Africa Growth Initiative at BROOKINGS

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THE OUTSIZED POTENTIAL OF THE CULTURAL AND CREATIVE INDUSTRIES IN AFRICA

HIGH DEMAND, HIGH RETURNS

Landry Signé

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ABOUT THE AFRICA GROWTH INITIATIVE AT BROOKINGS
The Brookings Africa Growth Initiative (AGI) works to inform new policies and models for better development outcomes in Africa through rigorous research and analyses, convenings featuring African voices, and direct engagement with African partners.

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INTRODUCTION

The cultural and creative industries (CCIs) represent a highly influential sector of the global economy, generating about 3% of global gross domestic product (GDP) (over $2 trillion in revenues annually) and employing roughly 50 million people, about half of whom are women (UNCTAD 2019; 2021 IFC n.d.). By 2030, the creative economy is projected to grow by 40% (Deloitte, 2021), accounting for 10% of global GDP (IFC n.d.). While the economic and social importance of the CCIs is widely accepted, definitions of the term vary, as do definitions of an important subsector of the CCIs: Entertainment and media (E&M) (McKee et al., 2014). According to the United Nations Conference on Trade and Development (UNCTAD) the CCIs “are at the crossroads of the arts, culture, business and technology…[and] comprise the cycle of creation, production and distribution of goods and services that use intellectual capital as their primary input.” (UNCTAD, 2008) Table 1 provides an overview of the major subsectors in the CCIs and their respective characteristics.

Due to the fact there is little to no impediment to entering the entertainment market, developing countries have the unique opportunity to harness the CCIs to drive sustainable, high growth (Andersson and Andersson, 2006). African countries have particularly strong potential for growth. In 2023, the continent accounted for only 1.5% of the global creative economy and 2.9% of global creative exports (UNDP 2023), while generating 5% of the global cultural and creative jobs (2 million) as of 2022. While Africa’s share of the global CCI economy remains low, it is growing fast, with a reported 13.9% industry growth rate in 2018 and a rise of 4% in CCI-related exports between 2010-2020 (M’Hammdi and Jaïdi, 2023).

The rise in mobile phones and internet connectivity across Africa has transformed the ways people interact with the CCIs and, in particular, the E&M sector. Factoring in the production and distribution of cultural goods and services through mobile devices, social networks, and other digital platforms further drives growth potential (Manyika et al., 2013). By 2050, Africa will be home to one-third of the world’s youth population with the fastest growing creative industry (Bonsundy-O’Bryan and Bonsundy-Obryan 2024). In addition, consumer spending on hospitality and recreation could reach $1.2 trillion (Signé, 2020), leading to incredible opportunities within the entertainment sectors.

Countries such as Mali, Morocco, Mozambique, Senegal, and the Democratic Republic of the Congo already have robust creative industries, while Nigeria, Kenya, and South Africa stand out with outsized E&M sectors, which are projected to grow at significantly faster rates than the rest of the world. Through 2027, these countries’ E&M revenues will continue to increase, with Nigeria’s projected to grow from $6.6 billion in 2022 to $12.9 billion in 2027 (Nex Media 2023). Kenya’s E&M sector has also experienced strong growth in the past decade, including 9.8% growth in 2022, achieving $2.3 billion in revenue (Nex Media 2023). Kenya, unlike South Africa and Nigeria, will also experience growth in all E&M sectors, with internet advertising and over-the-top (OTT) video (defined as video streamed directly to viewers) with the highest growth. South Africa’s E&M market experienced high growth in 2021, bouncing back from the pandemic, and stabilized in 2022, outpacing the global average.

TABLE 1

The cultural and creative sector

Circles	Sectors	Sub-sectors	Characteristics
Core arts field	Visual arts	Crafts, painting, sculpture, photography	• No industrial activities • Outputs are prototypes and potentially copyrighted works (i.e. these works have a high density of creation that would be eligible to copyright but they are however not systematically copyrighted, as it is the case for most craft works, some performing arts productions and visual arts etc)
	Performing arts	Theatre, dance, circus, festivals	
	Heritage	Museums, libraries, archives, archeological sites	
Circle 1: Cultural industries	FIlm and video		• Industrial activities aimed at massive reproduction • Outputs are based on copyright
	Television and radio		
	Video games		
	Music	Recorded music market, live music performances, revenues or collecting societies in the music sector	
	Books and press	Book publishing, magazine and press publishing	
Circle 2: Creative industries and activities	Design	Fashion design, graphic design, interior design, product design	• Activities are not necessarily industrial and may be prototypes • Although outputs are based on copyright, they may include other intellectual property inputs (trademarks) • The use of creativity (creative skills and creative people originating in the arts field of cultural industries) is essential to the performance of these non-cultural sectors
	Architecture		
	Advertising		

SOURCE: Hivos (2018)

From Nigeria to Senegal to South Africa, the growth of E&M sectors is proof of Africa's potential to expand and strengthen existing markets to mutually benefit private business and society. Formalizing[1] the CCIs could unlock this sector and bring tremendous growth to sub-Saharan African economies, especially considering the large role that the informal economy plays in the E&M sector currently. Much of Africa's CCIs are primarily concentrated in the informal economy, with 53.3% of the cultural industries in Senegal, 51.7% in Namibia, and 80% in Kenya found to be in the informal sector in 2020 (Buse 2020). While South Africa is an exception to this trend, the country still has 35% of its cultural industries represented by the informal economy (Buse 2020). Bringing CCIs into the formal economy has the potential to reap high returns for investors and create positive socioeconomic development on the continent (Slavova and Okwechime, (2016).

With these opportunities in mind, this report first expands on the history and trends of the CCIs in Africa before delving into the current driving factors of their growth and major players in the sector. The cases of South Africa and Nigeria are then explored to extract lessons learned from fast-growing CCI sectors on the continent. Next, opportunities for commercial enterprise and economic growth are contrasted with the challenges and risks of entering this market on the continent. The report concludes with strategies by which investors in Africa can intelligently tap into opportunities in the CCIs and capture future growth prospects in the present.

1. The formalization of the CCIs encompasses developing the regulatory frameworks which will protect intellectual property and creative workers; organize the industry with licensing and tax incentives; create the financial mechanisms to facilitate access to credits, grants, and investments; accelerate the growth with scale of creative and cultural enterprises, products, services, and projects; build human capital through appropriate trainings; and foster access to local and global markets.

BACKGROUND: CCI FACTS, TRENDS, AND HISTORY

Adopted in 1969 by the Organization of African Unity, the Pan-African Cultural Manifesto represents the first attempt at creating a consolidated cultural policy framework to promote arts and culture development in Africa, linking this to broader socioeconomic growth (Reis et al. 2008). Since then, African nations and transnational organizations have introduced various proposals to promote CCI development. More recently, in 2018, the African Union introduced the Plan of Action on Cultural and Creative Industries to harness the potential for member states to promote their creative economies (AU, n.d.). In 2020, twelve African heads of state[2] committed to playing a leadership role in facilitating arts, culture, and heritage during the 33rd Assembly of the African Union (AU 2020).

Developing the current CCIs on the continent is an important endeavor. However, it is also important to recapture the culture that has been redistributed and dismantled over time. Africa is poised to retake power over its heritage, enriching the museum and visual arts sectors of the CCIs. Approximately 90 to 95% of African heritage is housed outside the continent, a legacy of colonization that resulted from the plundering of artifacts and artwork by colonizers (Sarr and Savoy 2018). Now, however, there is a growing movement to repatriate this heritage, especially in the wake of the spread of the Black Lives Matter social justice protests in summer 2020 (Gbadamosi 2020). In April 2021, Germany became the first national government to set a timeline for returning some of this looted art, the Benin Bronzes, which were pillaged during an 1897 British raid in what is now the country of Nigeria. Repatriating these artifacts will grow the number and quality of museums on the continent, as evidenced by the fact that the repatriated Benin Bronzes are set to be housed in the newly designed Edo Museum of West African Art in Benin City (Marshall 2021).

The CCIs provide copious opportunities for development across Africa. However, each sector within the CCIs has its own challenges, possibilities, and momentum. Countries have leveraged different sectors to different ends, leading to a varied array of market potential across the region. Some examples and trends from key CCI sub-sectors are explored below.

2. Heads of state from Morocco, Namibia, Kenya, Ethiopia, South Africa, the Democratic Republic of the Congo, Egypt, Cape Verde, Ghana, Nigeria, Congo, and Equatorial Guinea.

Film

Before 2011, Egypt hosted a globally renowned film industry. Among Arabic-speaking countries around the world, Egypt accounted for 75% of all films produced and developed a deep market for original content production (EY, 2015). While the Arab Spring set this industry back—as local production became impossible amidst growing political instability and violence—film industries in South Africa, Morocco, Nigeria, Kenya, and Ghana grew in its stead. These countries hosted cheaper production costs, tax credits for international film companies, and improving infrastructure that has led to an array of international movie productions (Hruby 2018). In 2023, for instance, the Moroccan film industry achieved record profits in large part due to the increase in foreign investment over the past decade. After a reduction of foreign investment of around 50% from 2019 to 2021 due to the pandemic, Morocco introduced a rebate system that attracted foreign film companies to film in the country, leading to record profits in 2023 (Hruby 2018).

Music

African countries' music industries have experienced a similar trend of high growth. The West African archipelago has the highest concentration of musicians per square mile in the world, and the region's various carnivals and festivals attract tourists in large numbers (Koigi, 2021). Before the period of independence, African-made music was barely known off the continent. After 1960, Nigerian artist Fela Kuti's pioneered genre of Afrobeat, a mix between West African jazz and funk music, became popular among activist-minded artists in North America and Europe, as many of his lyrics focus on universal themes like challenging unjust authority and brutality (IFPI, 2016; Pareles 2020). In the 2000s, as broadband connections spread throughout the continent, musicians and listeners alike entered a more equitable arena. Recently, famous musicians including Drake and Beyoncé brought attention to African musicians through mutually beneficial collaborations with them, promoting their music on their own global platforms. The local music market is projected to be $1.7 billion in South Africa, $33 million in Nigeria, and $30 million in Kenya in 2023 (Adams and Adams, n.d.). African music's growing popularity earned itself a new category at the Grammys—"Best African Music Performance"—as of 2024 (Enos 2024).

International interest in African music is increasing, representing a massive opportunity for countries to grow their creative economies and for investors and companies to achieve significant returns. Aside from collaborating with Western-based artists like Beyoncé, African artists are gaining international recognition on their own. For example, South African musician Master KG won the 2020 Song of the Year Award at the NRJ Music Awards, defeating globally-acclaimed Western artists like Nicki Minaj and Jason Derulo (SACO 2020a). Singers like Angelike Kidjo, Burna Boy, Wizkid, Ayra Starr, and Tyla have entered the American mainstream (Cirisano 2020).

Despite the continent's 54 countries and nearly 2,000 local languages, the Western music industry has a tendency to view it as a monolithic region dissimilar to the West, with U.S. artist and repertoire (A&R) reps finding that their strategies do not always work in African countries. There may be universal access to the internet, but music streaming has lagged, resulting in a lack of listener data. Instead, A&Rs in Africa continue to place a strong emphasis on personal connections and intuition. However, major label collaborations are assisting in supplying the analytical tools to quicken the process of talent discovery (Cirisano 2020).

Advertising

As new technology is developed, the creative industries mimic trends in innovation and, as a result, are continually changing. For example, the advertising industry has had to weather the transitions from print media to television promotion and now to internet advertising. As of 2016, global internet advertising surpassed revenue from TV advertising. Terrestrial TV advertising is expected to further contract globally through 2024 due to the continued diversification of TV watching habits and ongoing impacts of the COVID-19 pandemic (PwC, 2020). This decline in TV advertising follows a similar decline in DVD and Blu-ray viewing, although these physical home video formats remain influential in some African countries like Nigeria due to poor broadband infrastructure that limits growth in streaming (PwC, 2019). At the same time, revenue from OTT video, which delivers content via the internet without requiring subscription to a traditional cable or satellite TV provider, should grow significantly. Even countries with current deficits in broadband infrastructure are projected to see growth (PwC, 2019).[3]

CCI consumption trends

While the above numbers tell the story of global trends within cultural and creative industry sectors, a biennial study of Africa's affluent populations by the market research and consulting firm Ipsos indicates how these trends are playing out on the continent in terms of how people are consuming content.[4] The study reveals that over 95% of Africa's affluent population watch international television networks on a monthly basis, indicating that there is a large demand for international media in this demographic. Two-thirds of this group report using devices other than a TV to watch television networks, a higher proportion than a similar socioeconomic group in Europe (Ipsos 2018). Social media and mobile technology are also dominating the statistics of this group's consumption of international media, international and domestic news, and domestic digital entertainment. This study is important to understanding the changing trends within the E&M sector, which no longer relies on physical attendance at entertainment events nor on the consumption of local media. Its focus on more affluent markets provides a preview of which areas may be more likely to become popular, as this income sub-group often acts as a key market influencer. With the rise of online networks for sharing global film, music, art, and other cultural and creative goods, the African continent's CCIs and the entertainment sub-industry in particular are likely to continue to grow and diversify.

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3. See the statistics at https://www.statista.com/outlook/dmo/digital-media/video-on-demand/nigeria.
4. The study focuses on the top 85th percentile earners in Cameroon, Ghana, Kenya, Morocco, Nigeria, South Africa, and Uganda (Ipsos 2018).

BENEFITS OF ENHANCED CCIS: EMPLOYMENT, GROWTH, AND EDUCATION

One of Africa's greatest challenges is its growing population. Over the next 25 years, Africa is expected to see its population double. It is the only region on the globe where the working age population is expected to continue growing beyond 2035 (WEF, 2017a). In fact, Africa's burgeoning young workforce is expected to reach over 600 million by 2030, adding 11 million new workers every year (WEF 2017b). This growing workforce will need employment, but there is no automatic link between population growth and job creation. Currently, Africa suffers from high levels of unemployment and underemployment, especially in its youth population, and failing to address this issue risks social and political instability (WEF, 2017a). Consequently, it is essential to recognize that the CCIs are capable of generating economic growth and can be important mediums for educational development. At the same time, the CCIs are often born out of or developed as a way to reconcile, remember, and safeguard history and cultural identity, which plays an important role across the continent. The preservation of archeological sites, for example, can be a driver for creative industries, while digital museums and exhibits (e.g. "The Unboxing Mayibuye - Access to Digital Heritage" project in South Africa) can contribute to market growth while also preserving vital pieces of history and culture (Agence Française de Développement, 2023). These dual goals—economic development and historical preservation—can both be made possible through the CCIs.

Creating jobs

The CCIs represent an avenue to address youth unemployment on the African continent and promote socioeconomic equality for underrepresented populations. Forecasted revenue increases that accompany a rise in internet access present an opportunity to expand the job market in the E&M sector to meet rising demand. Nigeria's E&M sector, for example, rose 26.6% to achieve a total revenue of $4.4 billion in 2018 (PwC, 2019). The CCIs tend to employ more young people than other sectors of the economy and are more open to a diverse group of participants. In Europe, the CCIs tend to employ more workers in the 15 to 29-year age group than any other sector of the economy. One sector where this demographic opportunity is particularly strong is the music industry: Due to its connections with other industries, music production fosters entrepreneurship and offers promising prospects for youth employment (Solutions for Youth Employment, 2021). At the same time, women tend to participate at higher rates in the CCIs as compared to the workforce average for other sectors (EY, 2015). Given that 60% of Africa's population is under 25 and 51% female, there is an opportunity to leverage this growth in the CCIs to provide employment to these traditionally underserved populations (AU, 2020a).

Catalyzing growth

Aside from creating employment, the CCIs can drive overall economic growth and development on the African continent. The performing arts have been shown to have direct, positive impacts on social progress and economic growth, along with potential positive indirect effects on areas like tourism, nation branding, and environmental stewardship (Kabanda, 2014).

Research has shown empirical evidence linking the creative industries to positive economic development in South Africa (Abisuga-Oyekunle and Siravi, 2018). The South African government has determined that the CCIs accounted for approximately 3% of jobs and 1.7% of GDP in 2016, noting that growth rates of the CCIs were significantly higher than those of the rest of the economy (DSAC, 2020). This accelerated growth amounted to the CCIs making up 2.97% of GDP in 2019 and 6% of jobs, with about 1 million people employed. While South Africa's CCIs are still comprised of relatively small firms, growth in the sector and national plans to increase their development will allow firms to grow and fulfill employment needs across the country.

Likewise, there is evidence that promoting growth in the creative industries can have spillover effects that benefit the development of sectors like tourism and even manufacturing. An example of the role of the CCIs in augmenting growth can be found in Nigeria's film industry, Nollywood. Nigeria produces about 2,500 films a year, with total box office receipts expected to reach $14.82 billion in 2025, increasing at a 16.5% CAGR over the next five years (Stephen 2023). Additionally, the country's music industry has a major impact on the economy (Okoeguale, 2022).

Fashion is another sector of the CCIs that represents an opportunity to catalyze economic growth and employment. In 2015, the African Development Bank Group (AfDB) launched the "Fashionomics" initiative to promote job creation, regional integration, entrepreneurship, industrialization, and equality by growing the textile, apparel, and accessories sector (TA&A) in Africa (AfDB, n.d.a.). The AfDB has projected that further developing the TA&A sector has the potential to create 400,000 new jobs through 2025 (AfDB, n.d.a.), and since a large percentage of its workforce is composed of women (such as nearly 80% in Ethiopia), this development has the potential to advance gender equality in employment as well (AfDB, 2018). Promoting the development of the TA&A also can promote further development of the secondary sector in Africa. In South Africa alone, 2.5% of total manufacturing output was represented by the clothing, textile, footwear, and leather sectors as of 2020 (Department of Trade and Industry and Invest South Africa, 2020). Already, the combined apparel and footwear market in sub-Saharan Africa has reached an estimated value of $31 billion. While Ethiopia, South Africa, Mauritius, Madagascar, and countries in North Africa have all seen growth in their TA&A sectors, other African countries are lagging (AfDB, n.d.b.). Since approximately 90% of fashion businesses in Africa are in the informal sector, formalizing this sector has the potential to reap significant rewards both to investors and general society (Dakora 2019).

Enhancing education

The CCIs can also help bolster efforts to address structural deficits in training and education on the continent. While Africa has a rapidly growing labor force, the World Economic Forum's Human Index found that sub-Saharan African countries only capture an average of 55% of the human capital potential of their workforce, 10% lower than the global average (WEF 2017c). This dearth in skilled labor is compounded by gaps in the current education system, which has only been exacerbated in the wake of the COVID-19 pandemic and resulting school closures (Signé 2022; Ndejjo et al., 2023). However, the CCIs can provide nontraditional ways to promote education and early childhood development. Buckingham and Scanlon (2000) have coined the term "edu-tainment," defined as a "hybrid genre that relies heavily on visual material, narrative or game-like formats, and more informal, less didactic styles of address," showing how educational entertainment materials can be disseminated by the CCIs (Okan, 2003). Although researchers recommend avoiding television exposure for children under two (Anderson and Subrahmanyam, 2017), a study of the U.S. children's program Sesame Street found that it improved school performance among preschool-age children in the country, illustrating how the CCIs have the potential to augment education outcomes (Kearney and Levine, 2019). Researchers also have explored using digital games to enhance learning in the classroom (Subrahmanyam and Renukarya, 2015), and in South Africa, the publishing sector is dominated by educational materials (Business Wire 2020).

Podcasting is another tool that has become popular in educational settings. A study in South Africa found that non-traditional students (typically older than average, and/or part-time students, with work experience, family responsibilities, etc) were most likely to listen to podcasts made available to them by their instructor and often listened to each podcast multiple times to fully grasp difficult material (Gachago et al., 2016). A recent rise in indigenous language podcasts has expanded listenership across the continent, providing an opportunity for both active and passive learning. Additionally, podcasts' digital format provides a platform for cross-cultural conversations and knowledge-sharing as they can be accessed anywhere in the world (Ifedayo, 2023). A study on universities in South Africa found that the use of podcasts in mediating tasks escalated learning (Ng'ambi, 2008). As mediums change to reflect new technological advances, the potential for creating entertaining educational materials must continue to adapt.

KEY DRIVERS OF CCI GROWTH

The uptick in technology on the continent is a broad driver of growth within the CCIs, and in particular, the E&M sector. Internet access increasingly allows more consumers to participate in media creation and sharing and expands the rate of consumption. Likewise, technology has led a transition from physically to digitally enabled goods and services in many sectors. While there always has been a demand for cultural and creative entertainment, the digital revolution on the continent has transformed the way consumers can access this content. The most visible drivers of the sector in Africa are increasing infrastructural access to technology, the shift to digital goods, the rise of digital payment platforms, general consumer market growth, and an expanding sub-industry of advertising.

Infrastructural access to technology

Increasing access to technology infrastructure is allowing businesses in Africa to leapfrog over previously impenetrable barriers to expansion, fueling the growth of the CCIs and, in particular, the E&M sector in Africa. By 2025, Africa is expected to have 751 million unique mobile phone subscribers covering 53% of the continent's population (GSMA 2024). In 2020, the Alliance for Affordable Internet, which measures the affordability of mobile broadband globally, found that compared to other world regions, Africa saw the fastest policy advances in achieving greater internet affordability, with a 6.7% improvement from the previous year (Alliance for Affordable Internet 2020). The increasing availability of information and communication technologies (ICT) has already expanded the CCIs in large economies like South Africa and Nigeria, but other countries are gaining ground and becoming better able to accommodate budding digital media and entertainment products. For instance, Ghana now has the highest mobile penetration in West Africa, at 55% of the population (Shanahan and Bahia 2024), and its E&M market also has a higher projected CAGR relative to that of South Africa, Kenya, Nigeria, and Tanzania through 2023 (PwC, 2019).

Shift to digital goods

The development in technology and internet access has opened whole new segments of the CCIs, including e-publishing, video streaming, and music streaming. Growth in these sectors has become the primary driver of many traditional industries. In South Africa, the electronic book sector represents a growth area, while the distribution of traditional printed books has declined, especially as schools and universities transition to using online publications (Business Wire 2020). In 2019, digital publications accounted for over half of the revenues from imported professional books in the country (Business Wire 2020). Global music and film industries also are becoming more reliant on technology as music and movies are increasingly distributed via streaming platforms and online downloads. In fact, streaming revenues accounted for more than half of the recorded music revenue for the first time in 2019, illustrating the growing importance of streaming technologies worldwide (IFPI, 2020). The reliance of the film industry on digital platforms has been compounded by the COVID-19 pandemic, which drove many studios to release new movies via streaming platforms in the wake of cinema closures.

In general, COVID-19 accelerated the shift to digital goods, even in sectors of the CCIs that traditionally would not be associated with the digital landscape. For instance, Africa's largest multi-arts festival, the Grahamstown National Arts Festival in South Africa, shifted to hosting an 11-day online event in 2020, selling tickets on a pay-per-view platform to view live and pre-recorded performances, films, and even physical art (National Arts Festival 2020). Ultimately, the rise of digital goods necessitates an integrated knowledge of technology to thrive within this sector. At the same time, the existence of creative goods and services on digital platforms allows for their near permanency and global distribution, thus increasing the overall potential for returns. For instance, the song "Jerusalem" by South African artist Master KG boasted 143 million Spotify streams from 18.5 million listeners in 92 countries by the end of 2020 (SACO 2020a).

Increasing competition among digital content providers has enabled the development of improved goods and services for consumers, creating a dynamic market that is highly responsive to consumer demand. One area that exemplifies this consumer market transition is the TV and video sub-industry. The reliance of this industry on new technology has created a niche market through which consumers have quickly adapted, leading developers to provide products and services that better fit their demands. In particular, individuals are seeking mobile viewing options that allow for more preferential, customized consumption, instead of the traditional focus on subscription services that offer access to a fixed range of content that may not align with a consumer's unique interests (PwC, 2017).

Companies will need to innovate and create new products and user experiences that ensure their place in these newly digitalizing markets while continually engaging with production and distribution partners in the E&M sector and beyond.

Digital payment platforms

In terms of real economic growth, the introduction of digital payment platforms, by which consumers can immediately pay for media content from anywhere with internet access, is the new reality that businesses can take advantage of for greater revenue. Digital revenue tends to have significantly higher growth rates compared to nondigital revenue in major E&M markets on the continent (PwC, 2017).

The new digital payment reality opens an array of commercial opportunities for smaller firms that are intent on expanding their market access and consumer base. Digital payment is possible in almost every sub-industry of the CCIs, including music, film, physical art, video games, social media applications, and news, among others. In Kenya, the M-Pesa digital payment platform allows for single-use payments to entertainment and media producers, as well as digital subscriptions to applications, streaming services, or other digital mediums. These mobile payment platforms also can reduce the need for consumers to curtail their purchases of cultural goods in the wake of economic hardships. For instance, M-Pesa mobile money was found to help families better cope with financial shocks like an unexpected illness without having to reduce their consumption, since they were able to borrow and transfer money from friends and family via the electronic platform (Hattingh, Leke, and Russo, 2017).

Consumer market growth

Consumer market growth and the rise of the middle class are primary drivers of the CCIs, particularly in the context of E&M production. In Africa, the middle class has tripled to 313 million (34% of the total population) over the past 30 years (AFR-IX Telecom 2020) and the number of high- and middle-income consumers is projected to grow by 100 million people by 2030. In fact, by 2030, total consumer expenditure on the continent is expected to reach a remarkable $2.5 trillion (WEF, 2017a). Income group has been found to be strongly correlated with spending on entertainment, even outstripping factors like age in determining entertainment spending (Lobaugh et al. 2019). Africa follows this trend, with cultural goods like African fashion expected to become increasingly in demand as the domestic middle class expands (AfDB, n.d.b.).

As its consumer market grows, Africa is becoming increasingly powerful in shaping the landscape of the global CCIs, as more companies seek to capitalize on this burgeoning market and appeal to local tastes. Netflix has increased its investments in producing original content on the continent, especially in the Nigerian and South African movie industries (Kazeem 2020). In 2020, the largest music label in the world, Universal Music Group, launched a standalone label, Def Jam Africa, to develop hip-hop, Afrobeats, and Trap music from African artists (Universal Music Group 2021). Aside from appealing to Africa's growing consumer market, this focus on promoting local content has galvanized the spread of African CCIs globally, as evidenced by the increasing popularity of Nollywood films, rising demand for African fashion prints, and enhanced interest in African art and music. South Africa, for example, saw its cultural goods exports grow a remarkable 14.6% per year between 2015 and 2018, a rate that is significantly faster than exports of other goods (SACO 2020a).

Ultimately, the globalization of African art and media encourages investment and further builds the consumer base to which African artists and media producers can market their products. The incredible success of the movie Black Panther released in 2018, which leveraged African culture and earned more than $1.3 billion worldwide has contributed to the global expansion of Africa's CCIs (Hruby 2020). Similarly, the increased presence of major players such as Universal Music Group, Sony Music, Warner Music Group, Netflix, and Apple Music provides another illustration of the business appetite and potential for growth of CCIs in Africa (Hruby 2020). The consumer base in Africa is growing, and global industry leaders are catching on.

Advertising as a tool for growth

Advertising revenue is a critical component to help fund development and increase awareness of the CCIs, particularly in the E&M sector. While revenue generated through initial adoption of digital mediums and through the continued access to those mediums through subscription fees are important, these revenue streams are often stagnant after the initial adoption of the technology or service. Advertising provides a revenue stream that is not dynamic, with multiplying factors that increase revenue with both the initial and continued use of digital media. Where the rate of movement toward internet access revenue slows, consumer use and advertising potential increases, presenting opportunities for unlocking new revenue sources.

Internet advertising represents a significant subsector for growth, controlling a steady 13% CAGR from 2016 until 2022 (PwC, 2016). As of 2020, Africa's total annual advertising investment was over $10 billion, 40% of which was digital advertising. In 2024, Africa's ad expenditure reached $11.5 billion (Navarro 2024) and digital advertising is expected to make up 60% of all advertising on the continent by 2030 (Statista Market Insights 2024). In 2018, TV and video represented the largest advertising segments in South Africa, Nigeria, Kenya, and Ghana, while radio was the largest segment in Tanzania (PwC, 2019). Advertisers across the continent are gaining access to multiple platforms of consumers within the E&M sector, thus increasing the inherent persuasiveness of their campaigns and the potential for acquiring revenue. Internet advertising surpasses TV advertising in terms of absolute growth, but both are critical to the sector due to linking to mobile devices (PwC, 2019). The development of mobile applications on the continent is also leading consumers to integrate media products into their everyday lives. Content generators are also increasingly able to access consumer data, gain insight into consumer demand, and generate new opportunities for revenue (PwC, n.d.). Since nearly half of African consumers have indicated that marketing messages have a significant impact on their purchasing behavior, companies looking to reach and influence consumers will find it useful to advertise through online services (Nielsen, 2014). Advertisers must be adaptable to these trends to tailor entertainment and cultural products to the growing consumer classes.

KEY PLAYERS IN THE CCI LANDSCAPE

The production of media and entertainment often requires ample start-up capital. Films, music, and art are now generated and distributed in an era of high-cost technology, and their production is dependent on investments. Likewise, technology investments are key to shaping connectivity on the African continent, a crucial factor in the growth of streaming platforms and sectors like gaming. Just $22 million, or 1.7% of African startup investment funding, was allocated in 2023 to the entertainment sector (Galal, 2024). To close these gaps and help creatives get a head start on building long-lasting careers, the HEVA Fund was established in 2013, fully devoted to expanding the CCIs (HEVA Fund 2024). Alongside foreign investors and companies, other key players essential to facilitating the expansion of the CCIs in Africa include domestic media companies and government ministries and agencies (Comunian et al., 2021).

International media companies

International media companies are increasingly looking to Africa and African artists as an opportunity for investment. Vivendi, a French media conglomerate that has operations in music, television and movies, publishing, and video games, is particularly active on the continent—as evidenced by the previously noted presence of Vivendi's Universal Music Group (UMG). The company already has divisions in Nigeria, Kenya, South Africa, Côte d'Ivoire, Senegal, Cameroon, and Morocco, and has announced plans to expand further in Africa.

Often, international media companies have to leverage partnerships and work creatively to bridge the gaps in infrastructure when operating in Africa. Vivendi's CANAL+ Group represents the current market leader in pay-TV on the continent. In 2019, Canal+ acquired IROKOtv's ROK film studio (Nigeria), Zacu Entertainment (Rwanda), Marodi TV (Senegal), and MC Vision (Mauritania) (Otomewo 2025). The company is currently in the process of acquiring Multichoice out of South Africa, which controls the largest share of satellite pay-TV in sub-Saharan Africa, with over 23.5 million subscribers across 50 markets (Crouth 2024). Vivendi also has one of the largest networks of theatres and live event venues in Africa with the CanalOlympia network, which span 14 venues in 10 countries and host films, live events, and even escape rooms. By partnering with Bluestorage, CanalOlympia's cinemas are self-powered through solar, which allows a more reliable and accessible energy source compared to existing infrastructure, and the company's success has led to a planned expansion to 50 venues total across Africa (Bluestorage n.d.).

Another international company, Pearson, has captured the largest market share in the educational publishing segment in South Africa (Business Wire 2020). The media group Trace, headquartered in Paris, France, is another high achiever as one of the largest afro-urban entertainment companies on the continent, providing artists the opportunity to share their work across their networks of radio, television, and digital platforms (Amawhe 2018; Ramjee 2023).

As illustrated by these success stories, international companies have found an eager consumer market in Africa. In fact, the demand for digital material in Africa was intensified by COVID-19 to the point where Netflix announced in April 2021 that it will reduce its bandwidth for African members by 25% in order to alleviate the strain on network infrastructure. Other streaming services are looking to enter the African region and capitalize on its large and growing customer base. In March 2019, Google's YouTube Music service entered the market, competing against other international companies with existing footholds like Spotify and Apple Music (PwC, 2019). Disney+ also entered the African market in 2022 and is projected to grow to have 3.13 million subscribers by 2026 (Digital TV Research, 2020).

These examples—spanning across sub-industries and sectors—showcase the attractiveness of the African market to large international media companies and the potential for growth therein. This increased attention could draw more international attention to African E&M practitioners while setting up Africa as a viable, competitive market for CCI service providers.

Domestic media companies

While international companies are gaining a strong foothold in Africa, domestic media companies also play a powerful role in the E&M market and can act as valuable partners for international companies entering the market due to their trusted brand names and local knowledge. Domestic companies represent a large portion of the local music streaming market. A 2020 study of music streaming platforms found that of the over 25 companies in Africa, 72% were homegrown and only 28% were international companies (WT Research 2020). Radio Audience Measurements estimated that 75% of South Africans over the age of 14 listened to the radio on average of more than five hours per day in 2023. Even with streaming options continuing to grow, South Africa's radio industry continues to thrive with over 300 radio stations across four languages (Bizcommunity 2024). This is also true in Kenya, with 75% of people saying they listen to radio content and local content outpacing foreign content (Media Council of Kenya, 2024). Because radios are more portable and significantly less expensive than televisions, rural areas in Africa vastly outpace urban areas in these statistics (Grange, 2020).

Naspers of South Africa is the largest and probably most famous African media company. Naspers is colloquially known as "Africa's SoftBank" for its wide-reaching global investment portfolio, with its most famous investment probably being its early stake in the Chinese media giant Tencent. However, Naspers' role in the CCIs in Africa extends beyond its international investment activities. The company operates Media24, the largest publisher, printer, books and magazines distributor, and newspaper publisher in Africa (Reuters 2020). As of 2020, Media24 was responsible for publishing 13 magazines and more than 60 newspapers. It also has a robust digital media presence, generating nearly "17 million average daily page views, across its digital platforms." (Media24 2025)

Naspers also was an influential player in the development of the pay-TV company MultiChoice

Group. Although challenged by the COVID-19 lockdowns, the company made significant investments in filming local content, producing 1,870 hours in 2020 and growing its domestic content archives to nearly 59,000 hours (MultiChoice Group 2020). The company's Showmax platform is projected to increase its paying subscriber count by one million by 2025, driven by its new Pro platform, which offers online sports streaming and lower prices for mobile subscribers. Likewise, Showmax is able to extend its reach to additional households as a free extension for pay-TV subscribers (Digital TV Research, 2021a). In November of 2023, Showmax dethroned Netflix as the most popular streaming service on the continent after partnering with HBO and Comcast to provide international English-language content while maintaining a curated mix of content suited for their African audience (Dosunmu 2024).

Domestic players are increasingly partnering with international media companies, which recognize their influence in reaching the African consumer. MultiChoice Group is a prime example of this. Aside from its aforementioned partnership with Netflix, MultiChoice also announced plans to offer Amazon's streaming content through Showmax, seeking to create a one-stop shop for African consumers and relieve pressure from competition from international streaming services by making them partners rather than adversaries (Bloomberg 2020). Vivendi's Canal + Group currently has a 31.7% stake in MultiChoice Group and made an offer to fully acquire the group in 2024, acknowledging the rising demand for local content by consumers (Goodfellow 2024).

Government cultural ministries and agencies

While the involvement of government is typically crucial to shaping the development of the CCIs, government cultural ministries and agencies in Africa suffer from a dearth of financial support. The African Union declared 2021 to be the year of "Arts, Culture and Heritage." The African Union champion for the year, transition President of Mali Bah Ndaw, highlighted the fact that most African countries make insufficient budgetary allocations to the culture sector, arguing in favor of allocating at least 1% of national budgets to the CCIs (AU, 2021b). Insufficient funding significantly hinders the potential of the CCIs to create beneficial growth and development on the continent (UNESCO 2021). In Kenya, for instance, the 2020 budget only allocated 0.16% of total national government expenditures to the Department for Culture and Heritage (National Treasury of Kenya, 2020). In Ghana, the numbers were similar, with the Ministry of Tourism, Culture and Creative Arts having projected expenditures of approximately 0.17% of the total federal government budget in 2021(Government of Ghana, 2021).

While many ministries suffer from a lack of sufficient funding, there is still progress being made on the continent. To begin to address the funding shortfall mentioned above, Kenya's parliament passed the Creative Industries Bill in 2024, creating a framework to support local, regional, and international development of creative works by assisting with infrastructure, marketing, and public and private funding opportunities for creative industries (Okech, 2024). South Africa is another African country that has shown an increased interest in the potential of the CCIs for contributing to long-term economic growth and job creation. In 2014, the South

African Department of Sports, Arts, and Culture (DSAC) launched the South African Cultural Observatory (SACO) as part of its Mzansi Golden Economy Strategy, which promotes the arts, culture, and heritage sectors and the CCIs in order to stimulate the economy. SACO undertakes research on the specific impact of these industries on the overall economy, helping to provide greater justification for their support (SACO n.d.). In the wake of the COVID-19 pandemic, DSAC, in collaboration with the Department of Small Business Development, established a fund to provide relief to the craft, design, audio-visual, and visual arts sectors (Department of Sports, Arts, and Culture and Small Business Development, 2020). In keeping with its growing interest in the CCIs, South Africa is one of the countries that has stepped up the most to support its struggling arts sector in the wake of the coronavirus pandemic. For instance, DSAC has offered relief money for productions and live events that were disrupted due to the pandemic (DSAC and Small Business Development, 2020). However, while South Africa is more aware of the socioeconomic benefits of the CCIs, the country still allocated less than 0.4% of its national budget to DSAC in its 2021/22 budget (National Treasury of the Republic of South Africa, 2021).

To be better equipped to promote the growth of the CCIs in their respective countries, cultural ministries and agencies in Africa need to receive greater financial support going forward. At the same time, progress has been made: Governments in countries such as Burkina Faso, Cabo Verde, Côte d'Ivoire, Kenya, Mauritius, Nigeria, Senegal, South Africa, and Zimbabwe have allocated funds to help the struggling arts sector in the wake of the COVID-19 pandemic, with some offering aid for the very first time. The ramped-up support as a result of the pandemic should be continued as a new reframing for how African governments allocate support to the CCIs (Joffe, 2021).

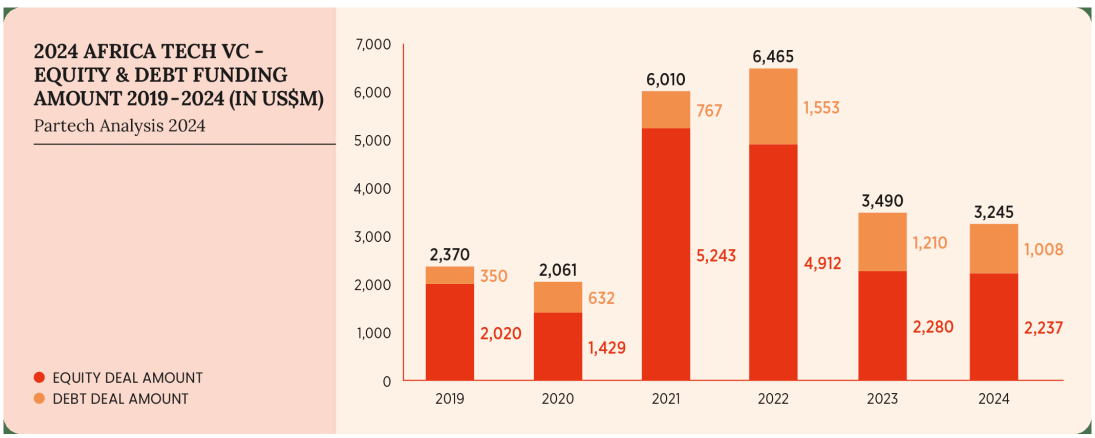
Technology investors

A key trend shaping the E&M market in Africa is the investment from technology companies in improving internet connection and access on the continent. Increased investment in technology infrastructure is crucial, since internet and mobile phone penetration have been shown to impact foreign direct investment, producing positive effects on both GDP growth and GDP per capita, which in turn improves consumers' ability to purchase entertainment products (Asongu and Odhiambo, 2020). The digital operator MTN is a big domestic player investing in technology on the continent. Headquartered in South Africa, MTN operates in traditional telecommunications, digital infrastructure, and FinTech and had roughly 291 million customers in 16 markets in Africa and the Middle East as of 2024 (MTN, 2025).

Investments in the cloud are increasingly driving the growth of the gaming sector in Africa. Today, data centers exist across the continent with a market size expected to cross $3 billion in 2025. Of the 10 biggest data centers in Africa, four reside in South Africa, four in Nigeria, one in Kenya, and one in Ghana (Derrick 2023). Intel and Nvidia have increased investments in cloud gaming, illustrating the rising competition in this sector on the continent. These investments should lead to fewer instances of service lags, which can benefit the growth of the gaming sector by ensuring local gamers will no longer be hindered by these lags when competing (PwC, 2019). Since the current online gaming market is fragmented but expected to grow due to the increasing penetration of mobile applications, enhanced investments in the cloud will only help to drive this growth path (Mordor Intelligence n.d.).

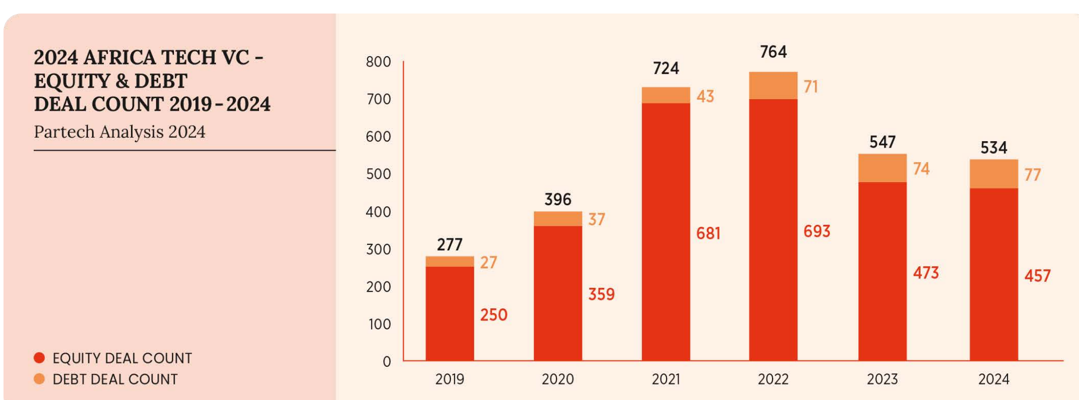
In general, tech investors are becoming increasingly interested in Africa as an investment target. Figure 1 shows the sustained increase in tech venture capital equity deals between 2019 and 2022. In 2022, these 693 equity deals led to total funding commitments of $4.9 billion, as noted in Figure 2 (Partech, 2025). Unfortunately, in 2023 there was a 50% decrease in the number of investors. This downturn can be credited to macroeconomic factors such as high interest rates, currency devaluation, and inflation as well as a significant investor withdrawal from the African market from international investors (Partech, 2024). 2024's VC activity was relatively the same as in 2023. Despite this relatively flat growth from 2023 to 2024, Africa's VC market is performing slightly better than the global market as a whole. Notably, the fourth quarter of 2024 experienced a significant upswing as evidenced in Figure 2 (Partech, 2025). Investors are expected to return to the continent as geopolitical and macroeconomic concerns stabilize and tech start-ups continue to flourish (Adekoya, 2024).

FIGURE 1



SOURCE: Partech, 2025

FIGURE 2



SOURCE: Partech, 2025

OPPORTUNITIES TO LEVERAGE THE CCIS: TWO COUNTRY CASE STUDIES

There are numerous opportunities on the continent for investors, firms, and individuals to capitalize on the growing importance of the CCIs. While South Africa and Nigeria are playing a role, other countries also are cultivating growth in their CCIs, leading to opportunities throughout the continent. In particular, the E&M sector presents critical opportunities for investors and firms seeking visibility on the continent and in global markets: As of 2022, there are already an estimated 1.4 million video-on-demand subscribers in sub-Saharan Africa, and by 2026, that number is expected to increase to 2.4 million (Roxborough 2022). Using South Africa and Nigeria as examples can be useful to see how the CCIs can be leveraged more broadly on the continent.

South Africa

The CCIs in South Africa have exhibited remarkable growth over the past few decades, becoming an increasingly important source of employment and economic development in the country. In 1995, South Africa's film industry employed only 4,000 people. As of 2019, the industry had grown to employ more than 38,000 people and contribute approximately $68 million to the country's GDP (National Film and Video Foundation, 2021).[5] In 2018, the CCIs as a whole directly accounted for 1.7% of South Africa's GDP, and in 2017, creative economy employment represented 7% of all jobs (SACO, 2020b). When considering both direct, indirect, and induced impacts from the CCIs, 69% of GDP impact was found to result from CCI multiplier effects, illustrating how growth in the CCIs benefits other parts of the South African economy (News21, 2021). This growth is projected to continue, as South Africa's E&M sector is estimated to reach approximately $12.9 billion by 2027, buoyed by increasing levels of internet access (PwC, 2023). The South African Broadcasting Corporation radio station Ukhozi FM has more than 7.6 million listeners, making it the biggest radio station in Africa.[6]

South Africa has become a hub for cultural events and festivals, with the Cape Town International Jazz Festival as one of the largest music festivals on the continent, bringing together well-known international and local performers. This is understandable, considering that South

5. Calculated using an exchange rate of $1 USD to R14.343 (approximate spot rate on 31 March 2019).
6. See Ukhozi FM's statistics here https://www.ukhozifm.co.za/ukhozifm/about-us/.

Africans were ranked as some of the most enthusiastic music consumers in the world (IFPI, 2019). The country also boasts the largest multi-arts festival in Africa, the National Arts Festival in Makhanda (NAF). Held for a period of 11 days, NAF typically attracts over 200,000 visitors to view over 2000 performances, contributing approximately $24.7 million to the Eastern Cape Province in 2016. In recent years, NAF has expanded to feature diverse subsets of the CCIs, including music, dance, theatre, and craft markets (SACO, 2018).[7]

Visual arts and design also represent an important area of growth and development. The South African government estimates approximately 17,000 people work in the visual arts sector (Department of Arts and Culture, 2010). The country is now considered to be the leading arts market on the continent, with over 10 auction houses and dozens of notable art galleries (Mutu 2020). In 2017, the country saw the opening of the largest contemporary art museum in Africa, Zeitz Museum of Contemporary African Art (Zeitz MOCAA) in Cape Town, a project that arose from a $38 million renovation of a grain silo complex (Katz 2017) and welcomed nearly 300,000 visitors in its inaugural year (Zeitz MOCAA 2019). South Africa also is home to two of the top 100 architectural firms in the world, with local companies SAOTA and Boogertman + Partners being ranked 90 and 98 respectively based on the number of fee-earning architects they employ (Building Design 2021). The architecture sector should continue to grow, with the South African construction industry reaching $25.5 billion in 2022,[8] driven in part by growth in residential sector construction due to competition between mortgage lenders and more favorable loan terms offered by banks (PR Newswire 2020).

In the E&M market, revenue growth in South Africa can be attributed to internet access and changes in consumer demand. As the largest TV market on the continent, South Africa's economic growth is impacted by TV market revenue from advertising and content production. Pay-TV is one subsector that is projected to continue growing. About 9 million households in South Africa have pay-TV as of 2022, which is projected to grow by 18 to 20 million by 2027 (Business Wire 2023). These high levels of consumption are leading pay-TV companies like MultiChoice to innovate for further growth by, for example, making deals with international sports and entertainment providers to air events such as games for the UEFA Champions League and the English Premier League. Through this, the companies can provide consumers with desired content and strengthen their hold on the market (Business Wire 2023).

South Africa's film industry presents steady opportunities for investors and firms seeking high potential for growth. Box office sales and cinema advertising are two areas that bring in consistent revenue, although both have been hurt by the effects of the COVID-19 pandemic (PwC, 2020). In addition, South African films are becoming more popular on the international stage. South African films, actors, and crew have received some of the highest recognitions at global cinema awards shows, such as Tsotsi (The Last Ranger) which was nominated for an Academy Award in the Best Live Action Short Film category in 2025. The film industry is dually important for infrastructure development and tax revenue for social services, contributing

7. Calculated using a spot rate of 1 rand = $15.23 USD (approximate spot rate in 2016).
8. See the data at https://www.globaldata.com/store/report/south-africa-construction-market-analysis/#:~:text=The%20South%20Africa%20construction%20market,%2C%20industrial%2C%20and%20housing%20projects.

approximately $464 million in employment, taxes, and inward investment between 2016 and 2017 (PwC, 2018). In fact, the audiovisual and interactive media segment of the CCIs in South Africa accounted for 11% of CCIs' contributions to GDP, boasting the highest growth rate of all subsectors at 5.9% per annum (SACO, 2020b).

Nigeria

As with South Africa, the CCIs in Nigeria have expanded exponentially with the extensive and rapid growth of the mobile and internet access across the country. It has provided an opportunity to many sectors within the CCIs to reach consumers that historically had been unreachable. While this has had an obvious impact on the E&M sector—with more consumers able to access streaming capabilities for media consumption (Oyedokun and Oladesu, 2022)—it has also provided opportunities for Nigeria's fashion industry, which has become more accessible with e-payments (Josephine et al., 2024).

Fashion represents an important portion of the CCIs in Nigeria. Nigerian fashion has been gaining international recognition in recent years, especially after high-profile figures like Michelle Obama and Lupita Nyong'o have chosen to wear and promote Nigerian fashion designers (Ndukwe 2020). Estimates from Nigeria's Minister of Information and Culture indicated that the Nigerian fashion industry was worth $5 billion as of 2020, encompassing around 1,000 businesses that employed over 30,000 individuals (APA, 2020). These statistics do not include the economic impact of the substantial number of informal sector businesses tied to the fashion industry. Overall, the textile, apparel, and footwear sectors have seen an average growth of 17% since 2010, with events like Lagos Fashion Week helping to attract international attention and drive demand (Akinsola, 2019). At the same time, there are significant opportunities to grow the influence and profitability of the sector, as Nigeria still does not rank in the top ten apparel exporters in sub-Saharan Africa (AfDB, n.d.b.). While Nigeria was home to the largest textile industry in the 1970s and 1980s, most of these firms have since closed, creating a dependence on imported fabrics and hindering sector growth (Isaac 2019). Ramping up textile production through investments in Nigeria will help to address this barrier to growth in the fashion industry and present an opportunity for investors to achieve significant returns.

Infrastructure in Nigeria's film industry is another opportunity for investors and companies looking to expand in an already growing market. Per 2021 estimates, Africa had only 1,653 cinema screens, which translates to one screen per 781,402 people, indicating the immense opportunity to enter this market or expand existing firms in the physical media sector (Esther 2023). As of 2022, Nigeria offered only 81 movie theaters with roughly 300 total screens in a country of over 200 million people (Leadership News 2024). The country must update its physical viewing infrastructure to keep up with demand. Nollywood, for example, will continue growing as its films become more popular on the international stage. The 2016 release of "The Wedding Party" was noted for its success, even grossing a record $11.5 million domestically during an economic downturn (Vourlias 2017). In February 2020, Netflix created 'Netflix Naija,' the presence of which serves to increase global awareness of African films and, crucially, lessens the negative effects of movie piracy in Nigeria as producers are more likely to release their films through Netflix, where protections make it almost impossible to pirate them (Iwuh et al., 2023).

Films and broadband access growth are also indicators of the potential within the gaming industry, as many video games are created based on pre-existing cultural media and entertainment products. Nigeria's video game market is already sizeable and was poised to reach a value of $483 million in 2023, with social/casual gaming being the largest and most important sector (Ayo-Odewale 2022). These industries hold enormous opportunities for employment generation, revenue growth, and general success compared to countries with less established video producing and distributing sectors. But uncoordinated value chains, underinvestment, antiquated rules, and lax enforcement of intellectual property laws can hinder progress toward necessary funding. In May 2019, the Banker's Committee and the Central Bank of Nigeria collaborated to offer N22 billion to investors and entrepreneurs in the IT and creative industries (Koigi, 2021). This is one example of ways that different entities can invest in Nigeria's CCIs for continued growth.

CHALLENGES AND RISKS: LIMITED INTELLECTUAL PROPERTY (IP) RIGHTS AND PIRACY

Research has shown that copyright protections are a necessary ingredient to foster viable growth in CCI sectors like music in developing countries (Andersen et al., 2000). However, recent bills have raised questions over the security of intellectual property rights on the African continent. As of January 2025, given South Africa's growing IP risks, the International Intellectual Property Alliance (IIPA) recommended adding the country to the "Priority Watch List," while Nigeria and Morocco were added to the "Watch List" (IIPA, 2025).

Across the CCIs in Africa, piracy and copyright infringements represent a significant threat, but there are a lack of institutions and procedures to address this issue. One of the primary challenges facing music streaming start-ups in Africa is piracy, as their music catalogue often becomes a prime target for pirates (WT Research 2020). While Nollywood is a driver of the Nigerian economy and employment, its impact is severely limited by piracy as well. Following its release, a new Nollywood film automatically hits a so-called "revenue ceiling" when pirated copies begin to circulate, which often occurs within a few days following its official release (Paulson, 2012). In fact, UNESCO estimates that 50% to 75% of movie revenues from African producers are lost to piracy (TRT Afrika 2024; Moudio 2013). Piracy also impacts the publishing industry, with writers less motivated to write when the royalties they see are lessened by sales of pirated copies. It is estimated that Nigerian publishers lose over 40% of their revenues to pirated sales (Tagholm 2019).

STRATEGIES AND RISK MANAGEMENT

The CCIs in Africa represent a significant opportunity for governments and businesses alike to drive socioeconomic development and high returns, and there are strategies that can be put into place to mitigate the current barriers to growth and risks in the sector.

Embrace online channels

To address the effects of pandemics and similar shocks going forward, African businesses need to invest in building up their online capabilities to be able to flexibly reach consumers through a plethora of different sales channels. This will ensure steady revenue streams even when consumers cannot access creative economy products and services in person. Likewise, online channels can augment sales by providing consumers with another avenue to purchase products even when in-person options are available.

During the COVID-19 pandemic, many sectors of the CCIs utilized online channels. For instance, the Nigerian apparel and footwear market saw a negative impact on sales due to distribution challenges during lockdowns. In response to the challenge, retailers shifted to e-commerce channels, innovatively using third-party sites to reach consumers (Euromonitor International 2021). In the visual arts sector, the Circle Art Gallery set a record in October 2020 after holding Kenya's first online art auction, achieving a 90% sell-out rate to raise over $128,000 in sales and providing relief to this struggling sector (Mutu 2020). As Africa continues to rebound from the pandemic, the rising influence of online sales channels is expected to continue, further necessitating a strong response by businesses in the CCIs. In South Africa, a survey by Deloitte found that two in three respondents planned to shop more online in 2021, with fashion being one of the most popular products for online purchases (Schaefer and Bulbulia 2021). As a result, investing in online channels is necessary not only to address the risks associated with global shocks, but also to address changing consumer purchasing habits.

Improve policy and IP protections

African governments need to take action to cultivate a business environment that encourages the development of and investment in the CCIs. The lack of policy coherence in the music industry is a barrier to unlocking its potential to accelerate the continent's economic development (Solutions for Youth Employment, 2021). Previous research has found that while there are policies in place in sub-Saharan Africa to protect intellectual property, they are ineffectual, with many innovators not using IP protection because they are not aware of their existence or because enforcement is inadequate (Sonobe et al., 2022). The African Union's revised Plan of Action on Cultural and Creative Industries includes a focus on protecting IP rights, and this is a step in the right direction (AU, 2021a). However, individual African countries need to strengthen the institutions in place that enforce IP law and combat piracy, along with codifying clear IP guidelines into law that creators can understand and easily use (Sonobe et al., 2022).

Aside from strengthening IP protections, African governments need to devote more funding to building the infrastructure needed to support the CCIs. Considering the fact that many governments do not allocate even 1% of their annual budgets to the CCIs, there needs to be a reevaluation of budgetary priorities to support the CCIs, which play a vital role in promoting job creation and socioeconomic development (AU, 2021b). Additionally, governments need to institute business-friendly policies and regulations that promote innovation and development and consider the needs of entrepreneurs, investors, and other stakeholders (Wolken 2020).

LOOKING TO THE FUTURE

The renaissance of the CCIs in Africa can only continue presenting opportunities to businesses, governments, and private citizens alike. By 2030, Africa's growing consumer market will reach over 1.7 billion consumers with a pocketbook of $2.5 trillion (WEF, 2017a). This burgeoning consumer market is increasingly demanding creative economy products, especially as infrastructure improvements allow them to access the CCIs via diverse channels. Afreximbank, the African Export-Import Bank, established a $500 million loan facility for African cultural and creative items in January 2020 (Afreximbank, 2020). As technology adoption accelerates on the continent, the CCIs will be transformed, with new industries coming into the forefront—and on- and off-continent investment will be crucial to their growth.

If governments and businesses take action to support the CCIs in Africa, their growth has the potential to support wide-reaching, equitable socioeconomic development on the continent. The examples of South Africa and Nigeria, which are leading the way in CCIs on the continent, provide powerful illustrations of the sector's unique contribution to growing and diversifying the economy and offer valuable strategies for success to other African nations. Since the CCIs tend to employ more youth and women than other sectors, the CCIs can promote equality and the creation of quality jobs for Africa's growing young workforce (EY, 2015). Likewise, developing the CCIs can have spillover effects that benefit other areas of the economy, especially the secondary sector (Department of Trade and Industry and Invest South Africa, 2020). While there are challenges and risks that represent barriers to growth, there are strategies businesses and policymakers can use to overcome these challenges, including diversifying the ways businesses reach consumers via online channels and improving the business environment for CCI companies. Ultimately, if leveraged correctly, the CCIs represent an opportunity for businesses, governments, and consumers alike to promote development and reap significant benefits from the expansion of the creative economy on the African continent.

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