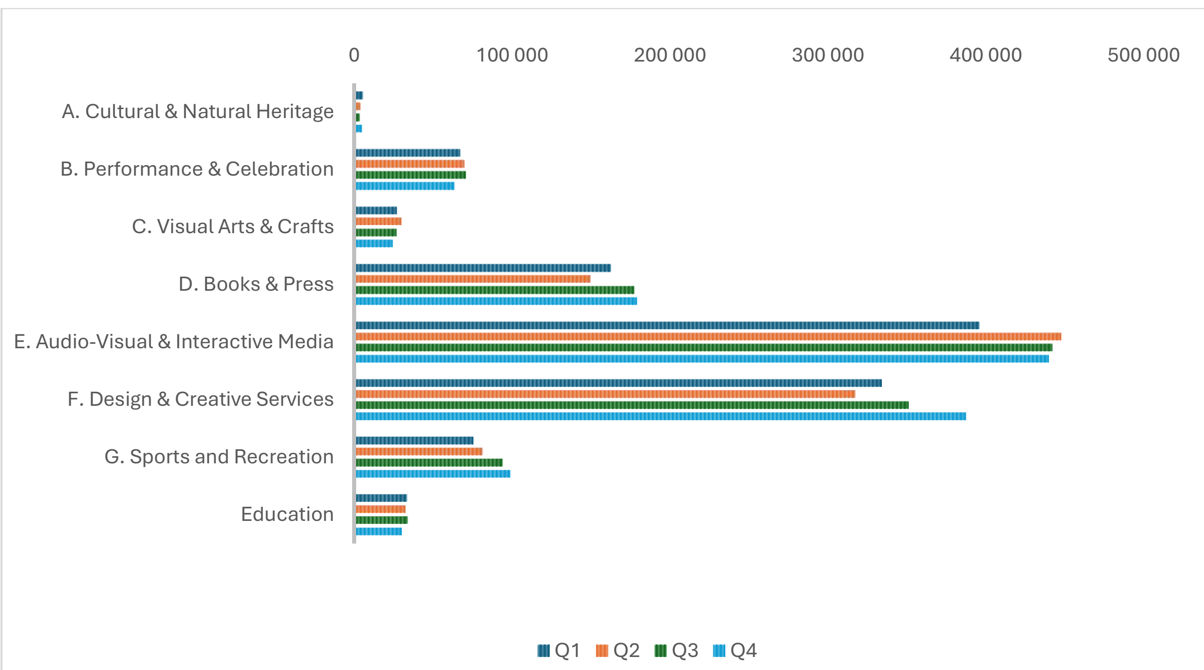
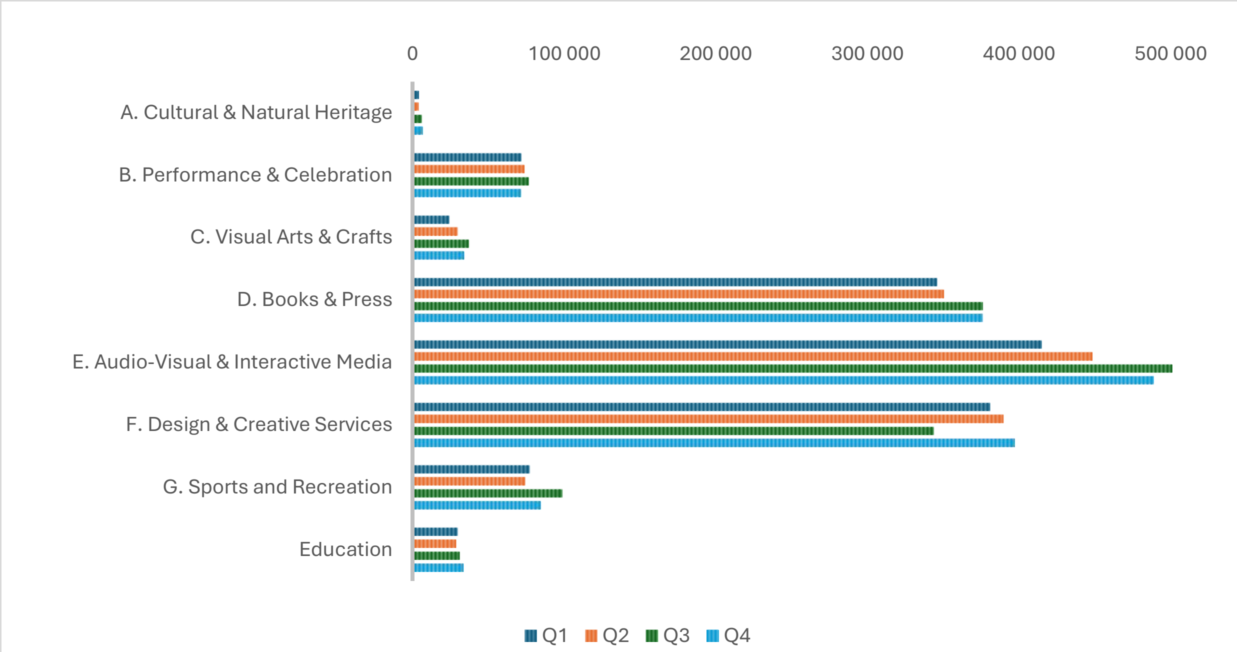


Figure 22: Quarterly Employment Trends in the CCI&S for 2024



3. Enterprise Ownership

Transformation is not only about employment, but it also includes ownership of the CCI&S industries. This section discusses the enterprise ownership trends within the industries. The CCI&S industries consist of mix formal and informal enterprises. Informal enterprises are often not counted in official statistics, not capturing the full picture. In Figure 23, the data display an impressive growth on enterprise ownership from 37 114 in 2015 to 95 631 in 2022. The CCI&S enterprises showed resilience even during the COVID19 pandemic, with a modest decline in 2020. The data indicates growth opportunities in the CCI&S industries given their significant growth in 2022. On average, the enterprises annual average growth reached 14.5%. Growth drivers may be attributed to AI or technology adoption, increased demand based on global reach and supporting policy frameworks.

Figure 23: Yearly Trends in Enterprise Ownership

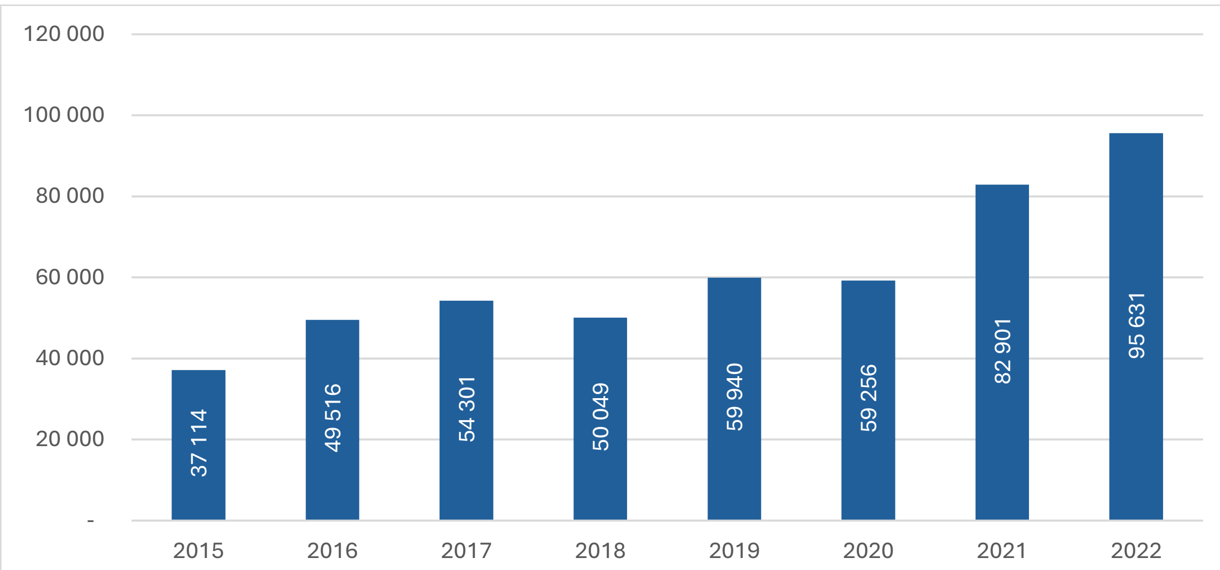
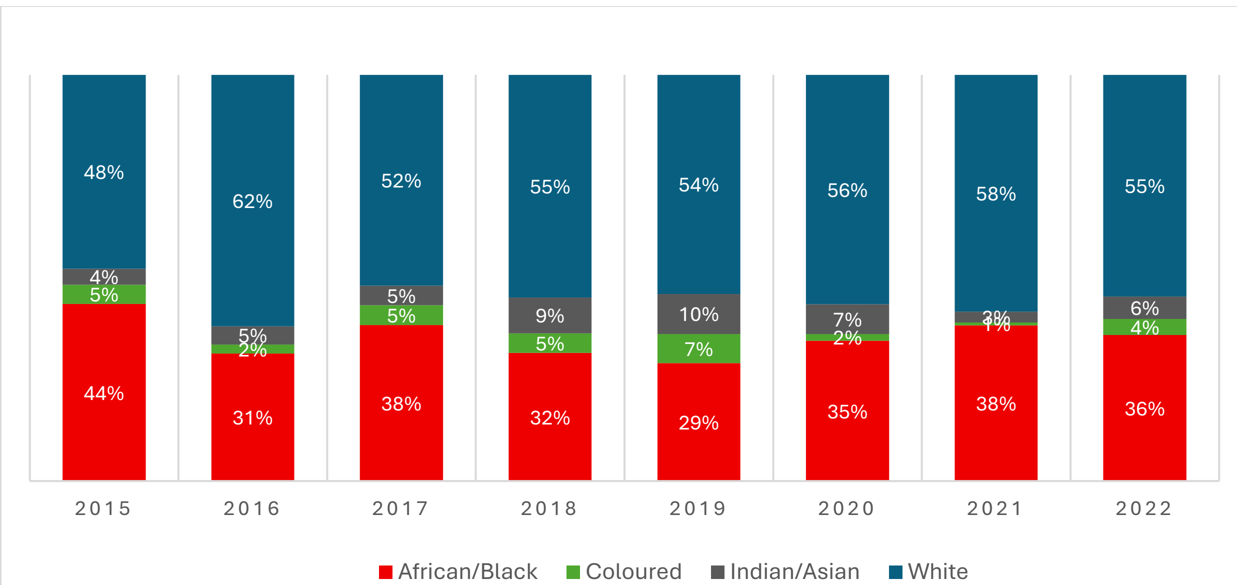


Figure 24 displays enterprise ownership by race. The figures display that majority of the enterprises in the CCI&S are owned by white South Africans. Whites have consistently owned enterprises over the period 2015 to 2022. Black ownership had been fluctuating over the years displaying a downward trajectory from 44% in 2015 to 36% in 2022. According to the Small Enterprise Development Agency report (SEDA, 2023), there is a multiplier effect in ownership concentration, with white enterprises employing more people (15 on average) than black owned enterprises (8 on average). The domains that generate the most income like the Audio-Visual Media requires substantial capital investment, which black people often do not have. Policymakers need to support black businesses with access to capital and mentorship, to close the existing gaps. Partnerships with major broadcasters can be established for resource sharing and skill transfer, uplifting the disadvantaged groups.

What is noteworthy is that enterprises ownership increased from 2020 to 2021 for both white (56% to 58%) and black (35% to 38%) owners. This indicates the enterprises where somewhat resilient despite the pandemic. Contrary to Coloured and Indian/Asian enterprise owners who experienced a decline from 2% to 1% and 7% to 3% respectively. These races were disproportionally affected by COVID19 impact without adequate support. Interestingly, the white and black owners experienced a decline of enterprise ownership, while Coloureds and Indians/Asians experienced and increase. Overall, there are equity gaps that need attention. Moreover, targeted incentives or support is necessary to improve Coloured and Indian/Asian ownership.

Figure 24: Enterprise Ownership by Race



4. Employment Trends by Provinces

The next section outlines the geographic distribution of CCI&S employment in South Africa. Figure 25 exhibits a pronounced concentration in the Gauteng Province, acting as the dominant hub of the CCI&S activities. Gauteng provides livelihoods for an average of 479 000 workers. The CCI&S employment is also concentrated in the Western Cape and Kwa-Zulu Natal. These province accounts for most employment due to the advance infrastructure they possess and structural concentration, especially Gauteng and Western Cape. There is stable broadband connectivity among other infrastructure, driving consumer spending (ICASA, 2024).

It is interesting to note that the top 3 provinces where the most CCI&S employment is based had fluctuating employment trends over the years under consideration, mainly the decline in 2022. On the contrary, most of the provinces with less employment seem to have experienced steady employment growth over the years 2021 to 2024. This may signal potential. Infrastructure investments may assist in creating jobs in the provinces, especially since digitization has made regions borderless. Creators may be able to reach customers in other provinces, or even global customers.

Figure 25: CCI&S Employment by Provinces from 2021 to 2024

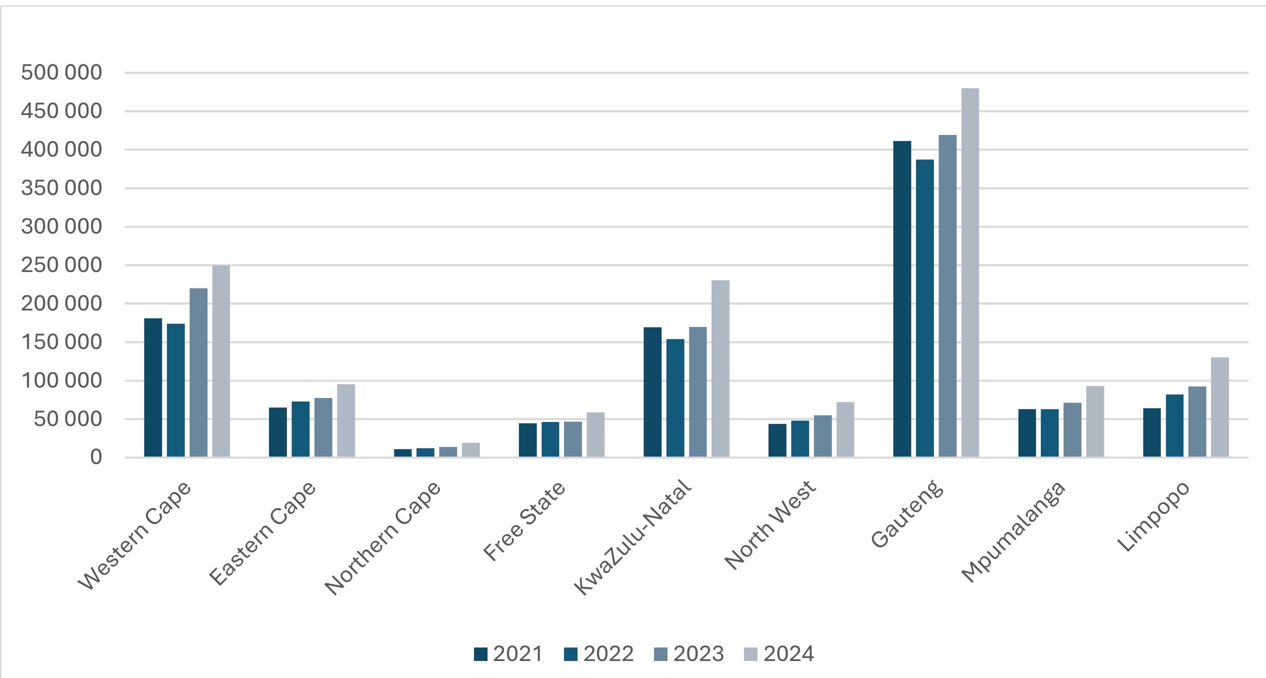
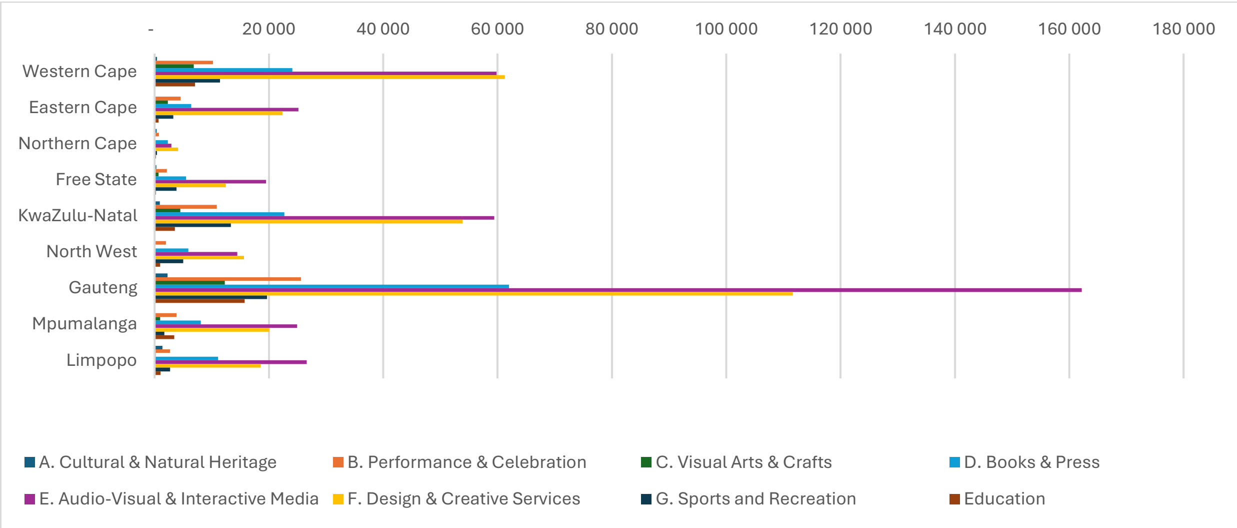


Figure 26 displays the CCI&S employment by domain within the provinces in 2021.The domain distribution is in line with the national trends, with Audio-Visual & Interactive Media accounting for the most employment. Major metropolitan hubs like Johannesburg, Cape Town, and Durban create employment in

Gauteng, the Western Cape, and Kwa-Zulu Natal. These trends display limiting transformation since disadvantaged provinces and rural areas are not able to participate in the CCI&S industries, given they are concentrated in the major economic hubs.

Figure 26: CCI&S Employment by Domain and Provinces in 2021



The Figures 27-34 below display trends of each province from 2021 to 2022. Like the annual trends, the employment in CCI&S domains across the 9 provinces display Audio-Visual & Interactive Media and Design & Creative Services as robust domains across multiple provinces, suggesting strong demand and growth potential in these areas. Conversely, domains like Cultural & Natural Heritage and Sports & Recreation tend to showcase more moderate or lower employment levels, indicating potential challenges or limited growth opportunities. The trends in the province suggest the industries are mostly driven by market forces. One would think provinces with rich cultural heritage like Kwa-Zulu Natal and Limpopo would thrive in domains like Cultural and Natural Heritage, however, this is not the case. It seems like creators go where the money is, i.e. economic hubs like Johannesburg and Cape Town. This may stem from infrastructure issues in their home provinces, or low economic activity that fails to drive consumer spending. Policymakers need to invest in infrastructure such as digital and logistical infrastructure so that creators can create from their home provinces, advertise their craft online, and get the products transported to the consumer. On the other hand, Performance and Celebrations suggests opportunities in Northwest, Free State and Limpopo. Even though small, the domain has an upward trend in the latter provinces, while other provinces are fluctuating downward. This suggests that in provinces rich in culture, cultural products can benefit from digitization and improved logistical processes, while investing in concert infrastructure can improve cultural performances output in the same provinces.

The observed variations in employment trends across provinces and domains underscore the complex and dynamic nature of the CCI&S. While certain domains demonstrate consistent growth, others experience fluctuations or stagnation, highlighting the need for tailored strategies to address the specific challenges and opportunities within each sub-sector. These graphs below serve multiple purposes, including illustrating the dynamic employment landscape within the CCI&S, identifying growth areas and domains that are driving job creation, pinpointing areas of concern where employment is lagging, and providing evidence-based insights to inform policy decisions and resource allocation.

To summarize the employment trends in the provinces, the top 3 domains that account for most employment are the Audio-Visual & Interactive Media, Design & Creative Services, and Books & Press. It is surprising to see the Books & Press domain among the top 3 and continuously on an upward trend in all the provinces given the digital transformation that has been happening in the domain. One would think jobs may be lost because of the increased productivity that comes with digitization.

Figure 27: Employment Trends by Domain: Western Cape

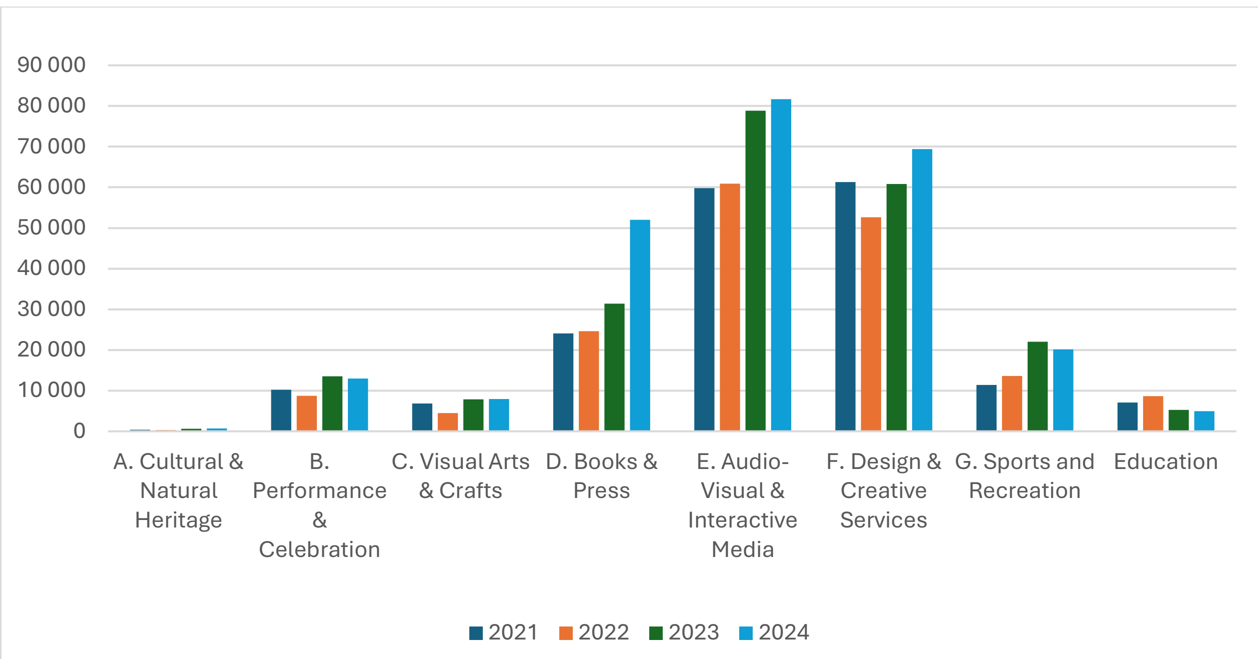


Figure 28: Employment Trends by Domain: Eastern Cape

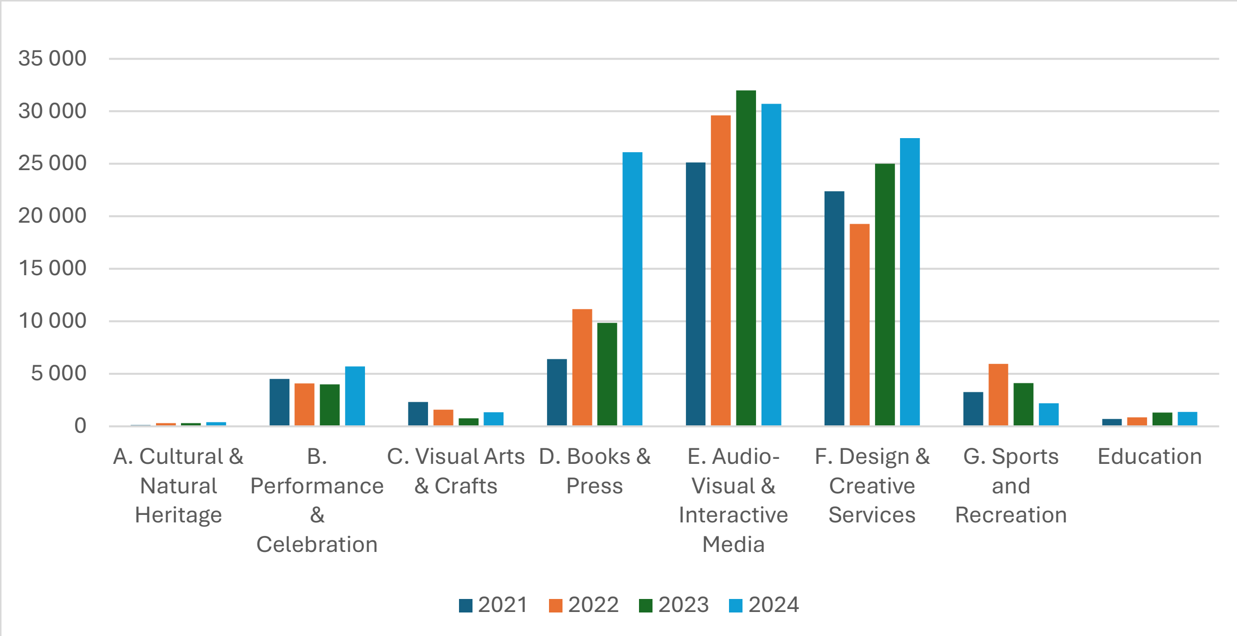


Figure 29: Employment Trends by Domain: Northern Cape

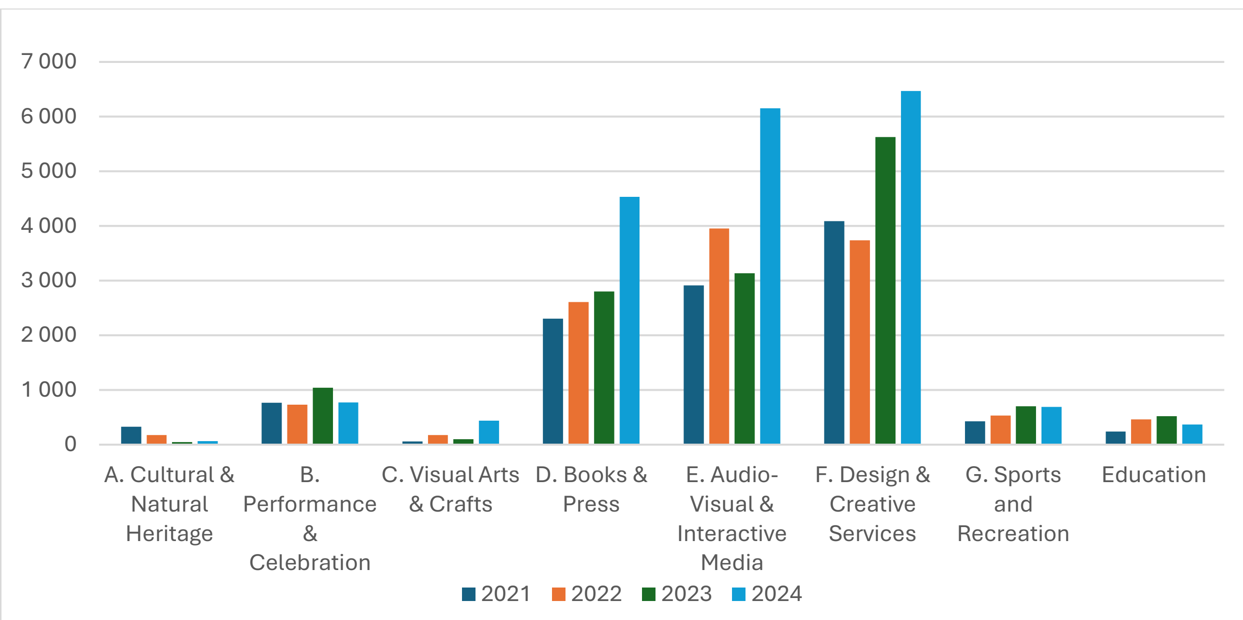


Figure 30: Employment Trends by Domain: Free State

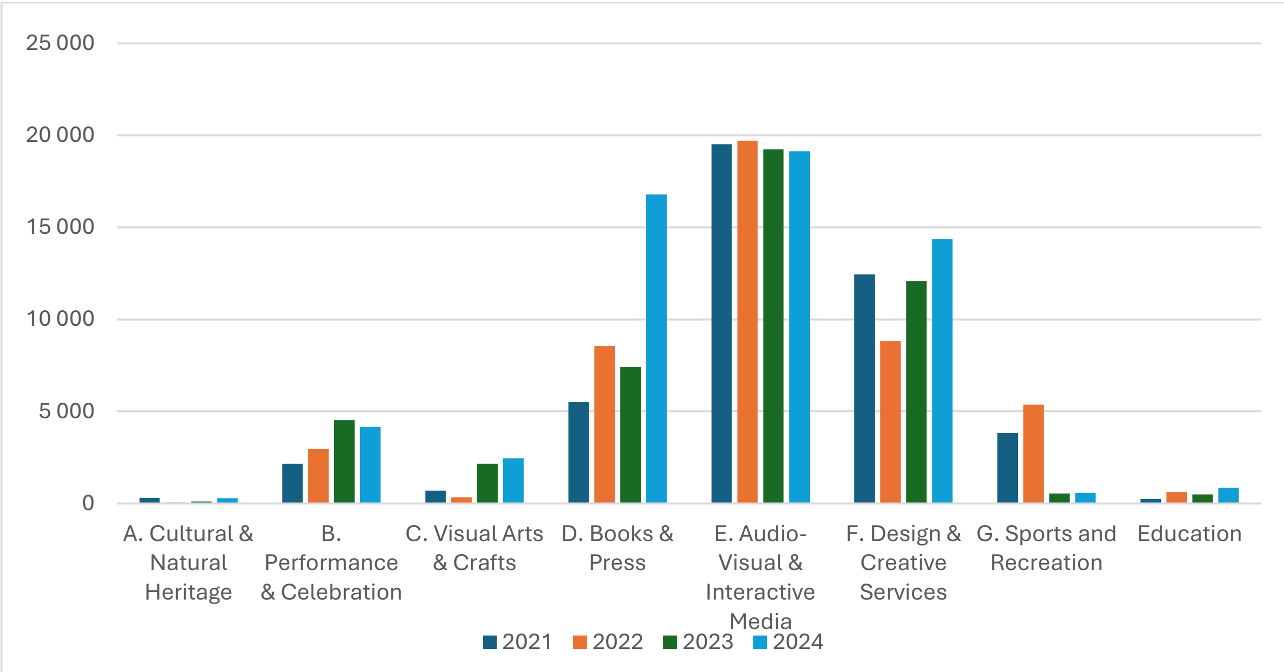


Figure 31: Employment Trends by Domain: KZN

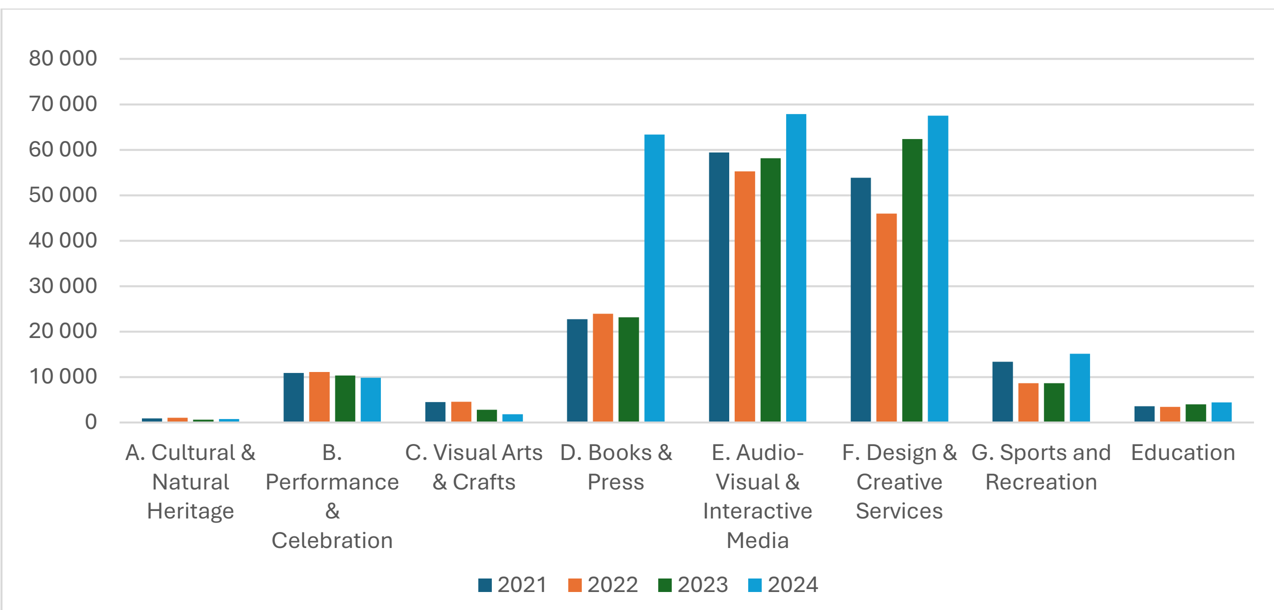


Figure 32: Employment Trends by Domain: North West

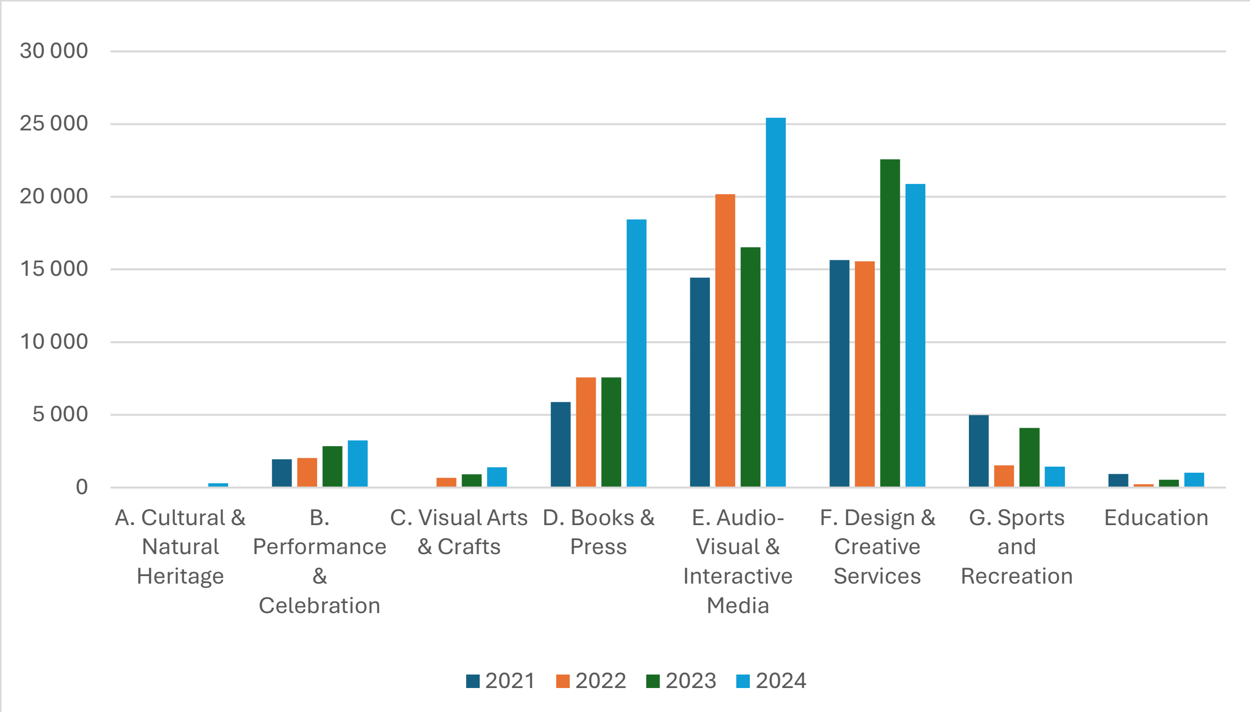


Figure 33: Employment Trends by Domain: Gauteng

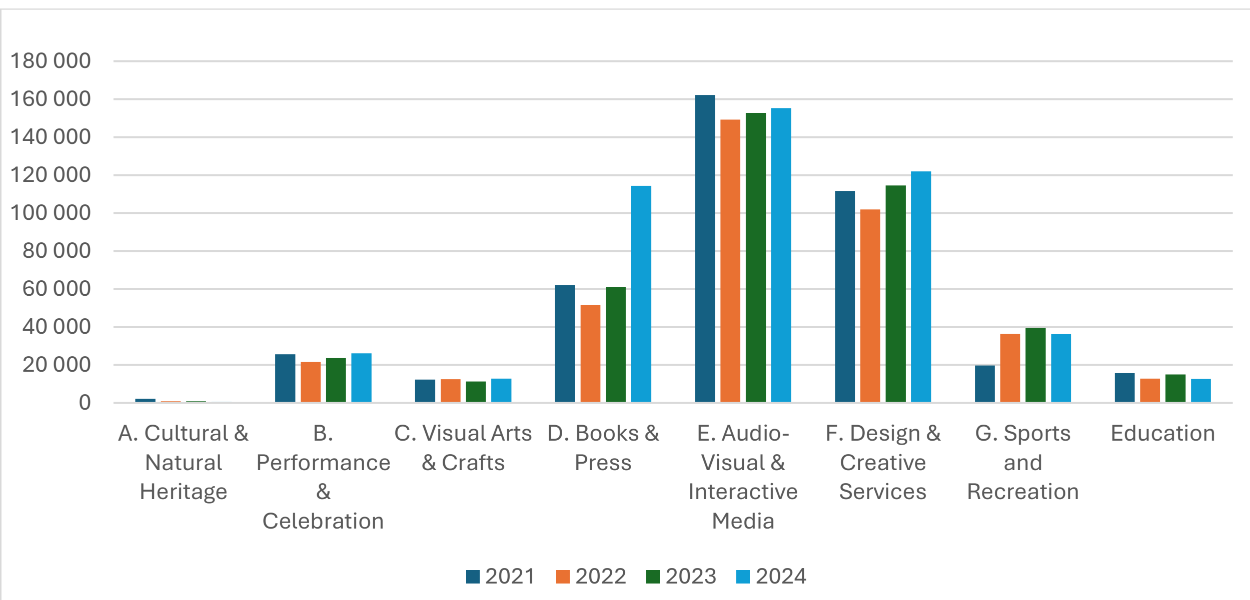


Figure 34: Employment Trends by Domain: Mpumalanga

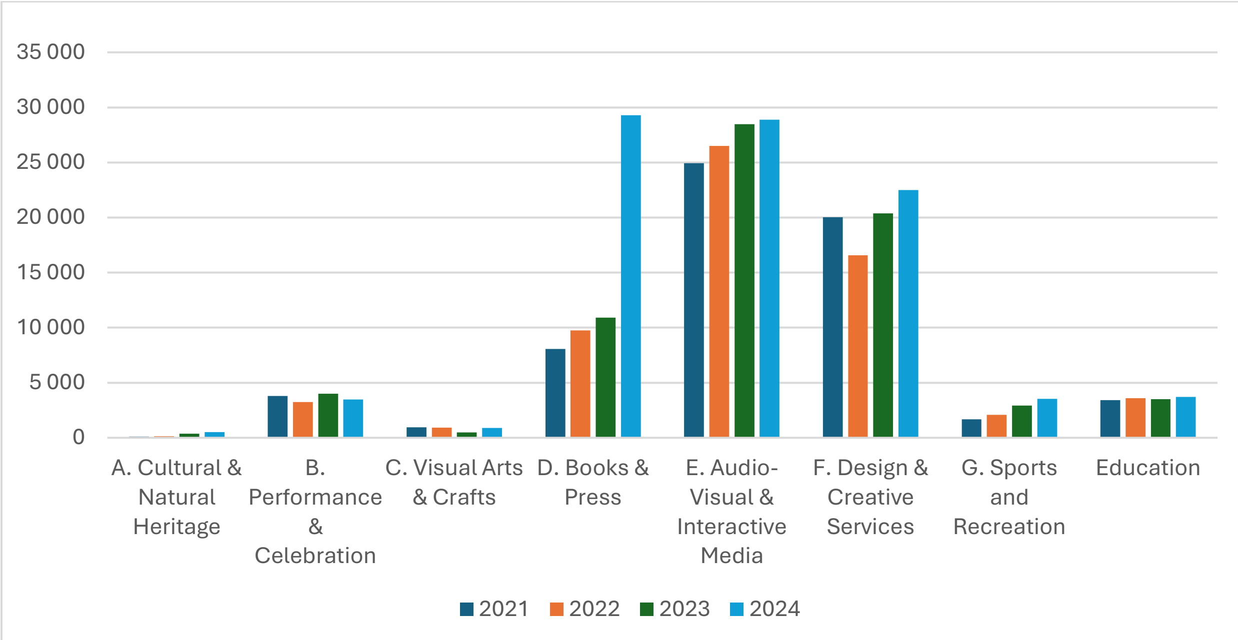
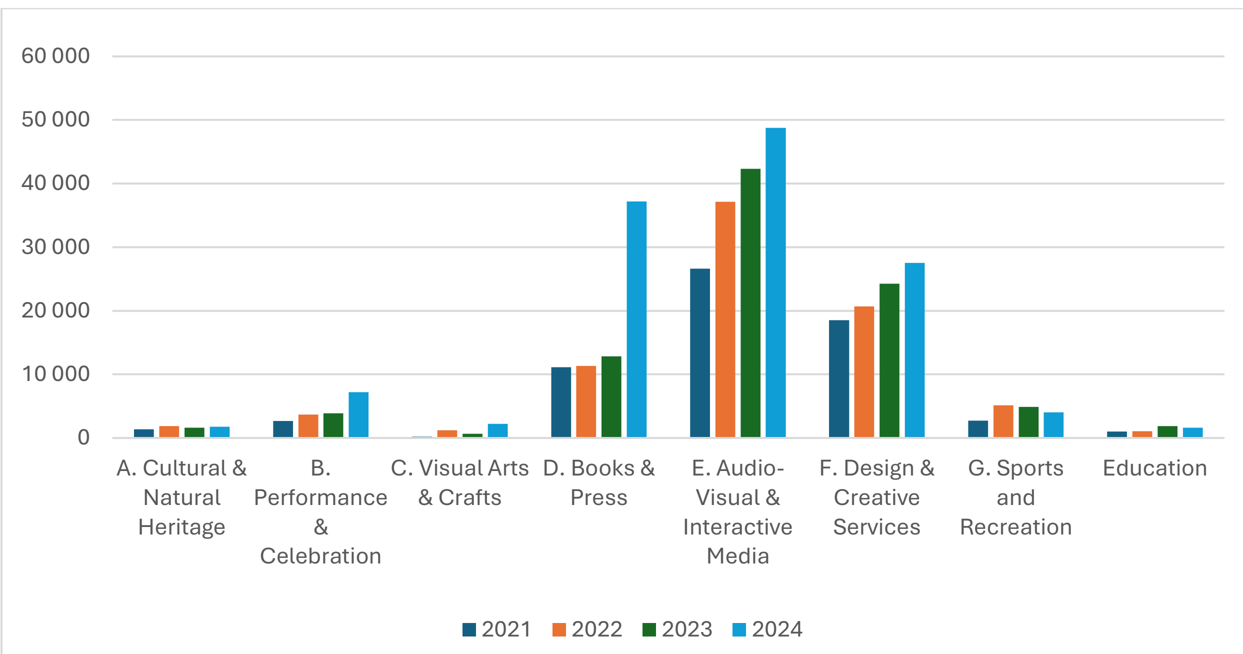


Figure 35: Employment Trends by Domain: Limpopo



5. Conclusion and Recommendations

5.1. Conclusion

The cultural, creative, and sports industries are increasingly recognized as critical drivers of economic growth and social development both globally and within South Africa. These sectors significantly contribute to employment, innovation, and cultural exchange. Globally, the creative industry alone employs approximately 8.8% of the workforce, reflecting its substantial role in providing livelihoods and fostering entrepreneurship. The sports sector employs around 6%, yet its economic impact far exceeds employment figures, as it generates enormous revenue, stimulates tourism, and drives infrastructure development.

Between 2002 and 2011, the global cultural and creative industries experienced remarkable growth, more than doubling in size. This expansion underscores their rising importance in the global economy, further amplified by technological advancements, digital platforms, and increasing consumer interest in creative and recreational activities. Similarly, the global sports industry has seen exponential growth, reaching an estimated value of US$512 billion in 2023, and is projected to grow to approximately US$624 billion by 2027 (BRC, 2023). This growth is driven by the commercialization of sports, increasing global viewership, and the proliferation of international sporting events.

Hosting major international sports competitions such as the Olympics, FIFA World Cup, and the Super Bowl has become a strategic tool for countries to achieve significant economic development. These events attract millions of spectators, media attention, and tourism, resulting in increased foreign direct investment, infrastructure upgrades, and job creation. They promote local economic activity and create a ripple effect that benefits various sectors, including hospitality, transportation, and retail. Additionally, such events foster national pride, cultural exchange, and international visibility, positioning host countries as global players in the sporting arena (Yehyia, 2018).

Within South Africa, the CCI&S sectors are demonstrating signs of increasing diversification. Evidence suggests that these industries are reaching a broader range of demographic groups, promoting social inclusion and economic participation among historically marginalized populations. This diversification can potentially lead to more equitable employment opportunities and a richer cultural landscape. However, despite these positive indicators, there remains a significant gap in comprehensive, accessible data. More detailed data collection, analysis, and dissemination are necessary to evaluate trends accurately, inform policymaking, and design effective programs to support growth and inclusion within these sectors.

Employment is concentrated among the same top 3 domains, i.e. Audio-Visual & Interactive Media, Design & Creative Services, and Books & Press. What is interesting to note is that even though digitization is disrupting many industries, the Books and Press domain continue to be resilient with sustained growth. However, educational publishing contracts amount for the most growth in Books & Press. This context underscores the need for strategies to support other activities in the domain, which may not do well with digitization. Also, the popular economic hubs like Johannesburg and Cape Town host more CCI&S activities in the provinces.

There is limited transformation in the enterprise ownership despite the impressive growth over the years. Enterprise ownership is still in the of white South Africans. Black enterprise ownership is picking up; however, black individuals own less than 40% of the enterprises in the CCI&S industries. The rest of the racial groups in South Africa are even less represented, necessitating governments to step in with the required assistance. Enterprises require funding, and most of the previously disadvantaged individuals do not have resources, hence government assistance is necessary.

5.1. Recommendations

I. **Targeted Policy Frameworks**

The data shows various disparities in the CCI&S. Even though there are improvements in the national trends, provincial trends display gaps that can be addressed by targeted policies. A blanket approach may likely not work for all provinces. Different provinces have advantages in different domains. Similarly, gender and racial participation seem to be improving when looking at the entire industry. However, granular analysis shows critical gaps that needs to be addressed. Targeted policies may be able to address the specific issues identified in the study.

II. **Development of a Robust Data Infrastructure**

The current landscape of statistical data on the CCI&S sectors across Africa is limited and often inconsistent. To address this, it is recommended that a dedicated, unified data portal be established at the continental level, with capabilities to collect, store, and analyze data at national and provincial levels. This portal would serve as a central repository for industry statistics, employment figures, demographics, investment patterns, and other relevant indicators. Improved data collection would support policymakers, industry stakeholders, and development partners in tracking progress, identifying gaps, and shaping strategic interventions.

III. **Transformation and Ownership**

Women are still not well represented in the CCI&S industries. Even though the picture is improving, targeted strategize can drive women to be involved in the industries. Women's involvement must also include participating in premium paying positions, not doing low value work. Regarding enterprise ownership, there is a significant potential for entrepreneurship in the CCI&S industries. The enterprise growth in 2024 is proof of this. The enterprises grew from 82 901 in 2021 to 95 631 in 2022. This indicates potential to establish more enterprises, creating jobs. Support programmes may benefit the previously disadvantaged entrepreneurs. Moreover, capital access is crucial for the disadvantaged groups, especially in high value domains like the Audio-Visual & Interactive Media.

IV. **Enhancing Access to Industry Data**

Data on the sporting industry, both globally and within South Africa, remains sparse. While reports from organizations like BRC provide valuable insights, access is often restricted and costly. SACO could explore establishing an open-source platform that aggregates publicly available data, reports, and research findings. Additionally, SACO might consider investing in key reports and data collection efforts to ensure that stakeholders have access to reliable, up-to-date information to support research, investment, and strategic planning.

V. **Promoting Continental and International Collaboration**

Currently, available reports on the sports outlook in Africa are limited—often in languages that may not be accessible to all stakeholders. SACO could collaborate with continental bodies such as the African Union, UNESCO, or the United Nations to produce periodic industry briefs, country profiles, and trend analyses. These collaborations could help disseminate critical insights, support regional integration, and facilitate knowledge sharing across countries and industries.

VI. **Disaggregated Data for Gender and Youth Inclusion**

Employment and participation data within the sporting industry are limited in their granularity, especially regarding gender and age. To promote gender equality and youth employment, future data collection efforts should prioritize disaggregating information by sex, age, and other relevant demographics. Detailed reporting on these variables would enable the development of targeted policies and programs aimed at addressing barriers and strengthening participation among underrepresented groups.

VII. **Integrating Creative and Sporting Industries Data**

Some existing publications, such as the World Economic Forum's 2023 report, combine employment and economic data for both the creative and sporting sectors. While this synthesis offers useful insights, it is essential that SACO develop a comprehensive approach that maintains both sector-specific and combined datasets. This integrated approach would allow for comparative analysis, identify cross-sector opportunities, and inform holistic policy development that recognizes the unique and shared drivers of each industry.

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