



CULTURAL AND CREATIVE INDUSTRIES

A supra-regional project implemented by GIZ and Goethe-Institut

Tracer Study 04/2022

Published by:

giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH



Summary

Within the project Cultural and Creative Industries (CCI), 2423 creative professionals, 917 (38%) of them women, were trained between January 2019 and March 2022. Participants of the training responded to a survey designed to measure the impact of the training on employment and income.

Impact on employment and income

- 83% of the respondents have reported improved entrepreneurial and creative competence.
- 50% of the respondents have established new marketing or sales channels.
- 66% of the respondents, of whom 35% were women, confirmed that either their employment and income situation has improved or that they feel their prospects for employment and income have improved.

Building resilience

- Creatives were substantially affected by Covid-19 restrictions.
- 85% of the respondents confirmed that they have gained resilience skills.
- 70% of the respondents, of whom 46% were women, confirmed that they were able to either maintain or expand their business.
- The trainings that were combined with stipends proved to be very successful.

A strengthened ecosystem

- The project aims to support organisations in establishing services for creatives.
- 83% of creative professionals, of whom 37% were women, stated that services offered by cultural and creative organisations had either improved or greatly improved.

A gender lens on employment promotion

- On average, women indicated similar values in terms of initiating self-employment and receiving higher income, however fewer women started a new job within the cultural and creative industries.
- Women perceive themselves on average to be slightly less *employable* than male creatives (according to the Great Eight Competencies Model - see [page 6](#)).

Employment – baseline data

- Out of the respondents 36% are self-employed and freelancers, while 19% are formally employed.
- 47% of creatives spend more than 20 hours a week on cultural and creative work.
40% of creatives earn less than the national minimum wage from their engagement in cultural and creative work.



EQUALITY COMMUNITY

INTRODUCTION

Cultural and Creative Industries (CCIs) have demonstrated the potential to make a significant contribution of the Sustainable Development Goals (SDGs). They stimulate innovation that can drive inclusive sustainable growth.

The cultural and creative industries are among the most rapidly growing economic sectors. They generate almost 50 million jobs worldwide and offer employment for women and youth^[1]. A high amount of digitalisation and the adaptation of emerging technologies promise future work opportunities and facilitate the spill over of innovation to other sectors. Apart from their economic value, CCIs create identity, bring people into dialogue, and contribute to democracy.

To nurture this potential, the Federal Ministry for Economic Cooperation and Development (BMZ) launched a supra-regional project that focuses on cultural and creative work as a vehicle for sustainable development. Aiming to improve income and employment opportunities for creative professionals, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and the Goethe-Institut jointly implement the CCI project in six partner countries: Kenya, Senegal, South Africa, Jordan, Lebanon, and Iraq. Activities focus on the the following subsectors; design, music, animation, and fashion. In addition to promoting the development of entrepreneurial, digital, and creative skills through training, the project aims to strengthen the framework conditions and the CCI ecosystem.

In future the project will concentrate even more on strengthening diversity in creative teams, especially in digital creative industries. The project works towards gender equality and inclusion in the CCIs and by doing so female and LGBTQ+ creatives can evolve further in their role as civil society reformers.

In April 2022, the project evaluated the first results of previous activities in the partner countries. A second and third study will be conducted both during and towards the end of the project.

»If well-nurtured, the creative economy can be a source of structural economic transformation, socioeconomic progress, job creation and innovation while contributing to social inclusion and sustainable human development.«

Abdulla Shahid

President of 76th United Nations General Assembly

^[1] According to the UNESCO study "Cultural And Creative Industries in the face of COVID-19: an economic impact outlook", the CCIs generate at least 48.4 million full-time equivalent jobs.

WE

POPULATION AND STUDY SAMPLE

A study on the project's impact to date, known as a tracer study, received **494 responses** in total, **38 % of whom were women** and **17 % of whom were youth (<24 years)**.

The respondents included 116 staff members of CCI organisations and 378 creatives who participated in training between January 2019 and March 2022.

The study illustrates that creatives usually work in multiple and very diverse creative disciplines.

494 responses

66 % confirmed that their employment and income situation had improved

IMPACT ON EMPLOYMENT AND INCOME

The study first examined the current employment and income status of creatives, which serves as a baseline for future studies. Results show:

- **36 %** of the creatives are self-employed/freelancers
- **19 %** are formally employed
- **47 %** of creatives spend more than 20 hours a week on cultural and creative work
- **40 %** of creatives earn less than the national minimum wage from their engagement in cultural and creative work

The study examined in detail the impact of the project's activities (January 2019 - March 2022) on the creatives' employment and income situation and prospects. The results show that 66.1 % of the respondents, of whom 35.3 % were women, confirmed that overall their employment and income situation has already improved (in times of Covid-19) and furthermore, that their prospects of income and employment have improved.

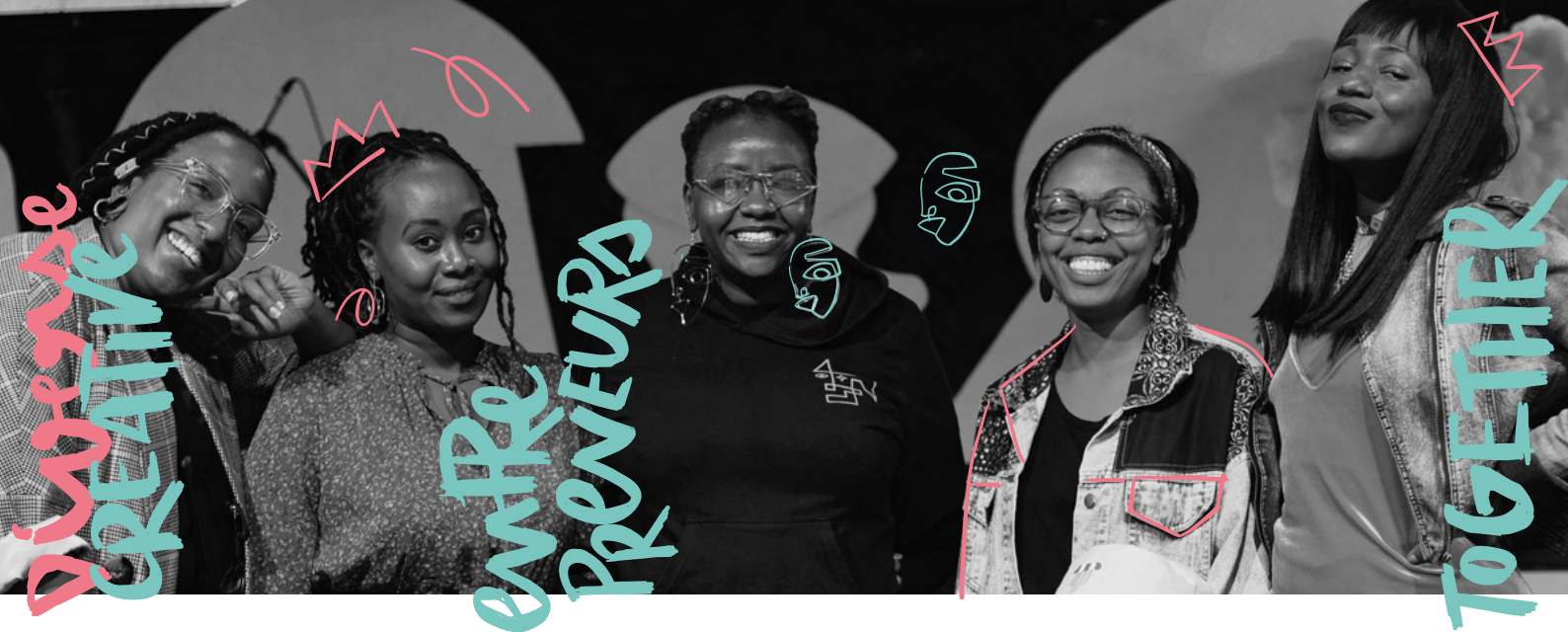
- In total, **19 %** had found a new job
- **36 %** confirmed that they had become self employed
- **26 %** reported a higher income
- **83 %** of respondents reported that they have improved their employability and gained relevant competence
- Additionally, **50 %** established new marketing or sales channels as a result of the project

The study also identified change stories, that confirm the improvements in employment and income situation and prospects for the creatives.



»The project helped me to meet more creatives and enabled exchange of ideas and external partnerships thereby improving my income through projects and partnership.«

Creative, Kenya



Employment and income potential has been affected by external circumstances. Firstly, the study illustrates that employment potential increases with time. The data suggests that greatest impact occurs 2-3 years after completion of training. Secondly, the pandemic and governmental restrictions (lock-downs) had an impact on the target group.

- 78% of creatives confirmed loss of income during the Covid-19 pandemic.
- 43% of these creatives confirmed that the loss had been more than 50% of their original income.

Figure 1 demonstrates the impact of the Covid-19 pandemic on creatives' employment and income situation.

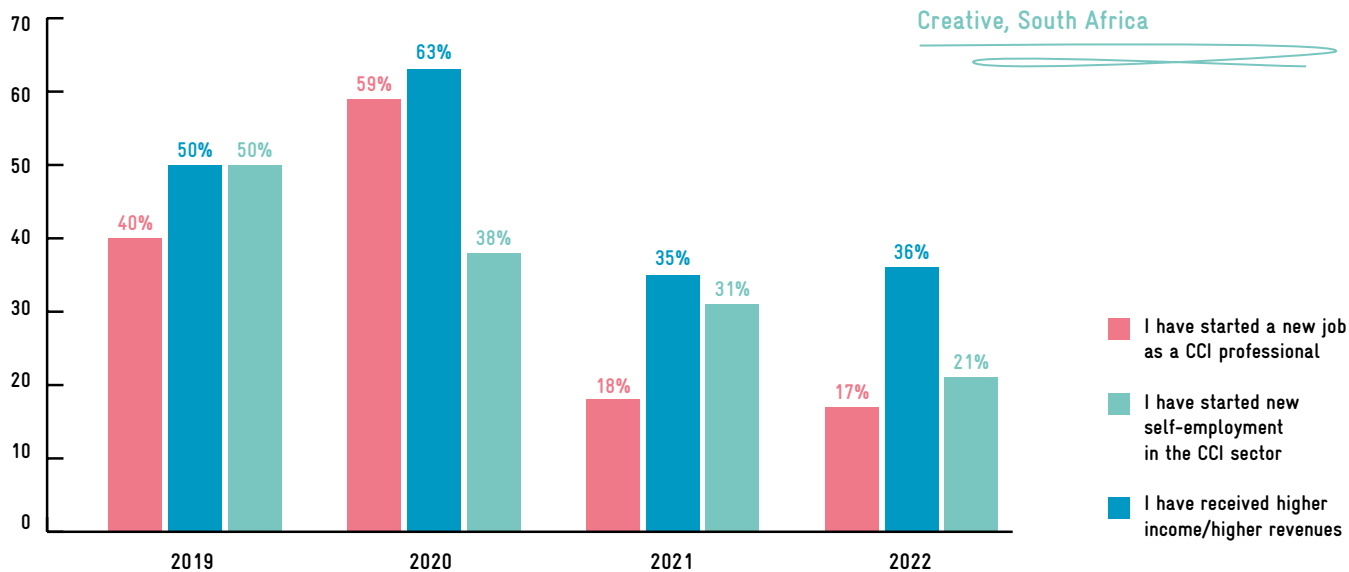
To conclude, evidence shows that the project directly contributed to SDG 8 (employment and economic growth) while taking into consideration gender equality. The project also contributed to SDG 4 (inclusive and equitable quality education). Indeed, on average women indicated similar values in terms of initiating self employment and receiving higher income, but fewer women started a new job as a creative professional. This deviation might be caused by personal circumstances and different employability preconditions (see below).

Figure 1

Employment and income situation of creatives per year

»We got more clients due to the skills I got from the project, we now receive more bookings than before.«

Creative, South Africa



PRECONDITIONS FOR IMPACTING EMPLOYMENT AND INCOME

The study identified additional preconditions that, according to the project's internally developed Theory of Change, should contribute to impact in terms of income and employment. It was revealed that the majority of creatives perceived improvements in business modelling and revenue planning (63%), visibility (66%), effective partnerships (67%), and in the development of new project ideas (76%). Calculations show that these preconditions are positively correlated with the desired outcome (e.g. improved income).

However, external factors influenced the actual achievement. Ability to access new markets could only be confirmed by 50% and access to new financing opportunities by 29% of the creatives. This illustrates that the sector needs more accessible market and funding opportunities.

FEEDBACK ON EMPLOYABILITY

Following a theory-based approach, the tracer study applied the Great Eight Competencies Model (based on Bartram, 2005) to measure employability. In the given model, employability and job performance are determined by eight broad competency factors. The competencies are defined as behaviours that a person engages in to achieve specific career goals.

The creatives were asked to assess their own competencies. The average values plausibly suggest that employability is generally rated as high, but on average women perceive themselves as slightly less employable. The difference between men and women in perceived competencies include "Interacting and Presenting" and "Adapting and Coping". The project could actively address this in future.

Also, to further enhance employability, results suggest that activities should focus on "Leading and Deciding" competencies.

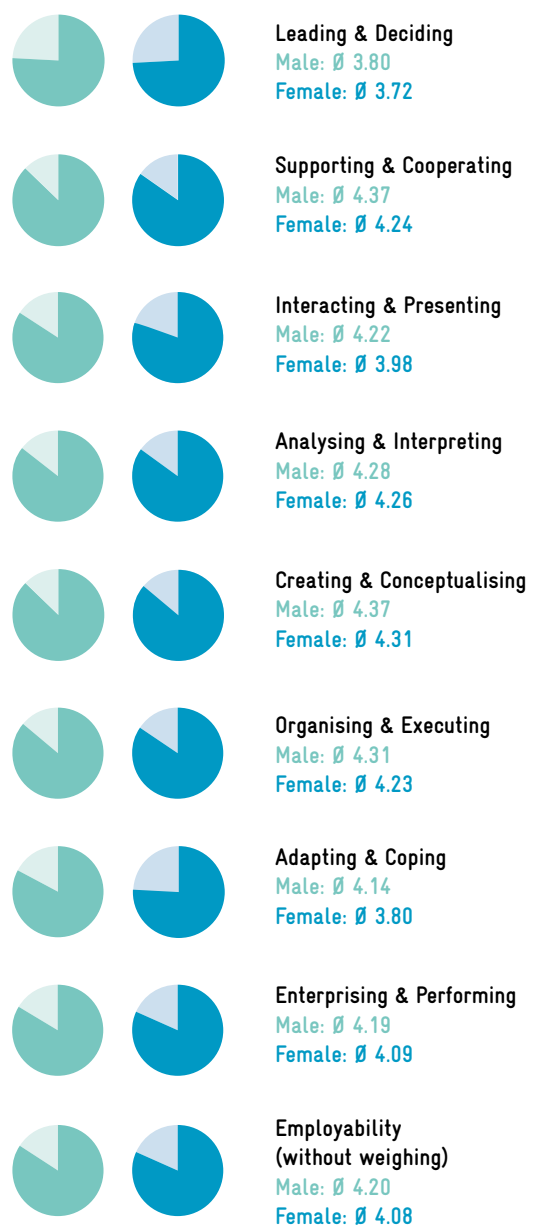
While employability appears to be high, more structured support from the ecosystem and access to finance are needed to enable improved employment and income opportunities for creatives.

Focus group discussions with creatives pointed out the need for dialogue between government and creatives, in order to establish more effective government policies and additional sponsorship opportunities.

THE EIGHT COMPETENCY FACTORS

Employability and job performance are determined by eight broad competency factors. The model defines competencies as behaviours that a person engages in to achieve specific career goals. The perception is rated on a scale from 1 to 5 (with 5 indicating the highest value).

Figure 2
Creatives' self assessment of employability; perception rating on a scale from 1 to 5 (with 5 indicating the highest value). Each pie chart indicates the average value from the assessment.



TRAINING EFFECTIVENESS

Considering the project’s strong capacity building approach, the study also included questions on the effectiveness of training. The assessment was based on the Kirkpatrick Model (1995) which assesses both formal and informal training methods and rates them against four levels: reaction, learning, behaviour, and results.

Overall, the study results show an exceedingly positive reaction towards the training offerings and participants’ learning experiences. The participants find the training relevant and effective throughout the years and across the countries. Data shows that entrepreneurial and creative skills training are a strength of the project. Participants show highest perceived learning in creative skills (i.e. ideation, producing) followed by resilience skills (i.e. adaptation of business models, online-distribution channels).

The perceived learning of digital skills was highest during the pandemic (2020). Most respondents also indicate that they can make use of the skills they acquired.

Furthermore, they would recommend the training to other creatives. However, one-fifth of the respondents indicated that their personal situation (not further defined) can still represent a barrier in case of application of learnings.

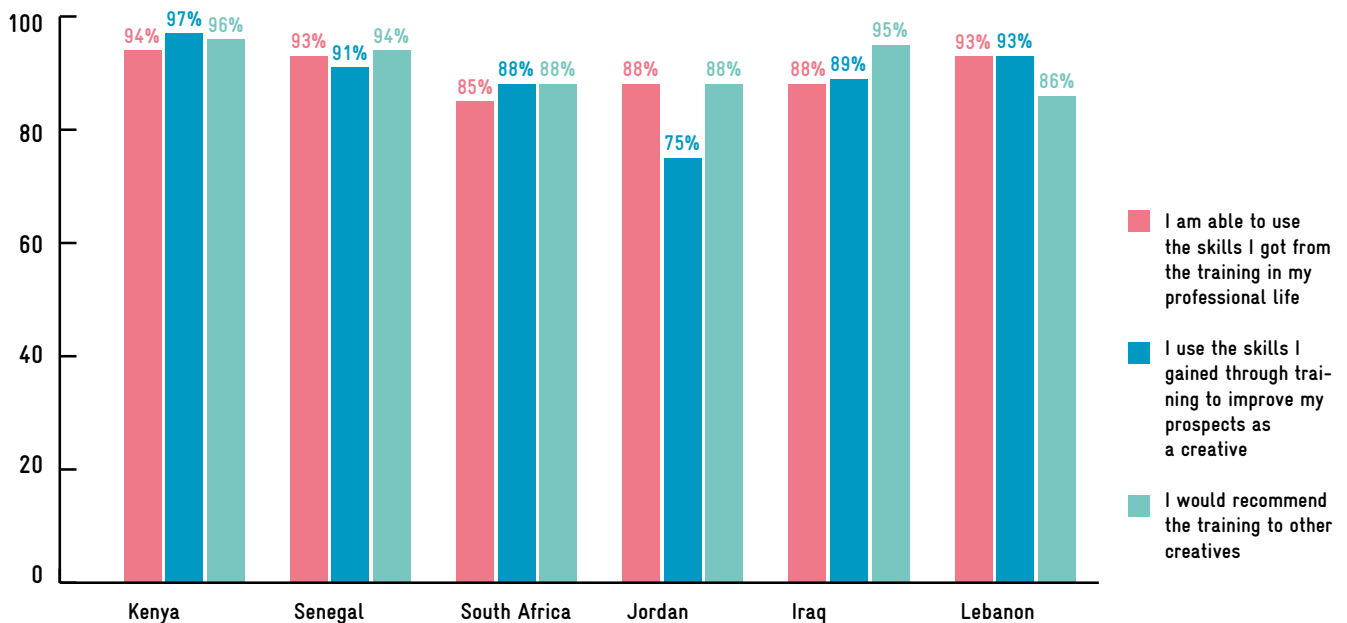
The qualitative data analysis equally shows a very positive reaction towards training offered by the project. 56% of creatives indicated *improved learning* and *upgrading of skills* as the most significant change they perceived, while the remaining creatives named *networking with other creatives* and *improved employment prospects* as most positive impacts of the project.

»The project has transformed how I use digital media and has enabled me to package my work and market it better to new audiences online.«

Creative, Kenya

Figure 3

Kirkpatrick results/behaviour across countries



IMPACT IN THE CCI ECOSYSTEM

Apart from understanding the impact on the creatives, the tracer study was also interested in understanding the extent to which CCI organisations and the ecosystem have changed. 83% of creatives, of whom 37% were women, stated that the services offered by cultural and creative organisations had either improved or greatly improved.

Additionally, the partner organisations of the project indicated that the greatest improvement they made was in terms of training and content offerings, cooperation management and digital services. This was confirmed by the creatives, who highly valued improvement in the services of CCI organisations with respect to strengthening entrepreneurial capacities, building

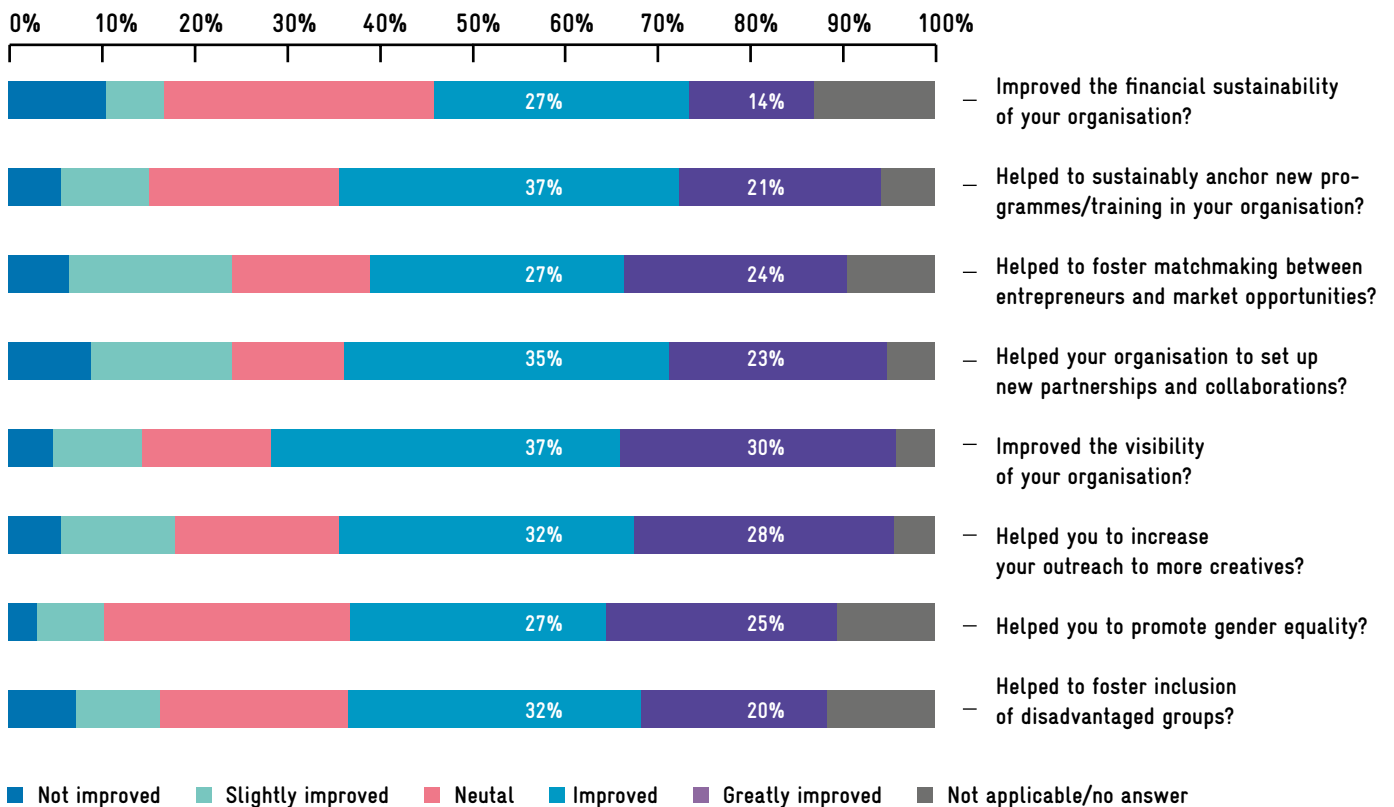
national networks and improving visibility of CCI.

The results of the study suggest that the services offered generally meet the needs of the identified creatives, especially when it comes to further qualification and cooperation management within the sector.

At the same time, room for improvement was identified when matching entrepreneurs with market opportunities, as well as tailoring inclusive offers for women and other disadvantaged groups. An improvement of these services would allow creatives to utilise their learnings and overcome existing market challenges and social barriers.

Figure 4

Extent to which newly developed services supported organisations (answered by staff members of the organisations)



BUILDING RESILIENCE IN RESPONSE TO THE COVID-19 PANDEMIC

The results on resilience of creatives show that both men and women seem to be similarly affected by the Covid-19 pandemic, with 43 % of female creatives and 41 % of male creatives confirming a more than 50 % loss of original income. Creatives in the focus countries were highly affected by the Covid-19 pandemic but became resilient in times of crisis due to the activities offered by the project. The study results show a largely positive impact of the project on the creatives' resilience with 85.1 % of creatives confirming to have gained resilience skills.

The resilience support provided by the project helped creatives in their professional work in the following ways:

- **70 % of creatives, of whom 46 % were women, confirmed that they were able to either maintain or expand their business during the pandemic,**
- **54 % confirmed to have digitalised their products and services, and**
- **41 % have bought new equipment with the help of the project.**

According to interviews and discussions conducted, in-cash support and the facilitation to digitalise products and services were perceived as helpful and effective.

CCI organisations were equally affected by the Covid-19 pandemic and struggled to continue their operations. Thus, the project made funding available to support organisations in continuing their activities and adapting their services to match the change in circumstances. 34 % of the organisations' representatives confirmed that services were expanded and 44 % confirmed that services were maintained as a result of the resilience measures.

»The project helped transforming the physical networking components into an online platform which has the potential to become a virtual hub for animators.«

Staff Member, Lebanon



CONCLUSION

CONCLUSION

The study findings allow for an optimistic outlook on the impact on income and employment in the CCIs since creatives have developed strategies to adapt to the pandemic and certain pre-conditions, such as employability, are rated exceptionally high.

The training offered by the project was found to be effective and greatly appreciated, especially in terms of the contribution to enhancing digital, entrepreneurial, and creative skills. Furthermore, the study clearly showed that resilience measures mitigated the effects of the pandemic. Also, services provided by partner organisations are well received by the creatives.

Yet, framework conditions are shown to hamper progress towards the full potential of an improved income and employment situation. To derive benefit from the creatives' high potential and skills the sector needs to support access to new markets and new sales channels, offer trainings on relevant digital skills, provide funding opportunities and financial stability for both creatives and organisations to a greater extent.

To promote gender equality, a focus on female creatives should be taken up and mainstreamed throughout the activities. As a first step it is recommended to better understand the needs of women. According to the study, training for women can benefit from specific *adapting and coping* and *pitching* sessions for women.

Finally, results highlight the need to further work on organisational resilience and, above all, financial sustainability. By doing so, organisations can fulfil their role in providing an important support system for creatives so that they can realise their potential.



WOMEN
Sisters
STARTUPS

RECOMMENDATIONS

Training

- Maintain the quality and focus of the training on entrepreneurial, creative, and digital skills.
- Provide access to markets (B2B/B2C) as the findings indicate a strong positive correlation between employment and income effects and market access.
- Ensure that women and youth are specifically targeted in upcoming activities by providing gender-responsive and gender-transformative trainings. This could entail additional training on soft-skills such as adapting and coping skills, pitching sessions for women, matchmaking, peer-learning, and safe spaces.
- Provide certificates or reference letters as a formal confirmation of attendance. This is a formal proof of experience and often an effective tool when searching for employment.

Ecosystem Support

- Institutionalise the training and curricula that have been developed.
- Integrate gender-responsive and gender-transformative services.
- Promote access to funding which considers intersectionality and is sufficiently flexible to accommodate local circumstances.
- Provide access to markets for multipliers and organisations in the CCLs.
- Find solutions for financially sustainable organisational models.
- Promote fair working conditions and the protection of intellectual property.
- Facilitate exchange on a political level to advocate the CCLs.
- Identify funding opportunities.

Further Research

- Conduct qualitative research on *personal circumstances* that hinder creatives in improving their income and employment situation.
- Conduct qualitative research on barriers preventing women and marginalised groups from taking part in training.

CREATIVITY

Published by:
Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
Registered offices: Bonn and Eschborn, Germany

Friedrich-Ebert-Allee 32+36
53113 Bonn, Germany

T +49 61 96 79-0
E kultur-und-kreativwirtschaft@giz.de
I Kultur- und Kreativwirtschaft als Entwicklungsmotor (www.giz.de)

Project:
Cultural and Creative Industries
implemented by GIZ and Goethe-Institut

Responsible: Angelika Frei-Oldenburg

Design and Layout: TINKERBELLE GmbH, Berlin

Photo credits:
Page 1, 3, 4, 5, 10: Goethe-Institut/PerForm Music Incubator
Page 2: Africa Digital Media Institute
Page 9: GIZ/Turquoise Mountain
Page 11: Egsina

Bonn, 2023

Implemented by

giz Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH



On behalf of



Federal Ministry
for Economic Cooperation
and Development