The Economic Contribution of the Cultural and Creative Industries (CCIs) to Gross Domestic Product (GDP), Employment, and Informal Sector Dynamics in Zimbabwe - CfCA Study Report

© simbarashe mudhokwani

CONNECT FOR CULTURE AFRICA

SELAM

Published in 2026 by Selam
Mäster Mikaels gata 2, 116 20 Stockholm, Sweden

Consulting Team: Florence Majachani
Farai Mpfunya
Simbarashe Mudhokwani
Clapton Munongerwa
Tendai Maparara
Graphic design: Tewodros Amsalu

CONNECT FOR CULTURE AFRICA

The Economic Contribution of the Cultural and Creative Industries (CCIs) to Gross Domestic Product (GDP), Employment, and Informal Sector Dynamics in Zimbabwe - CfCA Study Report

Consulting Team:
Florence Majachani
Farai Mpfunya
Simbarashe Mudhokwani
Clapton Munongerwa
Tendai Maparara

June, 2026

implemented by: SELAM

in partnership with: African Union, National Arts Council Zimbabwe, Chenhaka Trust

supported by: Sweden Sverige

TABLE OF CONTENTS

TABLE OF CONTENTS 4
ACRONYMS AND ABBREVIATIONS 6
EXECUTIVE SUMMARY 8
1. INTRODUCTION 10
1.1. Context 10
1.2 Purpose and Objectives of the study 10
2. Literature Review 11
2.1 Measuring the Impact of Cultural and Creative Industries 11
2.2 Informality in the CCIs 11
2.3 Drivers of informality in the Cultural and Creative Industries 12
2.4 Contribution of the Informal CCI Sector 12
2.5 Policies Governing the CCIs in Zimbabwe 13
2.5.1 Continental and Regional Policy Frameworks 13
2.5.2 National Policy and Legal Frameworks 14
3. RESEARCH METHODOLOGY 16
3.1 Scope 16
3.2 Study Design 16
3.3 Conceptual Framework 16
3.4 Analysis of non-monetised activities 17
3.5 Data Collection 17
3.5.1 Qualitative Research Methods 17
3.5.2 Quantitative Methods 18
3.5.3 Sampling 18
3.5.4 Macroeconomic Modelling 19
3.6 Limitations 19
3.7 Data Confidentiality, Integrity and Security 19
4. ESTIMATING THE ECONOMIC CONTRIBUTION OF CCIs 21
4.1 Contribution to Employment 21
4.2 Informality in CCIs Employment 23
4.2.1 Employment Status 23
4.2.2 Main Source of Income for CCIs Workers 23
4.2.3 Working hours 24
4.2.4 Cultural and non-cultural jobs 24

4.2.5 Place of operation **25**

4.2.6 Limited Access to Social Protection **25**

4.3 Contribution to Trade **25**

4.3.1 Trade Performance **25**

4.3.2 Export Market Opportunities **28**

4.3.3 Impact of Trade Barriers **28**

4.3.4 Trade in CCIs Goods **29**

4.3.5 Trade in CCIs Services **29**

4.4 Contribution to National Gross Domestic Product (GDP) **30**

5. CONTRIBUTION OF THE INFORMAL CCIs 34

6. KEY CHALLENGES AND OPPORTUNITIES FOR INFORMAL CCIs 35

7. SKILLS AND TRAINING IN THE CCIs 37

8. CONCLUSIONS AND RECOMMENDATIONS 39

8.1 Conclusions **39**

8.2 Recommendations **40**

9. REFERENCES 43

ACRONYMS AND ABBREVIATIONS

AACC	African Audio-Visual and Cinema Commission
AfCFTA	African Continental Free Trade Area
AI	Artificial Intelligence
AR	Augmented Reality
AU	African Union
CCIs	Cultural and Creative Industries
CMO	Collective Management Society
FCS	Framework for Cultural Statistics
FGD	Focus Group Discussion
GDP	Gross Domestic Product
HS	Harmonised System
ICLS	International Conference of Labour Statisticians
ICSE	International Classification of Status in Employment
ICT	Information and Communication Technologies
IFCD	International Fund for Cultural Diversity
ILO	International Labour Organisation
IP	Intellectual Property
ISIC	International Standard Industrial Classification of All Economic Activities
KII	Key Informant Interview
NACZ	National Arts Council of Zimbabwe
NGO	Non-Governmental Organisation
NDS	National Development Strategy
SADC	Southern African Development Community
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
USA	United States of America
VR	Virtual Reality
XR	Extended Reality
ZimStat	Zimbabwe Statistics Agency
ZIMRA	Zimbabwe Revenue Authority

EXECUTIVE SUMMARY

This strategic research has been carried out to generate robust, evidence-based insights on the current and potential role of Cultural and Creative Industries (CCIs) in driving economic growth, job creation, innovation, and inclusive development in Zimbabwe. Globally, the world has witnessed an increase in the contribution of CCIs to employment generation, Gross Domestic Product (GDP), global trade, and social impacts. The study examines the contribution of CCIs to Zimbabwe's GDP and employment. The study utilized a mixed-method strategy that combined both qualitative and quantitative research techniques. Quantitative data was used to assess the contribution of CCIs, focusing on economic variables such as GDP contribution and employment figures. Qualitative data gathered through desk reviews, case studies, focus group discussions, and key informant interviews helped contextualize the findings and provide explanations for the quantitative results. By integrating quantitative measures of economic contribution with qualitative insights from stakeholders, the analysis offered a nuanced, validated, and policy-relevant understanding of how CCIs influence Zimbabwe's economy, employment, and informal sector dynamics. This approach leveraged the strengths of both data types to produce a richer and more comprehensive analysis.

The research employed purposive sampling, selecting individuals for key informant interviews and Focus Group Discussions (FGDs) based on their specific knowledge and cultural domains. This approach was combined with snowball sampling, where key informants referred the research team to other suitable participants, enabling access to hidden populations, particularly in rural areas. Data for the survey was collected using the Kobo toolbox. Macroeconomic modelling was applied to estimate the contribution of creative and cultural industries (CCIs) to output and Gross Domestic Product (GDP). The analysis adopted a pragmatic, multidimensional framework combining value-added decomposition, employment elasticity analysis, and multiplier-based interpretation informed by input–output relationships as reflected in official national accounts. Descriptive statistics were used to analyse the survey data.

Secondary data from the Zimbabwe National Statistics Agency (ZIMSTAT) and other Government Ministries, Departments and Agencies (MDAs) were used to estimate the contribution of the Cultural and Creative Industries (CCIs) to the Zimbabwean economy. The analysis disaggregated CCI domains in line with the UNESCO cultural classification framework. However, the available national datasets were primarily compiled using the International Standard Industrial Classification of All Economic Activities (ISIC), Revision 4. In addition, data on international trade in CCI-related goods was classified according to the Harmonised System (HS) coding structure.

Findings show that CCIs contributed approximately 5.9% of GDP in 2024, with television broadcasting and book publishing as leading domains. Employment in CCIs accounted for 0.7% of national employment, dominated by design-oriented activities such as fashion, graphic design and photography. However, the sector is highly informal, with most workers self-employed, operating from home and lacking access to finance, infrastructure and social protection. Women and youth, particularly in rural areas, rely heavily on CCIs for livelihoods. Survey findings revealed a highly fragmented and multi-job employment pattern typical of the Cultural and Creative Industries (CCI), where only a small proportion of workers rely on a single stable job.

Trade analysis revealed that CCIs goods represented 0.22% of imports and 0.14% of exports, with South Africa serving as both a key market and a transit hub. Opportunities exist in regional and global markets, but barriers such as weak digital infrastructure, visa restrictions and limited funding constrain growth. Services trade, particularly music, festivals and digital platforms, is significant but under-monetized.

Key challenges include fragmented regulation, limited access to finance, weak infrastructure, high licensing fees and skills gaps. Enablers include Zimbabwe's rich cultural heritage, growing digital platforms, abundant talent and international recognition of visual arts. The study highlights the need for streamlined regulatory frameworks, improved access to finance and infrastructure, enhanced skills development and targeted support for formalization and international market access. The study proposed some of the following recommendations:

The government should consider streamlining licensing processes in the CCIs aiming to reduce red tape and lower regularisation costs to promote formalisation.

National Accounts produced and published by ZimStats should provide detailed data for CCIs using the definitions and statistics frameworks for CCIs such as the UNESCO Framework for Cultural Statistics (2009 recently updated at the end of 2025) or a localised definition and framework.

The government should engage in bilateral negotiations for ease of visa restrictions with African countries and countries in other continents to enable mobility of Zimbabwean artists.

The government should strengthen enforcement of copyright laws including recognition of related rights and collection of royalties in the digital space.

The government should extend social protection to CCIs workers, coverage of CCIs workers by labour laws and create platforms to enhance social dialogue within the CCIs

Copyright Management Organizations (CMOs) should have reciprocal agreements in the SADC region and AfCFTA so that royalties can be collected and paid out to the owners.

The government should consider investing in diverse pathways to unlock market access including strengthening the CCIs distribution ecosystem linked to other sectors of the economy such as tourism; digital promotion of Zimbabwean CCIs, investing in CCIs distribution infrastructure as well as facilitating regional and international collaborations.

CCIs businesses should conduct research to understand the CCIs market paying close attention to statistics on consumption patterns, the preferred content and spending capacity/buying power, and how CCIs markets can be reached. This will inform marketing strategies that effectively tap into the local, African and global markets.

CCIs practitioners should strengthen collaborations with like-minded institutions, the diaspora, private sector allies and investors to improve access to global platforms for content distribution while nurturing the invaluable opportunities for content distribution within Zimbabwe such as schools.

The government should create an enabling environment for CCIs through effective IP protection and monetisation mechanisms, public funding as well as provision of fit-for-purpose infrastructure.

The government should project skills needs within the CCE sector to effectively plan and address present and future skill gaps

The government should enable policy coordination and harmonized governance of CCIs across different ministries under which CCIs fall such as education, tourism, information and communication technologies, small to medium enterprises and unlock investment opportunities within CCIs by promoting participation of the private sector.

1. INTRODUCTION

1.1. Context

This strategic research has been carried out with the aim of generating robust, evidence-based insights on the current and potential role of Cultural and Creative Industries (CCIs) in driving economic growth, job creation, innovation, and inclusive development in Zimbabwe. The study aims to generate policy-relevant evidence to guide strategic investment and policy interventions in the CCIs.

The study comes at a time when there has been an unprecedented growth in the value of the CCIs in the world economy as well as rapid technological changes inspired by CCIs. The realisation of the social and economic value of the cultural and creative economy has increased.

Globally, the world has witnessed an increase in the contribution of CCIs to employment generation, Gross Domestic Product (GDP), global trade and social impacts. United Nations Educational, Scientific and Cultural Organization (UNESCO)'s **Global Report on Cultural Policies | Culture : The Missing SDG UNESCO** (2025) notes, "3.39% of global GDP is generated by the CCIs, which represent an average of 3.55% of jobs." In Zimbabwe recognition of the role of CCIs is growing as evidenced by their coverage in national development plans and recognition of their contribution to job creation, trade and social justice.

1.2 Purpose and Objectives of the study

The research sought to:

- Quantify the contribution of CCIs to national economic output, including GDP and value-added metrics, employing internationally recognized methodologies adapted for local contexts
- Disaggregate employment data within CCI sub-sectors (both formal & non-formal) by key demographic variables such as age, gender, to elucidate labor market dynamics and inclusivity
- Assess the multiplier effects of CCIs on broader economic sectors, innovation systems, and entrepreneurial ecosystems, thereby contextualizing the sector's macroeconomic significance
- Identify systemic constraints and enablers affecting sectoral growth, including regulatory frameworks, access to finance, infrastructure, and skills development gaps
- Formulate actionable, evidence-based policy recommendations aimed at unlocking sector potential, fostering innovation, and enhancing equitable access to resources
- Assess the extent and value of the informal creative sector and its contribution to the broader economy, including the identification of key challenges and opportunities specific to informal CCI activities
- Develop actionable recommendations to support the formalization of informal CCI operations, while enhancing local, regional, and international market access, stimulating innovation, and addressing capacity-building needs for creative practitioners

The research findings will inform national and regional advocacy strategies, shape policy recommendations, as well as support strategic decision-making across government, civil society, and development partners. Ultimately, this research strives to position CCIs not only as contributors to economic value, but as vital components of inclusive national development.

2. Literature Review

2.1 Measuring the Impact of Cultural and Creative Industries

Several lessons were drawn from similar studies conducted in countries such as South Africa and Angola. These are some of the pioneer studies conducted in the region and will provide a critical comparative analysis and methodological guidance. Bokor (2023) observed numerous measurement methods for the contribution of CCIs which often focus on Productive activities (contribution to gross domestic product (GDP) or value added); Characteristics of cultural and creative enterprises (i.e., revenues or market size); Employment in cultural and creative industries and international trade in cultural and creative goods and services. This study focuses on all the areas mentioned above with a view to facilitate evidence-based policymaking in Zimbabwe.

This study drew key lessons from the South African Cultural Observatory on Measuring and Valuing South Africa's Creative Economy (2021) which employed a similar methodology to the one proposed for this study including online surveys covering employers and workers in all domains of the CCIs; key stakeholder interviews with domain leadership and macroeconomic modelling to estimate impact on CCI output and their contribution to GDP.

Measuring the impact of cultural and creative industries is key to assess the sector's GDP contribution, job creation potential, and inform policies and strategies for CCIs. It addresses fragmented data systems, particularly the absence of a national account for CCIs by ZimStats, and highlights the reliance on the informal sector data indicating the challenges with that data. The study is also a monitoring mechanism for the National CCIs Strategy, to guide government infrastructure investment, enhance job creation and align with Vision 2030, ultimately fostering a robust creative economy essential for Zimbabwe's growth into an upper-middle-income nation.

2.2 Informality in the CCIs

The informal economy represents a significant, yet often overlooked, share of the global economy and workforce. Globally, over 60% of the workforce is estimated to work in the informal economy, with the bulk of these workers in developing countries (Dinardi, 2020). Most of the world's population lives and works in the informal economy, continuing to struggle with their direct participation in the globalized economic arena (Boyle and Joham, 2013). Informal economy workers often lack the capabilities and assets needed to engage in productive economic transactions. The CCI exhibits different degrees of informality, making it difficult to fully capture all its subtleties. The International Labour Organisation (ILO) and the 21st International Conference of Labour Statisticians (ICLS) define the informal economy as encompassing all informal productive activities by persons or economic units, regardless of whether they are carried out for pay or profit (UNESCO report, 2024). These according to Choi and Usman (2020) can be grouped into informal enterprises (unincorporated, not registered with business or tax authorities and not fully complying with regulations) and informal employment (work that is not registered, regulated or protected by labour law or social security). In the context of Zimbabwe, informality pertains to the types and registration status of businesses, the characteristics of the work, the arrangements for employment, the status of workers, working hours, availability of social protection, as well as the registration and payment status for taxes (UNESCO, 2024). Zimstat (2019) defines informal establishments as those not registered with the Registrar of Companies, while informal employment includes own-account workers, employees without social protection or written contracts, and unpaid family labour.

Estimating the size of the informal sector in the CCI of Zimbabwe is nearly impossible due to a continuous absence of accurate records and documentation, a lack of transparency, and a significant proportion of informal groups and artists (Majachani et al., 2023; Eveleigh, 2013). UNESCO (2024) reports that Zimbabwe's broader economy is predominantly informal, with more than 80% estimated to be employed in the informal economy. The report documents a dominance of informal operations across live music, television, film, visual arts, crafts and fashion, with most enterprises and workers falling outside registration and formal social protection. The National Cultural and Creative Industries Strategy (2020-2030) characterizes the sector primarily as consisting of small to medium-sized businesses and independent professionals, frequently facing challenges such as restricted access to funding, career development opportunities, and market reach, which results in many working in unstable and semi-formal or informal situations.

2.3 Drivers of informality in the Cultural and Creative Industries

Literature on informality associates high levels of informality with low-income levels, weak institutional frameworks, limited capacity for enforcement, and significant regulatory challenges. In Sub-Saharan Africa, informality is particularly prevalent in low-income, fragile, and commodity-dependent economies (Choi and Usman, 2020). In Zimbabwe, the expansion of the informal economy is associated with ESAP-related retrenchments, de-industrialisation, declining formal employment and the need for households to supplement incomes (UNESCO,2024). Several businesses in Zimbabwe closed their doors and dismissed employees, contributing to the economic and political turmoil that has affected the nation since the late 1990s (Zhou and Pindiriri, 2015). For many, informal CCI employment represents one of the limited viable livelihood strategies in this situation.

Spatial marginality, low entry barriers and project-based work favour informality of the CCI sector (Dinardi, 2020). A large share of creative productions emerges in the peripheral and informal settlements where public infrastructure and policy support are limited, pushing these activities further into informality. Many creative activities, such as digital content, crafts and street performance, require limited capital but rely heavily on talent and networks. This encourages freelancing, self-employment and short-term gigs rather than standard employment contracts.

The intangibility of creative outputs and weak Intellectual Property (IP) enforcement complicate contracting, royalty collection and taxation, making informal arrangements more common (NCCI report, 2020). UNESCO (2024) identifies several drivers of informality in Zimbabwe's CCI sector, such as lack of incentives to formalize, poor working conditions, limited funding, data invisibility, regulatory complexity and costs. A lack of incentive to formalise arises when creative workers and small CCI enterprises see few meaningful benefits from entering the formal economy compared to the costs and burdens involved. Since formalisation typically incurs extra expenses (such as registration fees, taxes, and licenses) and complicated administrative processes, while providing minimal benefits like access to financing, reliable markets, social protection, or government assistance, many creatives do not see a practical enhancement in their living conditions from becoming formal. In contexts like Zimbabwe, where incomes in CCIs are irregular, enforcement is weak, and state support systems are limited or inaccessible, remaining informal provides greater flexibility, lower operating costs, and fewer compliance obligations. As a result, formalisation appears costly, bureaucratic, and unhelpful, reducing the motivation for creative workers to pursue it. Private Voluntary Organisations Amendment Act, 2025, is yet to be embraced by several CCIs organisations. Some institutions have raised their frustrations over the Act as the compliance mechanisms associated with it. The Act therefore can support the existence or persistence of informality through regulatory challenges that may force some organizations to operate without being officially registered.

2.4 Contribution of the Informal CCI Sector

The informal sector has evolved into a center for skills training, where experienced or skilled individuals provide informal on-the-job training to their younger, unskilled employees, who eventually become proficient in the trade without participating in formal education or receiving official qualifications at the end (Magidi, 2024).

In times of crisis and rapid social environment changes, ordinary people, by creating informal public art, discover their capacity to maintain social relations through creating new social spaces for new modes of social interaction in their communities and beyond (Chen 2022).

Despite this vital input into the economy, the informal economy remains largely marginalised, with operators in the informal activities receiving little attention from the formal structures of the state (Machemedze et al, 2018). The effects of COVID-19 cannot be under-estimated as its repercussions on formal operations of most creative businesses were severe. Creative social enterprises which had made significant efforts towards formalisation were affected by COVID-19 effects and some are still grappling with these effects. This has affected efforts to formalize.

2.5 Policies Governing the CCIs in Zimbabwe

2.5.1 Continental and Regional Policy Frameworks

The African Union (AU) Agenda 2063 outlines a comprehensive 50-year development plan for Africa, aiming to address significant advancements across the continent. This includes renewed economic growth, and social justice. It emphasizes the importance of people-centered development, gender equality, and empowering youth while shifting global dynamics, such as rising globalization and the Information and Communication technologies (ICT) revolution, greater unity among African nations, and emerging opportunities in sectors like infrastructure, education, as well as value addition to African commodities. A crucial aspect of Agenda 2063 is its pillar five, which has been transformed to Moonshot five on Pan-Africanism which seeks to reinforce African values and culture and ensure that they are explicit, promoted, and celebrated, enabling an Africa with a Strong Cultural Identity. This pillar places emphasis on promotion of Pan-African values, cultural renaissance, heritage, and fostering creative industries to build unity, self-reliance. Also integral to strengthening CCIs are two initiatives of the Agenda 2063: the establishment of the African Continental Free Trade Area (AfCFTA) and its respective Protocols on Intellectual Property and Digital Trade which aims to enhance intra-African trade and strengthen Africa's position in the global market, and the introduction of the African passport and the free movement of people, which intends to eliminate barriers to travel, work, and reside within Africa for its citizens.

The Charter for African Cultural Renaissance (2006) is a crucial document outlining cultural policy across the continent. It emphasizes that there are no boundaries to the cultural evolution of a society. It articulates a collective commitment to fostering the cohesive cultural advancement of Africa, while recognizing that the rapid advancements in information and communication technologies present challenges to cultural identities and diversity. Ultimately, it promotes cultural collaboration among Member States to bolster African unity, and this is key for unlocking trade, cultural exchange and promotion of Zimbabwean CCIs.

The Revised AU Plan of Action for Cultural and Creative Industries (2008) framework acknowledges the sector's contribution to economic development, promoting good governance, alleviating poverty, employment creation, trade and enabling continental integration. The plan establishes priorities and strategies for advancing African CCIs which is also critical to the Zimbabwean CCIs landscape.

The Statute of the African audio-visual and cinema commission (2019) was established as a Specialized Agency of the African Union to develop and strengthen the African audiovisual and cinema industry with the aim to promote frameworks which enhance collaboration among African nations in the realm of audiovisual and cinema. Furthermore, by leveraging audiovisual and cinematic mediums, the African Audio-Visual and Cinema Commission (AACC) seek to foster creativity and innovation, support the development of skills and talent, as well as training and certification within the African film industry, to improve the quality of film productions. These initiatives bear significance for promoting the Zimbabwean film industry.

Southern African Development Community (SADC) Protocol on Culture, Information and Sports (2001): The Protocol was promulgated in 2001 to promote regional integration in sports, information, arts and culture while celebrating the region's cultural diversity. It encourages Member States to closely cooperate in the key areas of research, cross-border copyrights protection and harmonization of copyright laws; training, capacity enhancement;

flow and exchange of information, resource mobilisation as well as preservation of cultural heritage. It also promotes cultural exchange among SADC States in the form of joint cultural festivals which can open access to regional markets by cultural entrepreneurs and producers. Regardless of having some of these policies, a lot more work which entails domestication, putting in place implementation strategies and strengthening the operationalisation of such policies must be undertaken to facilitate implementation.

2.5.2 National Policy and Legal Frameworks

CCIs fall under the Ministry of Sport, Recreation, Arts and Culture and its agencies, the National Arts Council of Zimbabwe, the National Gallery of Zimbabwe, the National Library and Documentation Centre. The MSRAC oversees CCIs policy formulation,implementation and evaluation. Some of the policies that are in place include, the National Arts, Culture and Heritage Policy (2020), National Cultural and Creative Industries Strategy (2020-2030), The Zimbabwe Music Strategy (2023-2027) and The Zimbabwe Film Strategy (2025-2030). These strategies are anchored on strategic pillars and articulate objectives to be prioritized by the government to strengthen the CCIs value chain and ecosystem. The pillars covered by the policies are directly linked to key priority needs of the broader CCIs. They are very much aligned to the sectors and domains covered by the 2009 UNESCO Framework for cultural statistics - Cultural and Natural Heritage; Performance and Celebration; Visual Arts and Crafts; Books and Press; Audiovisual and Interactive Media; and Design and Creative Services, Sport and Tourism. When reflecting on Zimbabwe's CCIs trajectory these are sectors which drive the growth of the CCIs.

In addition, there are broad national development policies adopted by the government of Zimbabwe which also provide for CCIs and enable their role in socio-economic development. Under the Vision 2030 Zimbabwe, launched in September 2018, has set itself to become a Prosperous Upper Middle-Income Nation by 2030. Vision 2030 identifies key pillars to achieving this including redressing economic challenges; championing investment and business and improving the livelihoods of the ordinary citizenry among others. To attain the Vision 2030, the government adopted the National Development Strategy 1 (NDS1) (2021-2025) which is approaching its conclusion in December 2025. Focusing on job creation, youth development and cultural preservation, NDS 1 sought to achieve inclusive growth and sustainable economic development leveraging the country's CCIs rooted in the country's rich arts, culture and heritage. The Vision 2030 aligns very well to the 17 Sustainable Development Goals by United National. The government also unveiled the National Development Strategy 2 (NDS2) in December 2025. NDS 2 identifies ten broad national priorities aimed at driving development across all sectors, which include cultural and creative industries, providing a framework to guide policy, investment, and strategic initiatives from 2026 to 2030. NDS 2 prioritizes the expansion of the creative and cultural industries and their contribution to GDP, social cohesion, and job creation, with a focus on youth employment. This will be accomplished through strengthening tourism collaborations, preserving cultural heritage, establishing cultural infrastructure, and integrating digital technology. The government will work to promote decent work by supporting economically rewarding creative careers through identification, development, and professionalization of talent and revising and aligning laws governing the cultural and creative industries. This is key to strengthening cultural governance.

Key legal frameworks that primarily regulate the CCIs include the National Arts Council of Zimbabwe Act, (1985), National Gallery of Zimbabwe Act (Chapter 25:09), (1972) the Censorship and Entertainments Control Act (1967), the Copyright and Neighboring Rights Act [Chapter 26:05] 2000 and Copyright and Neighboring Rights Regulations 2006. Additional laws pertaining to anti-piracy measures and copyright enforcement include the Intellectual Property Tribunal Act [Chapter 26:06]. Copyright is protected for the life of the author and 50 years after the death of the author and in the case of joint authorship 50 years after the death of the last surviving author (s 15). The rights of the author, performer or producer are acquired by virtue of the creation of a work, by contract or by license. Section 45 provides that copyright may also be transmitted as incorporeal movable property by assignment, testamentary disposition or operation of law. However, registration of works with the Copyright Society helps the authentication of ownership of copyright. Copyright laws provide copyright owners with both exclusive economic and moral rights of authors.

Moreover, the Printed Publications Act [Chapter 25:14] governs the printing and publication of books, newspapers, periodicals and other printed publications and the preservation of books, newspapers, periodicals and other printed publications published in Zimbabwe. It sets out in section 4 Particulars to be set out in books printed or published in Zimbabwe. Section 5 of the same Act also provides for Delivery of books published in Zimbabwe to certain libraries.

3. RESEARCH METHODOLOGY

3.1 Scope

Coverage of CCIs Domains: The UNESCO Institute for Cultural Statistics (2009) proffered a framework that defines CCIs' domains, including related domains. It identified 6 main cultural domains, namely Cultural and Natural Heritage; Performance and Celebration; Visual Arts and Crafts; Books and Press; AudioVisual and Interactive Media; and Design and Creative Services. 2 related domains are sports and recreation. This study engaged respective respondents drawn from all the eight (8) domains. The study focused on the following variables: contribution to GDP; Employment, Value Added, Trade performance, and Informal sector inferences.

3.2 Study Design

The selected design for the study - Economic Contribution of the Cultural and Creative Industries (CCIs) to GDP, Employment, and Informal Sector Dynamics in Zimbabwe demonstrates methodological rigor and contextual relevance. It provides detailed explanation of the research framework linking research questions, data sources, collection methods, and analysis strategies. The study design operates within internationally recognised standards in measuring economic contribution of the CCIs to GDP, Employment, and Informal Sector Dynamics.

3.3 Conceptual Framework

The study utilized the 2009 UNESCO Framework for Cultural Statistics (FCS) as its design as the 2025 UNESCO Framework for Cultural Statistics came into force when the study was already underway. The team could not abruptly abandon all the work which had started under the 2009 FCS. The study conformed to the 2009 UNESCO Framework for Cultural Statistics (FCS) considering the framework's gained credibility in Zimbabwe for producing results as it was once used for a closely similar study by The Culture Fund of Zimbabwe with assistance of ZIMSTAT in 2012 on a project funded under UNESCO International Fund for Cultural Diversity (IFCD).

The UNESCO Framework for Cultural Statistics (FCS) is a tool for organizing cultural statistics both nationally and internationally. It is based on a conceptual foundation and a common understanding of culture that will enable the measurement of a wide range of cultural expressions irrespective of the economic and social mode of its production. Through its standard definitions, it will also allow to produce internationally comparable data

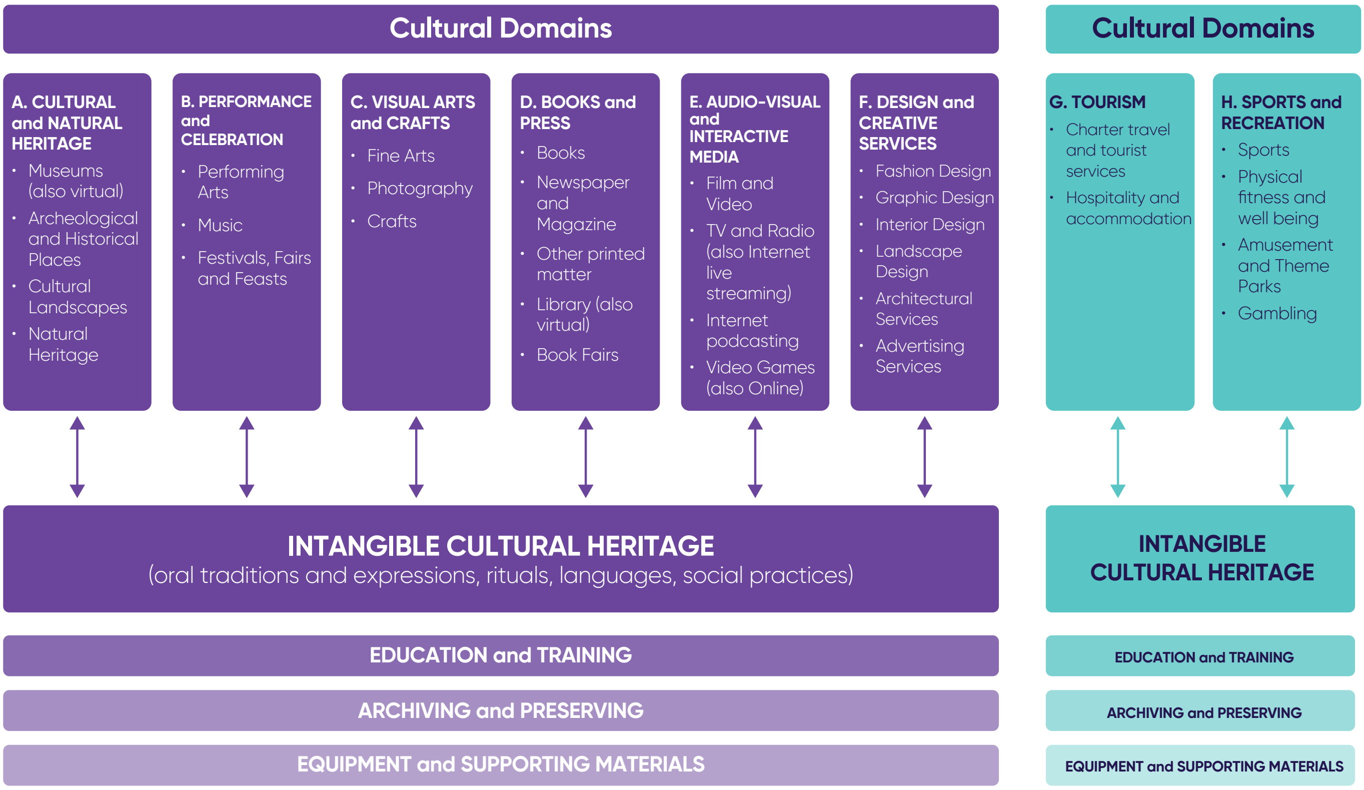


Figure 1: Framework for Cultural Statistics Domains

Source: UNESCO Institute for Cultural Statistics, 2009

The absence of a single, internationally agreed definition of cultural and creative industries means that the study must adopt a specific definition of the industries. Accordingly, the study adopts the UNESCO definition of CCIs as it is the one that is predominantly used in official government documents in Zimbabwe. Limited availability of detailed data implies that there could be some variations across the indicators for activities, goods and services that are included.

3.4 Analysis of non-monetised activities

This included assessing how culture matters, in terms of social cohesion, cultural participation, health and well-being among others. This is a huge dimension of this study which could not be implemented comprehensively given the time and budgetary constraints. We prepared a case study on the impact of Peace in the Hood show, which is part of the Shoko Festival, a Zimbabwean event which is done by Magamba Network, a youth driven Organisation based in Zimbabwe. This is especially because it is an accessible, free-entry, show held annually in Chitungwiza's Unit L Grounds, celebrating and bringing people together through music and art to celebrate community and unity.

3.5 Data Collection

A mixed-method approach incorporating qualitative and quantitative research methods –, was employed by the study. Quantitative data was used to determine the contribution of CCIs (economic variables such as GDP contribution and employment figures). Insights from qualitative data (collected through desk review, case studies, focus group discussions, and key informant interviews) helped to contextualize the findings and provide explanations to quantitative data. Integrating quantitative data on economic contributions with qualitative insights from stakeholders offered a nuanced, validated, and policy-relevant understanding of how CCIs influence Zimbabwe's economy, employment, and informal sector dynamics, leveraging the strengths of both data types for a richer analysis.

3.5.1 Qualitative Research Methods

Desk Review: Through a thorough desk review, the study examined existing statistics, social, policy, institutional, legal, business, and economic context for the cultural industry. The review also facilitated a thorough stakeholder mapping which helped researchers to identify key institutions from where data could be obtained, given the scarcity of data, especially on trade in services, employment and contribution to national GDP.

Key Informant Interviews (KII): Semi-structured key informant interviews were conducted with diverse stakeholders across Zimbabwe through telephone and face-to-face interviews. A total of forty (40) interviews were conducted due to budgetary and time constraints. These interviews collected in-depth insights and viewpoints from individuals with expertise in CCIs, including policymakers, practitioners, enablers (such as hubs, talent managers and tech operators), funders, arts associations and community organisations. They also focused on key informal sector indicators such as informal employment rate (the percentage of people with jobs lacking social security and coverage by employment legal frameworks), characteristics of employment such as workers' status, firm size, registration status, and access to social protection and social dialogue, employment and trade (local and international).

Focus Group Discussions (FGDs): two (2) Focus Group Discussions were conducted in Harare and Bulawayo as the CCI's activity concentration is high in the mentioned two big cities of Zimbabwe. Twelve (12) composed of six (6) in each group had a broad expert knowledge and experience of the CCIs drawn from the diverse CCI domains and were engaged to explore issues related to the study. Through the FGDs, perceptions, knowledge, experiences, and practices within the entrepreneurial ecosystem of the CCI were recorded. The discussions followed a semi-structured approach carefully planned to gather a large spectrum of opinions, notions, and experiences.

3.5.2 Quantitative Methods

Survey: A questionnaire was developed and scripted onto KoboToolbox. An online survey was then deployed using the same platform. An application version was loaded onto android compatible mobile phones and tablets. The survey was popularised through official communication shared with the Ministry of Sport, Recreation, Arts and Culture, the National Arts Council of Zimbabwe (NACZ) and further popularised on social media platforms that included several WhatsApp groups of CCI practitioners. Data collection using the survey was executed over a period of 4 weeks. The advantages of using the survey methodology were that it was cost-effective and could collect large amounts of data from diverse participants in a short time frame, and it is effective in collecting data from players who cannot be easily reached for face-to-face interviews. They are also convenient, allowing ample time for the respondent to answer the questions, and findings can be easily analysed on the survey platform. The survey was conducted in all the ten (10) provinces of Zimbabwe with a good representation of the entire fifty-eight (58) districts that make up rural, peri-urban and urban communities of the nation. The representative sample was drawn from various sectors such as music, theatre, crafts & arts, new digital media, performing arts, film, audiovisual and multimedia production, fashion, literary arts and publishing. The overall sampling frame was the eight (8) domains of the UNESCO 2009 FCS, namely Cultural and Natural Heritage; Performance and Celebration; Visual Arts and Crafts; Books and Press; Audiovisual and Interactive Media; and Design and Creative Services, Sport and Tourism. The survey had a target to receive at least two hundred (200) respondents. However, distribution and wider dissemination of the survey aligned to the methodology used, reached more than an approximated 1,500 creatives. One hundred and forty-six (146) responded. Data cleaning processes removed thirty-three (at least two reasons for removal included incomplete data, missing values and premature submissions).

3.5.3 Sampling

Scope and Sampling: There is a clear concentration of cultural activity in Urban centres in Zimbabwe, hence interviews were largely conducted in key urban areas (Harare, Bulawayo, Victoria Falls, Masvingo) and purposively selected rural areas such as Binga, Nyanyadzi, Masvingo, Gwanda, Hwange and Lupane due to concentration of CCIs activity in those areas. The research employed purposive sampling, where individuals for key informant interviews and Focus Group Discussions (FGDs) were selected based on their specific knowledge and cultural domains. This was combined with Snowball Sampling, where key informants referred the research team to other suitable individuals for interviews, enabling reach of hidden populations, specifically within rural areas.

3.5.4 Macroeconomic Modelling

Macroeconomic modelling was applied to estimate the contribution of creative and cultural industries (CCIs) to output and Gross Domestic Product (GDP). The analysis adopted a pragmatic, multidimensional framework combining value-added decomposition, employment elasticity analysis, and multiplier-based interpretation informed by input–output relationships as reflected in official national accounts.

Rather than constructing a standalone input–output table for CCIs, the study utilised existing aggregate input–output and national accounts structures to assess production linkages, sectoral interdependencies, and income generation effects. This approach reflects international practice in contexts where detailed industry-specific input–output data are limited.

Value-added estimates were derived from official statistics, ensuring consistency with national GDP measurement and capturing economic activity in aggregate, inclusive of both formal and informal sectors. Employment effects were assessed using official employment data, complemented by elasticity-based interpretation to contextualise labour intensity within CCI subsectors.

Overall, this approach enables a coherent assessment of CCIs' economic contribution while transparently acknowledging data and classification constraints inherent in measuring creative activities, particularly in settings characterised by high levels of informality.

3.6 Limitations

a. There is a localised over-emphasis on the definition of CCIs as artists and arts sectors and not creativity. In addition, some of the sectors that are covered as CCIs domains under the UNESCO Framework for Cultural Statistics such as sports, architecture, landscaping and design do not identify as CCIs, because of this narrow understanding of CCIs some of the significant CCIs did not participate in the survey as they do not identify as CCIs.

b. Differences in classification standards presented a key methodological limitation. To align the datasets, several CCI-related categories had to be merged into broader classes, while others could only be partially isolated because they were embedded within wider industry groupings that extended beyond the strict boundaries of the CCI sector. As a result, full disaggregation at sub-sector level was not always possible, and in some cases, estimates reflect aggregated or proxy categories rather than pure CCI activities.

c. The mismatch between the UNESCO 2009 framework for Cultural Statistics, International Standard Industrial Classification of All Economic Activities, ISIC Rev. 4 which is an international industrial classification for economic activities affected coverage of all domains in data collected from ZimStat. ISIC is a standard that is used across the world to classify data in national statistical organisations as well as official statistics and HS codes are the international classification standards used by all customs on goods that crosses the border in international trade. In Zimbabwe, the Zimbabwe Revenue Authority (ZIMRA) is the custodian of Harmonised System (HS) Codes. These classify goods and do not classify activities. This therefore - made it difficult to appropriately identify and classify certain sub-industries within the national data architecture. These included:

- Crafts
- Internet podcasting and digital audio content production
- Video game development and interactive media
- Landscape design
- Cultural tourism (including cultural tours and gastronomy-related activities)
- Sports and recreational cultural activities
- Arts and cultural education
- Cultural landscapes and heritage-based spatial assets

3.7 Data Confidentiality, Integrity and Security

Data Integrity: Researchers, upon commissioning of the study, engaged respective officials and key stakeholders of the significance of conducting the study of this nature. The National Arts Council of Zimbabwe (NACZ) and the Ministry of Sport, Recreation, Arts and Culture officials had meetings and official communication exchanged regarding the study. The Director General of the Zimbabwe National Statistics Agency (ZIMSTAT) was engaged with a team of researchers, and all were very supportive to the processes and committed to support the research processes in response to the requirements of the study. Their corporation from the start acted in good faith and professionally as a full pledge of supporting the study.

Inception meeting - ZimStat Director General, Team & Researchers: 10/10/25 - Venue: ZimStat Offices

In addition, the study sought consent of all participants before data was collected using simple language which is easy to understand. For the interviews, an in-depth explanation of the study was offered at the beginning to ensure that participants fully understood what they were consenting to. Participants were assured that data would be analysed in such a way that one cannot easily link it to certain individuals.

Interview and Focus Group Data: All recordings and study data are stored on a secure Google drive that only the researchers have access to. The researchers implemented a 2-step verification to access all research data to prevent unauthorized modifications

Kobo Survey Platform: The study utilized the Kobo platform for data collection as it is secure. Kobo accounts are password-protected to deter unauthorized access. In addition, data sent to Kobo servers is encrypted using RSA and SHA256 to protect it during transmission while all database content stored on servers is encrypted at the disk level.

Data Integrity: The researchers tested all data to ensure it meets the defined criteria during its entry, coding and use. The final study findings were validated by the stakeholders in the CCIs.

4. ESTIMATING THE ECONOMIC CONTRIBUTION OF CCIs

Secondary data from the Zimbabwe National Statistics Agency (ZIMSTAT) and other Government Ministries, Departments and Agencies were used to estimate the contribution of the Cultural and Creative Industries (CCIs) to the Zimbabwean economy. The analysis disaggregated CCI domains in line with the UNESCO cultural classification framework. However, the available national datasets were primarily compiled using the International Standard Industrial Classification of All Economic Activities, Revision 4. In addition, data on international trade in CCI-related goods was classified according to the HS coding structure.

4.1 Contribution to Employment

Employment estimates in this study are limited to persons engaged in work for pay or profit, in line with standard labour statistics definitions. This scope excludes activities undertaken for own consumption, volunteer work, unpaid apprenticeships or traineeships, and engagement in personal hobbies or other non-remunerated forms of creative activity. As such, the estimates presented reflect only economically recorded participation and do not capture the full extent of creative engagement within the population.

In 2025, Zimbabwe recorded a total of 3,186,597 employed persons. Of this total, employment classified under the Arts, Entertainment and Recreation sector accounted for approximately 0.5 percent. When disaggregated by sex, the sector represented 0.6 percent of total male employment and 0.2 percent of total female employment, indicating a pronounced gender disparity within activities captured by standard labour classifications.

Recognising that many cultural and creative activities are not fully represented within the conventional Arts, Entertainment and Recreation category, the analysis was extended to include related CCI domains mapped across relevant ISIC classifications. Under this broader classification, an estimated 22,223 persons were engaged in CCI-related activities, corresponding to approximately 0.7 percent of total national employment. These estimates are derived from official employment statistics and should be interpreted as indicative of recorded economic participation rather than a comprehensive measure of all creative work, particularly in informal and freelance contexts.

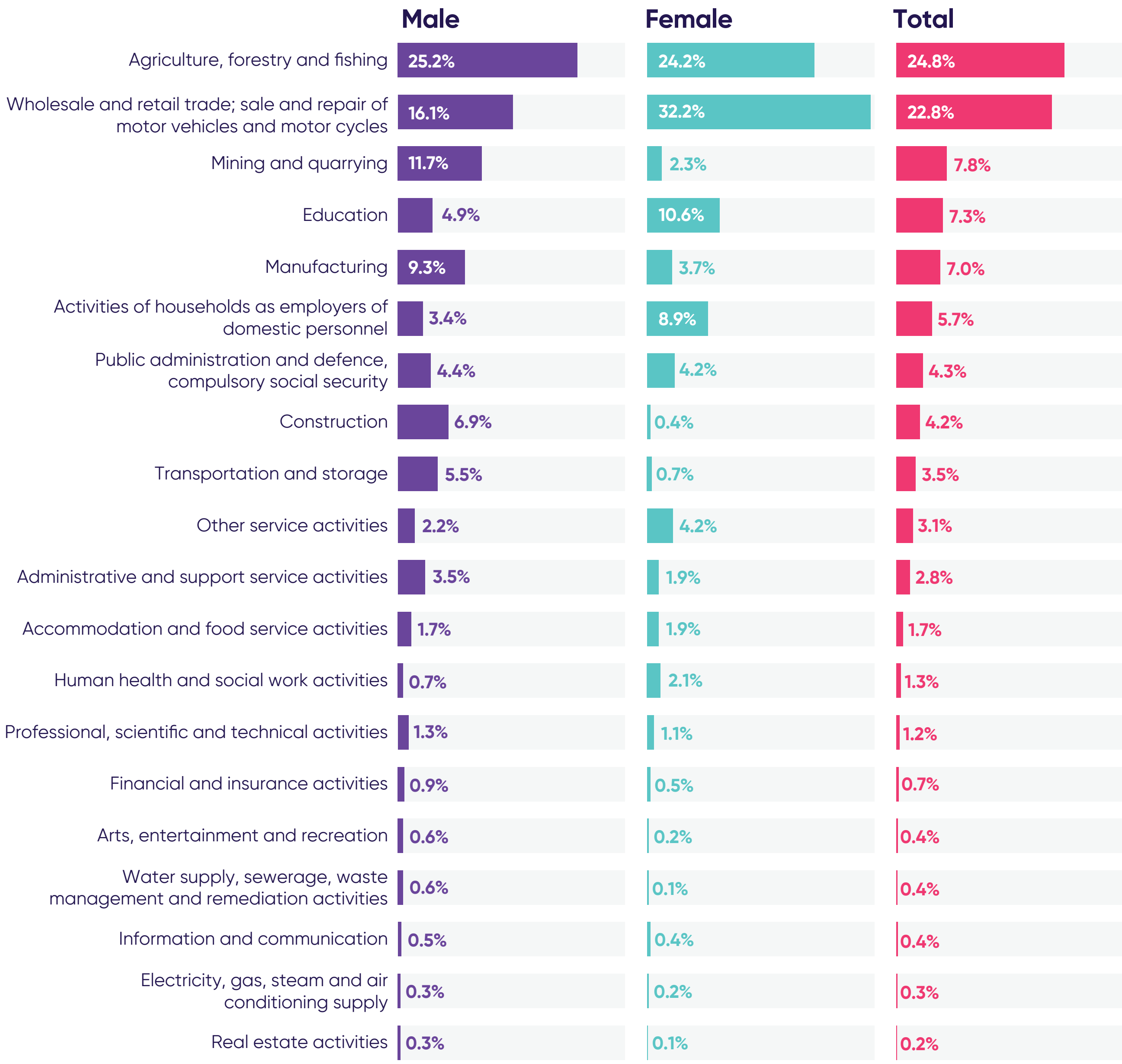


Figure 2: Employment by Industrial Sector and Sex

Source: Labour force Survey, 2025

Within the estimated CCI workforce, Fashion, Graphic Design and Interior Design together accounted for the largest share of employment (17.1 percent), followed by Photography (16.0 percent). Employment in Architectural Services and Other Printed Media each accounted for 9.0 percent, while Newspapers and Magazines contributed 1.6 percent.

Overall, these patterns underscore the relative importance of design-oriented and visual creative activities within Zimbabwe's recorded CCI employment structure, while also highlighting the continued presence of traditional print-based sectors. At the same time, the findings point to likely underrepresentation of informal, project-based, and digitally mediated creative work, which remains only partially captured by existing labour statistics.

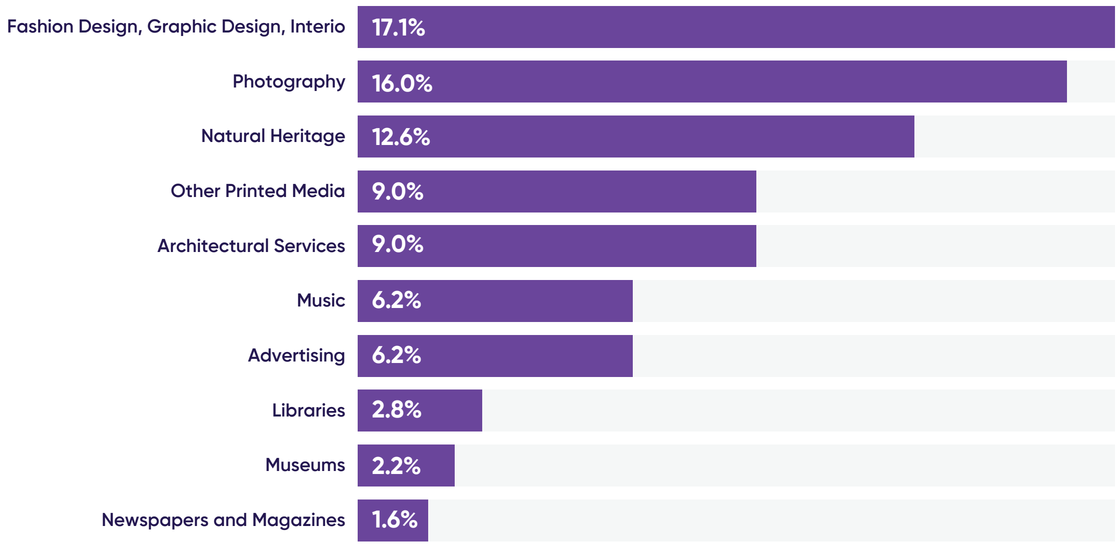


Figure 3: Proportion of Employed Persons in CCIs

Source: Survey data, 2025

4.2 Informality in CCIs Employment

4.2.1 Employment Status

Survey Findings indicate that the dominant employment status in the CCIs in Zimbabwe is self-employment. The ILO ICSE 93 classification provides for four categories of workers in self-employment as employers, own-account workers, members of producers' cooperatives and contributing family workers. 59.5 percent of respondents indicated that they were in self-employment while 32.4 percent were in paid employment as shown by the chart below.

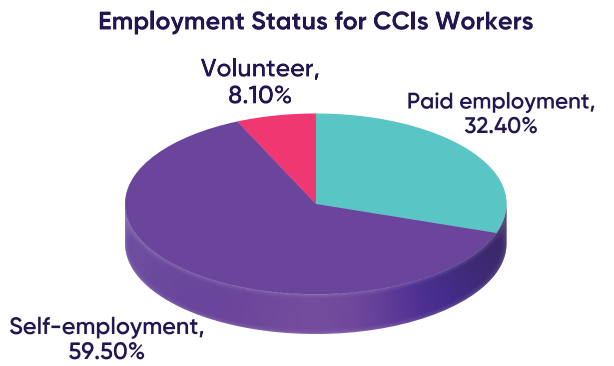


Figure 4: Employment Status of Workers in the CCIs

Source: Survey data, 2025

This may indicate that most individuals in CCIs operate as independent creatives, entrepreneurs, or freelancers rather than in paid employment. The high self-employment may also reflect the informal and entrepreneurial nature of the CCI in Zimbabwe. Volunteer participation reflects community engagement and the precarious nature of creative work, where not all contributions are compensated financially.

The survey also revealed that most respondents identify as permanent employees, with 58.3 percent of respondents indicating that they are permanently employed as shown by the table below:

Table 1: Nature of Employment of CCIs Workers

Fixed term (%)	Paid apprenticeship (%)	Permanent (%)	Short-term (%)	Total (%)
16.7	12.5	58.3	12.5	100%

Source: Survey data, 2025

While there is an indication of permanent employment by most workers, this can be due to lack of clarity of understanding of how permanent employment was defined among respondents. Key informant interviews and focus group discussions indicated that most owner-operators of businesses without employees as well as own-account workers in household market enterprises without employees identify as permanent employees as they are indefinitely employed by their businesses.

4.2.2 Main Source of Income for CCIs Workers

The survey and key informant interviews pointed to the importance of CCI employment to practitioners within the sector as most respondents indicated that their CCIs jobs are their main source of income as shown by the table below.

Table 2: Main Source of Income for CCIs Workers

CCI is the main source of income	Individual	Organisation	Total
No	33.8%	41.0%	36.3%
Yes	66.2%	59.0%	63.7%
Total	**100.0%**	**100.0%**	**100.0%**

Source: Survey data, 2025

While analysis of the survey data could not establish a significant link between whether a respondent is an individual or an organisation and whether CCI income is the main income source for the respondent, the overall analysis indicates that 63.7 percent of both individual and organisation respondents rely on their CCI jobs as the main source of livelihood. Significant to note from the findings is that women and youths, especially those domiciled in the rural areas rely on CCI such as crafts and visual arts to support their livelihoods as they have limited access to other economic activities for income generation.

4.2.3 Working hours

Workers in the CCIs tend to work for long hours but most of their job opportunities are not productive as incomes are not commensurate with the level of effort. This also points to dominance of unpaid work such as rehearsals as shown below:

Table 3: Working Hours in the CCIs

Working Hours Category	Percent
Less than 20 hours a week	24.3
Less than 35 hours but more than 20 hours per week	13.5
Between 36 and 48 hours a week	31.1
Over 48 hours a week	13.5
Over 60 hours a week	17.6
Total	**100**

Source: Survey Data, 2025

The distribution of working hours reveals high levels of workload intensity and irregular employment patterns within the Cultural and Creative Industries. Although a notable share of respondents (31.1%) work standard full-time hours (36–48 hours), a significant proportion work either very low hours (24.3% working less than 20 hours) or very long hours, with 13.5% exceeding 48 hours and another 17.6% working more than 60 hours per week. This bipolar pattern reflects the dual nature of the CCIs where some workers experience underemployment due to inconsistent gigs or project-based work, while others face excessive hours driven by tight production deadlines, multiple job roles, or self-employment pressures. Overall, the distribution highlights the informal, unpredictable, and often unsteady nature of labour in the CCI sector, where workers rarely have stable or regulated working time.

4.2.4 Cultural and non-cultural jobs

Survey findings revealed a highly fragmented and multi-job employment pattern typical of the Cultural and Creative Industries (CCI), where only a small proportion of workers rely on a single stable job as shown below. The largest group of respondents (28.4%) works across multiple CCI sectors, indicating portfolio careers and the need to diversify income due to unstable or insufficient earnings from any one activity. Another 24.3% have one job in a single CCI sector, while 23% combine CCI and non-CCI work, reflecting the instability of cultural labour and the need to supplement creative income with other jobs. The presence of workers juggling non-cultural roles (10.8%) or holding cultural jobs outside CCI (5.4%) further demonstrates blurred boundaries between creative and non-creative employment.

Table 4: Number of jobs held by workers within the CCIs within the context of cultural and non-cultural work.

Type of Work / Employment Pattern	Percent
I have 2–4 jobs within different sectors of the CCI	28.4
I have only one job in 1 sector of the CCI	24.3
I work in both CCI and other industries	23.0
I have a non-cultural job but work within the CCI (e.g., accountant, driver, admin)	10.8
I have only 1 cultural job outside of the CCI (e.g., agriculture, mining)	5.4
I have 2–4 jobs in one sector of the CCI	5.4
I have 2–4 cultural jobs outside of the CCI	2.7
Total	**100.0**

Source: Survey Data, 2025

4.2.5 Place of operation

The results show that individual creatives overwhelmingly work from home while organisations are more likely to operate from offices. This reflects a limited access to infrastructure, which is likely to contribute to limited access to safety and health standards, which characterises high levels of informality in the CCIs sector as shown below:

Table 5: Place of Operation for CCIs Businesses

Operating Place	Individual (%)	Organisation (%)	Total (%)
Community Center / Arts Hub	16.2	–	10.6
Home	55.4	46.2	52.2
Office	24.3	53.8	34.5
Other	1.4	–	0.9
Invited to productions / produced a few from personal resources	1.4	–	0.9
Rented apartment	1.4	–	0.9
Total	**100.0%**	**100.0%**	**100.0%**

Source Survey Data, 2025

The survey also revealed a limited access to resources such as funding as most respondents indicated that they did not access funding from formal institutions such as funding organisations, finance institutions such as banks, private sector sponsorships and government grants within the last five years.

4.2.6 Limited Access to Social Protection

Most individuals responding to the survey (62%) indicated that they are not covered by social security programmes and their employers do not contribute towards NSSA or private pension fund for them. The data indicate low levels of access to social security, reflecting limited employer compliance and widespread informality.

ACCESS TO SOCIAL PROTECTION BY RESPONDENTS

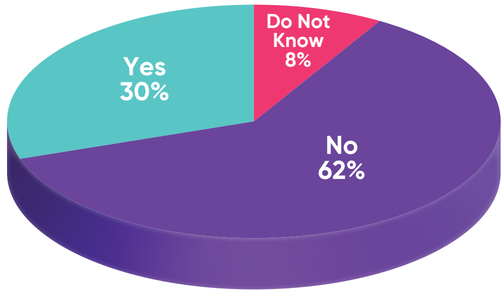


Figure 5: Access to Social Protection by Survey Respondents

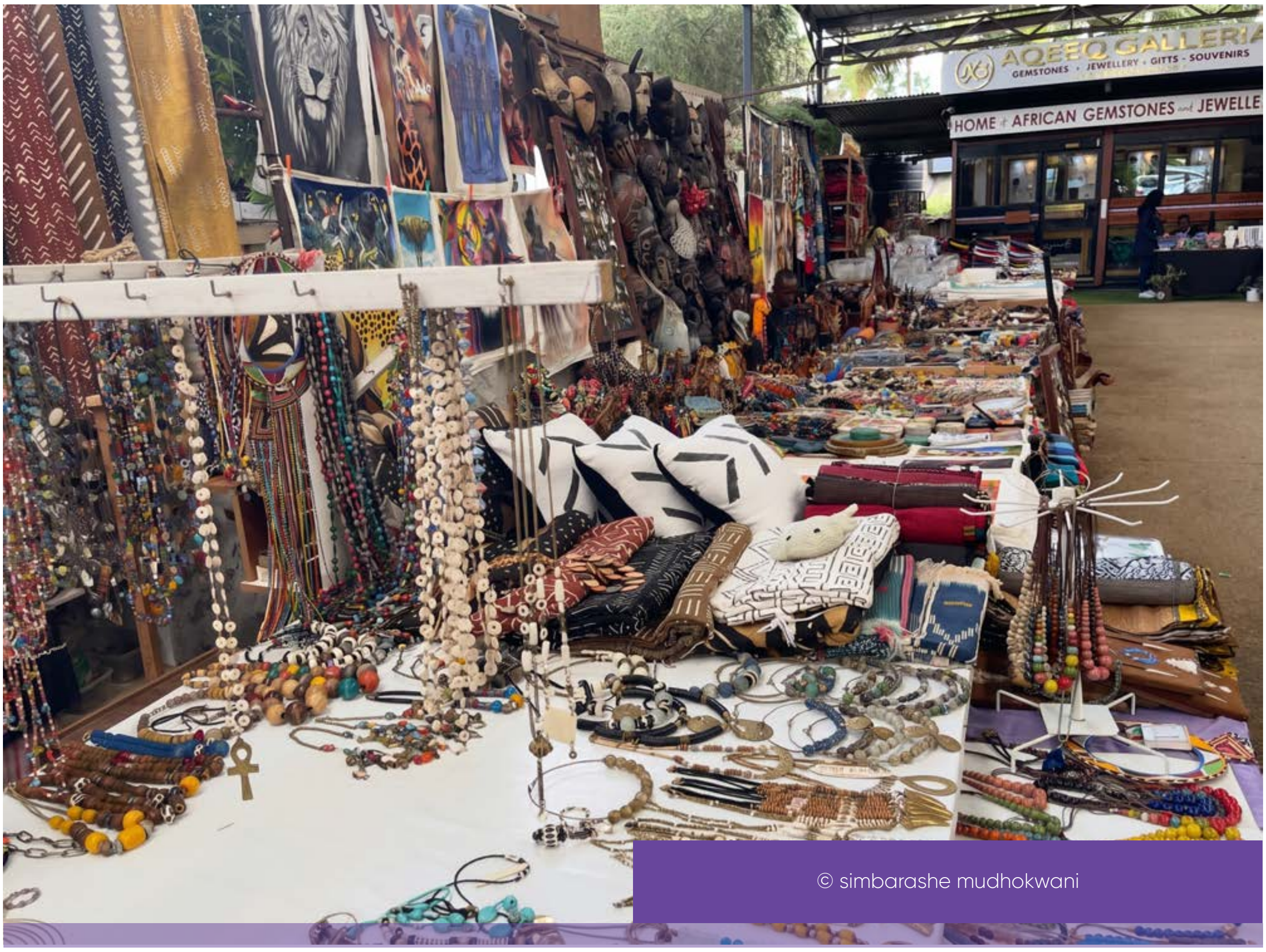
Source: Survey data, 2025

4.3 Contribution to Trade

4.3.1 Trade Performance

Data on imports and exports recorded by customs authorities were used to assess the international trade performance of the Cultural and Creative Industries (CCIs). These data are compiled using the HS classification and capture formal cross-border trade in tangible cultural goods. As such, the analysis reflects only recorded merchandise trade and does not include trade in cultural and creative services, informal exchanges, or mobility-based cultural activities.

In 2024, Zimbabwe's total imports amounted to approximately USD 9.9 billion, while total exports were estimated at USD 7.4 billion, resulting in an overall trade deficit of about USD 2.4 billion. Within this context, CCI-related imports totalled USD 21.9 million, accounting for approximately 0.22 percent of total imports. For the period January to September 2025, CCI-related imports were estimated at USD 14.8 million. The largest import categories in both periods were chemical preparations for photographic use, which accounted for USD 12.0 million in 2024 and USD 6.9 million during the first nine months of 2025, followed by other printed matter, valued at USD 8.9 million in 2024 and USD 7.3 million for January–September 2025.



© simbarashe mudhokwani

On the export side, recorded CCI-related exports amounted to approximately USD 10.8 million in 2024, representing about 0.14 percent of total exports, and USD 10.6 million for the period January to September 2025. The principal recorded export categories were collections and collectors' pieces of zoological interest, estimated at USD 9.2 million, and original sculptures and statuary, valued at approximately USD 1.2 million in 2024.

Based on recorded merchandise trade, Zimbabwe registered a trade deficit in CCI-related goods of approximately USD 11.1 million in 2024 and USD 4.2 million for the period January to September 2025. These deficits should be interpreted with caution, as they reflect only formal trade in goods. They do not account for cultural and creative services exports, informal or mobility-based trade common among artists and performers, or exports channelled through regional hubs and intermediaries.

Accordingly, the observed trade deficits point to areas where domestic production and value addition could be strengthened, while also highlighting potential under-recording of CCI economic activity. Improved measurement of services trade, informal cultural exchange, and regional transit flows would provide a more complete assessment of the international trade performance and export potential of Zimbabwe's CCIs.

Table 5: Zimbabwe's Imports Value in CCI related Products by HS Class (USD)

HS / Year	2024 (USD)	January to September 2025 (USD)
Newspapers, books, periodicals and journals	569,512.96	245,132.91
Plans for architectural purposes; handwritten texts; photographs of	2,876.19	3,558.58
Pictures, designs and photographs	163,712.96	71,572.73
Guide books and directories; publicity relating to fairs, travel or exhibitions	10,383.29	5,458.81
Instructional charts and diagrams	1,373.39	3,696.50
Other printed matter	8,920,633.20	7,323,165.99
Photography and photographic materials	53,755.61	67,354.88
Cinematograph materials	1,286.47	-
Sensitising emulsions for photographic uses	33,789.83	42,290.83
Chemical preparations for photographic use, nes	11,911,534.03	6,890,218.33
Cameras, taking 35mm roll film, nes	1,639.89	9,697.20
Paintings, drawings and pastels executed entirely by hand	29,662.05	21,520.03
Mosaics	1.56	-
Original sculptures and statuary, in any material	85,255.38	29,196.43
Collections and collectors' pieces of archaeological, ethnographic or historical	25,560.28	33,044.03
Other	119,202.87	55,262.59
Total	**21,930,180.38**	**14,801,799.84**

Table 6: Zimbabwe's Exports value in CCI related products by HS Class (USD)

HS \ Year	2024 (USD)	January to September 2025 (USD)
Other newspapers	2,496.21	-
Other journals and periodicals	12.59	-
Pictures, designs and photographs	110.89	-
Other printed matter	2,398.79	17,832.18
Paintings, drawings and pastels	7,510.42	96,677.37
Collages and similar decorative plaques, executed entirely by hand	-	2,319.19
Paintings, drawings and pastels	12,625.47	8,820.84
Paintings, drawings and pastels	12,625.47	8,820.84
Other cultural exports	303,513.69	154,226.26
Original sculptures and statuary, in any material	1,245,937.92	911,050.05
Collectors' postage or revenue stamps..., first-day covers, etc other than those	2.24	-
Collections and collector's pieces of zoological... interest	9,206,269.33	9,402,339.07
Collections and collectors' pieces of archaeological, ethnographic or historica..	1,599.88	-
Antiques of an age exceeding 100 years	55.44	-
Total	**10,782,532.88**	**10,593,264.97**

4.3.2 Export Market Opportunities

Export market opportunities for CCIs within the continent exist in countries such as South Africa, Zambia, Mozambique and Malawi. Trade with Asia is more directed towards Japan and China. Significant trade with the USA, European Union and United Kingdom (UK) is also notable. EU countries such as Spain, Germany and The Netherlands are recognised as some of the major export destinations for Zimbabwean CCIs. South Africa is a top destination for CCIs goods and services from Zimbabwe as 17 Survey respondents indicated that they have exported goods and/or services to South Africa in 2024/2025. The Key Informants also indicated that some Zimbabwean products are exported to Europe via South Africa. It is therefore imperative to note that South Africa plays a dual role when it comes to the exportation of cultural goods – i) as a destination and big market for Zimbabwe's cultural products ii) South Africa is also a middleman connecting Zimbabwean CCIs to other destinations. The graph below indicates the 10 top destination countries for Zimbabwean CCIs goods and services as indicated by survey respondents.

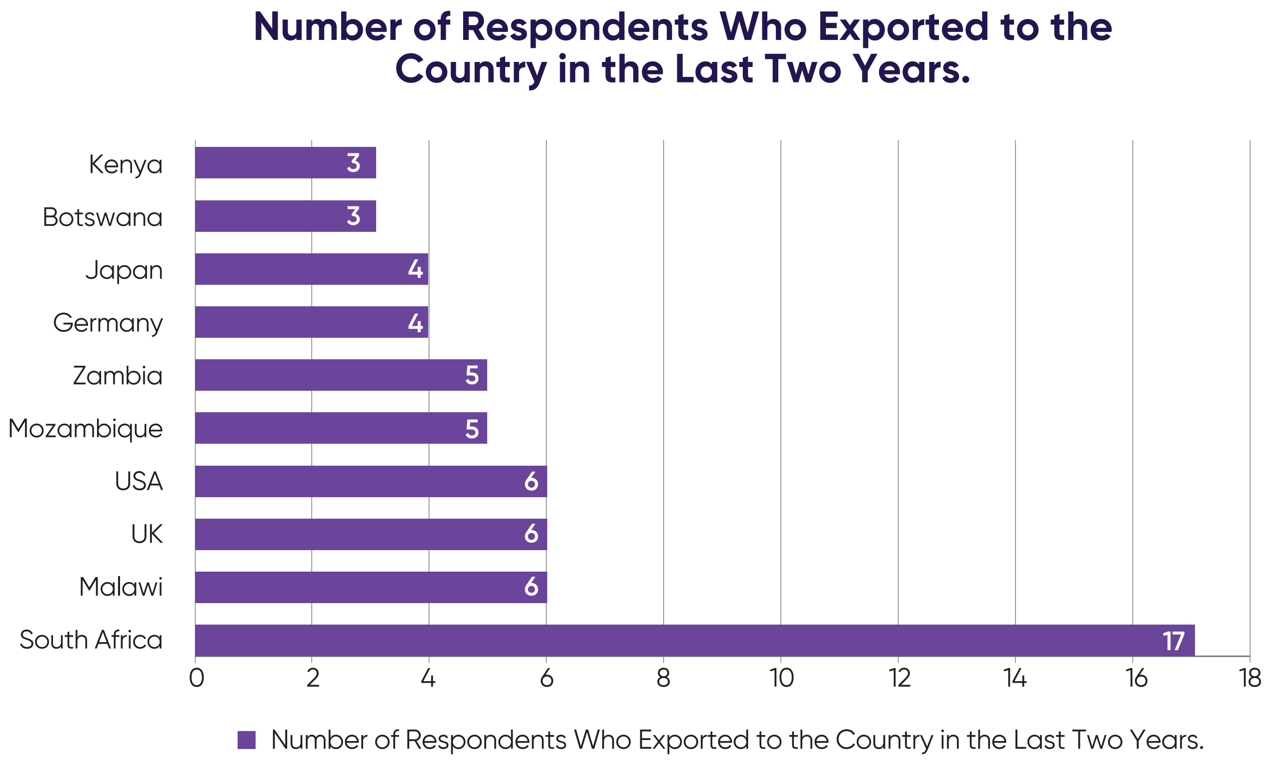


Figure 6: Trading Partner Countries for CCIs Exports in 2024/2025

Source: Survey data, 2025

The graph points to dominance of intra-Africa and intra-Southern African Development Community trade. This could be due to easy accessibility of these countries as Zimbabweans do not need a visa to travel to Kenya, Botswana, Zambia, Mozambique, Malawi and South Africa. Key informants also indicated that trade is often facilitated by multilateral and bilateral trade relations. Trade with the United Kingdom, Germany and the United States of America is mostly facilitated through diplomatic institutions such as the British Council through their arts programmes, the USA Embassy in Zimbabwe and the Germany Embassy in Zimbabwe.

Trade in services tends to characterise most exports where Zimbabwean CCIs practitioners such as musicians travel to other countries to showcase their work.

4.3.3 Impact of Trade Barriers

Key challenges that were indicated as the major deterrents to international trade by key informants during interviews and by the survey respondents include lack of knowledge about exporting, limited market linkages, access and visibility in international markets; lack of exposure and connections to artists in foreign countries for collaborations and limited funding to pay for mobility. In addition, there is a lack of information about opportunities such as cultural exchange programmes, limited digital infrastructure and digital ecosystems as well as challenges with obtaining visas, especially for travel to the global north.

4.3.4 Trade in CCIs Goods

Trade in cultural goods is facilitated by the government's drive to create market linkages with the global markets. Zimbabwean artists frequently participate in major international art events, and the government consistently takes Zimbabwean artists to prestigious platforms like the Venice Biennale, where they are the only continuous African presence.

A key informant from the visual arts sector indicated that over the past five years, European markets for informal sales of trivial design artifacts and stone sculptures have shrunk, with some vendors relocating or having their makeshift setups destroyed due to land improvements and expansion. Smaller galleries have closed in Zimbabwe and those relying on local Non-Governmental Organisation funding and diplomatic collectors are affected by budget cuts. However, interest from new regions such as the Middle East and China has increased, alongside a boom in real estate and infrastructure development in Zimbabwe, which encourages some informal collecting. International cultural exchanges through festival programmes, regional expos, and arts fairs, have facilitated some exposure for artists to gain traction with their work regionally and internationally. On the other hand, some key informants pointed out that the invoicing and requirements by the Ministry of Finance where payment of export receipts are guided through exchange control declaration form 1 forms which are completed with their banks when declaration of exports provides for a 30% liquidation into local Zimbabwean currency from the foreign currency receipts upon all their exports. This is discouraging to CCIs who engage in international trade as they would have incurred costs related to production up to when they export goods and there is no state funded facility to finance export trade.

4.3.5 Trade in CCIs Services

Mode 1: Digital platforms providing CCIs services have grown despite internet challenges. These include social media platforms such as YouTube, Instagram, TikTok and Netflix which showcase varied CCIs products. In addition, online news and media platforms and online music consumption platforms have also grown. There are also hubs that support CCIs practitioners with digital skills development such as Matamba Film Labs which supports practitioners to develop skills in Virtual Reality (VR)/ Augmented Reality (AR)/Extended Reality (XR) and animation. The greatest challenge remains monetisation of content in the digital space. This poses a barrier to e-commerce and economic contribution of cross-border digital trade in CCIs services via online platforms. In addition, cross-border royalty collection is hindered by the absence of partnerships with Collective Management Organisations in foreign countries for cross-border and digital royalty collection. Youth uptake of digital technologies is much better compared to older generation CCIs practitioners

Mode 2: Consumer mobility into Zimbabwe specifically to consume CCIs services related to cultural tourism and events is affected by lack of high profile CCIs events and festivals. Zimbabwe used to boast of over 29 cultural events and festivals but most of them have either closed or reduced activities. Flagship international events such as the Harare International Festival of the Arts are no longer taking place and yet they used to attract huge numbers of visitors coming to consume Zimbabwean arts. In addition, cultural infrastructure gaps discourage visitors from consuming CCIs activities. The bulk of CCIs activities such as live performances shows, crafts fairs and visual arts exhibitions are hosted in spaces that are not primary use CCIs venues including pubs, clubs, open spaces and nightclubs. This affects the quality and branding of shows.

Mode 3: Zimbabwean face challenges with establishing subsidiary offices to provide CCIs services in other countries due to operational and regulatory barriers that are typically different or additional to those in Zimbabwe often requiring doubling up of capital, duplication of regulatory compliance documents and new systems among other things. However, informal trade around this mode is common, with Zimbabwean music promoters informally working in countries such as the UK.

Mode 4: refers to the temporary movement of natural persons (like employees or self-employed professionals) from one country to another to supply services. Key informants indicated that most

Zimbabwean CCIs practitioners supply services through this mode as they travel for international festivals, shows and exhibitions to other countries. However, most respondents indicated that Zimbabwean CCIs services suppliers face challenges with visa restrictions from some African and countries in other continents. In addition, funding for mobility is very limited and yet travel is very expensive.

4.4 Contribution to National Gross Domestic Product (GDP)

The Gross Domestic Product (GDP) for Zimbabwe was estimated at USD 45 719 million in 2024. The contribution of the CCI with regards to GDP was measured using the sector value added for the Arts, entertainment and recreation was estimated at USD 4. 9 million translates to 0.10 percent of Zimbabwe's GDP.

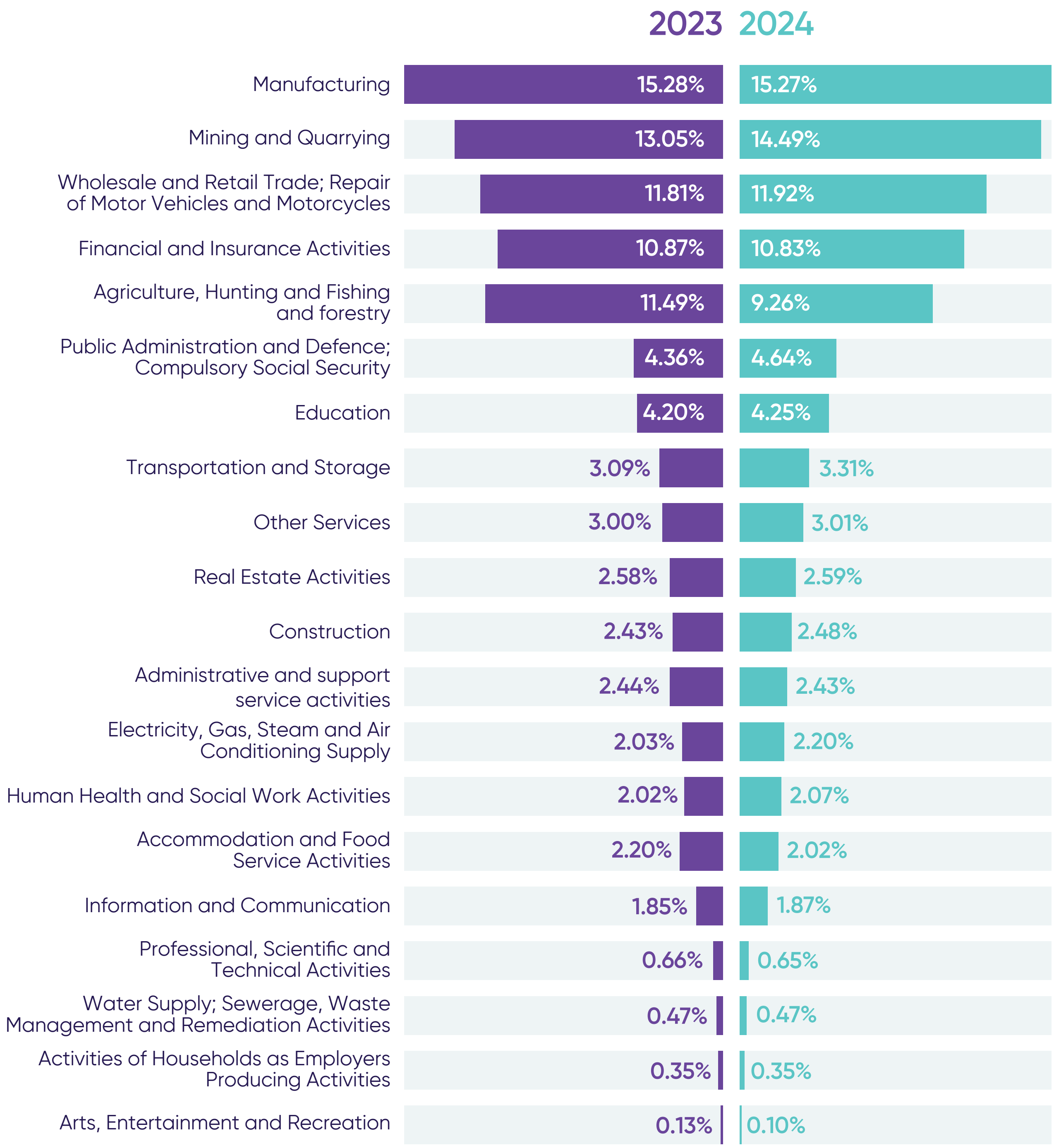


Figure 7: Percent Contribution to GDP by Industrial Sector (2023 and 2024)

A trend analysis of the sector's contribution over the years since 2019 showed a declining pattern in value added in USD terms. The sector contributed 0.52 percent in 2019, but the contribution declined in consecutive years reaching a low of 0.06 percent in 2022. This is due to increasing economic challenges faced by CCIs businesses and the impact of the Covid 19 Pandemic which hit the sector hard. The Pandemic disrupted the entire creative value chain for all CCIs domains including creation, production, distribution, and access. Banning of public gatherings affected income generation events such as live music shows, music album launches, festivals, art fairs and exhibitions leading to excessive loss of income within the sector. This was aggravated by limited digital ecosystem support structures for monetisation of content in the digital space

The 0.1 percent shown in Figure 8 represents the share of Gross Domestic Product (GDP) attributable to the Arts, Entertainment and Recreation industry, classified in accordance with the International Standard Industrial Classification of All Economic Activities (ISIC), Revision 4. In absolute terms, the industry contributed 4.9 million to the total GDP of 45,719 million. This corresponds to a percentage contribution of 0.1 percent of total GDP. The figure therefore reflects the industry's proportional contribution to overall economic output, rather than a different measurement or summary statistic.

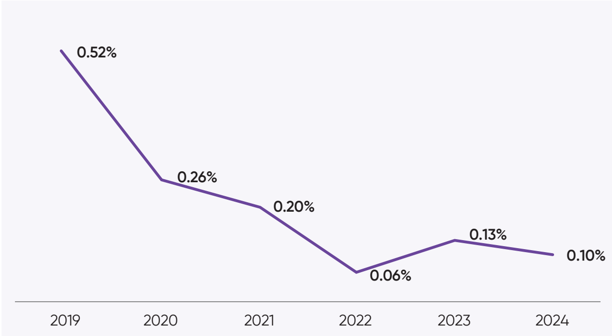


Figure 8: Trend in GDP contribution by the Arts, Entertainment and Recreation Industry

Considering the CCI domains which do not fall directly under the standard Arts, Entertainment and Recreation classification, the study reviewed that CCIs contributed USD 2,707.7 million in 2024 which was approximately 5.92 percent of the GDP. The domains which had the highest contribution to value added were Television programming and broad casting activities (USD 1,413.2 million) and Book publishing at USD 394.05 million. Table 4.3 summarises the value added by domains in ISIC revision 4.

Table 7: Contribution of CCIs to GDPin 2024

CCI Domains and Description (ISIC 4)	Notes	Turnover (USD millions) in 2024	Intermediate Consumption 35% in million USD in 2024	Value Added in Million USD in 2024
3211 Manufacture of jewellery and related articles		2.00	0.70	1.31
3220 Manufacture of musical instruments		0.00	0.00	0.00
4649 Wholesale of other household goods	1	29.30	10.27	19.07
4761 Retail sale of books, newspapers and stationary in specialized stores		10.40	3.66	6.79
4762 Retail sale of music and video recordings in specialized stores		-	-	-
4774 Retail sale of second-hand goods	2	0.70	0.25	0.46
4791 Retail sale via mail order houses or via Internet	3	0.50	0.18	0.33
5811 Book publishing		606.20	212.18	394.05
5813 Publishing of newspapers, journals and periodicals		9.60	3.36	6.24
5819 Other publishing activities		3.00	1.05	1.95
5820 Software publishing		4.80	1.66	3.09
5911 Motion picture, video and television programme production activities		0.00	0.00	0.01
5912 Motion picture, video and television programme postproduction activities		0.30	0.10	0.18
5913 Motion picture, video and television programme distribution activities		-	-	-
5914 Motion picture projection activities		0.00	0.01	0.01
5920 Sound recording and music publishing activities		0.20	0.06	0.11
6010 Radio broadcasting		0.00	0.02	0.03
6020 Television programming and broadcasting activities		2,174.10	760.95	1,413.20
6312 Web portals	4	0.00	0.01	0.01
6391 News agency activities		0.90	0.32	0.60
6399 Other information service activities n.e.c.		852.50	298.38	554.13
7110 Architectural and engineering activities and related technical consultancy	5	-	-	-
7220 Research and experimental development on social sciences and humanities		1.60	0.57	1.06
7310 Advertising		56.70	18.84	36.85
7410 Specialized design activities	6	393.50	137.74	255.80
7420 Photographic activities	7	0.80	0.27	0.50
7722 Renting of video tapes and disks		-	-	-
8522 Technical and vocational secondary education	8	-	-	-
8530 Higher education		2.50	0.89	1.65
8542 Cultural education		-	-	-
9000 Creative, arts and entertainment activities	9	12.40	4.34	8.05
9101 Library and archives activities		-	-	-
9102 Museums activities and operation of historical sites and buildings	10	0.30	0.12	0.22
9103 Botanical and zoological gardens and nature reserves activities		3.10	1.09	2.02
Total		**4,165.70**	**1,458.00**	**2,707.72**

Notes:

1. Includes wholesale stationery, books, magazines and newspapers.
2. Includes retail sales of antiques. The code 4773 that includes "Activities of commercial art galleries, of antiques, activities of auctioning houses (retail)" is not included because the scope of this code is too broad.
3. Includes only the purchases of cultural items
4. Includes only the production of cultural websites
5. Includes only architectural activities
6. Includes: fashion design related to textiles, wearing apparel, shoes, jewellery, furniture and other interior decoration and other fashion goods as well as other personal or household goods '- activities of graphic designers '- activities of interior decorators.
7. Distributive activities related to photography (wholesale and retail) are insufficiently disaggregated within the CPC as they are combined with 'Optical and precision equipment'. Thus, these codes were thus omitted from cultural domains.
8. Includes only cultural activities in education
9. Includes activities of sculptors, painters, cartoonists, engravers, etchers etc, and restoring works of art such as paintings etc. Includes activities of individual writers and independent journalists. Includes production of live theatrical presentations, concerts and opera or dance productions and other stage productions; Activities of groups, circuses or companies, orchestras or bands; Activities of individual artists such as musicians, authors and activities of producers or entrepreneurs of arts live events with or without facilities.
10. Excludes restoration of works of art and museum collection objects (in 9000).

5. CONTRIBUTION OF THE INFORMAL CCIs

The highly informal CCIs of Zimbabwe's contribution to the national economy, trade and employment creation cannot be easily assessed independently from the formal sector contribution due to the intricate connection between the two as highlighted in some of the analysis above. The level of formalisation within the Cultural and Creative Industries (CCIs) varies considerably across domains. Certain domains, such as cultural and natural heritage, tend to exhibit relatively higher levels of formalisation, while others, including performances, celebrations, and live events, are predominantly informal in nature. Pockets of formalised activity are also evident within the Books and Press domain, particularly among enterprises operating in newspapers and mainstream media. Similar patterns are observed in television and radio broadcasting, as well as in architectural and advertising services, where regulatory compliance and business registration are more common.

Limited incentives for formalisation remain a key constraint affecting CCI enterprises. As noted by Kiaga (2025), incentives play a critical role in encouraging businesses to transition into the formal economy. Findings from key informant interviews further suggest the presence of institutional mistrust among CCI practitioners, who often perceive formalisation as exposing them to burdensome regulation without commensurate benefits. Practitioners highlighted the multiplicity of licensing and regulatory requirements imposed by different government entities, including the Censorship Board and the National Arts Council of Zimbabwe (NACZ), alongside tax obligations and associated fees. At the same time, access to public funding and targeted support mechanisms remains limited.

Several respondents pointed to the potential value of a one-stop regulatory platform, possibly hosted by NACZ, as a means of streamlining compliance processes and reducing administrative barriers to formalisation. While the absence of formal regulation can raise concerns around accountability and consumer protection, the findings underscore the need for regulatory frameworks that balance oversight with ease of doing business. Achieving this balance is critical to fostering greater formal participation within the CCIs while supporting their growth and sustainability.

Figure 9: Formalisation Matrix for CCIs.

Illustration by Kiaga, A (2025)

As a result, one can only make inferences on the contribution of the informal sector, concluding that its contribution is highly significant as the sector is also highly informal.

6. KEY CHALLENGES AND OPPORTUNITIES FOR INFORMAL CCIs

Despite CCIs discipline nuances, Zimbabwe is endowed with diverse CCIs which face similar challenges. For instance, the fashion sector is potentially viable as a major raw material, cotton, is grown and processed in Zimbabwe. Key informants described fashion design as characterised by abundant creativity which has seen the country producing some internationally acclaimed designers. However, the sector lacks a robust supply chain, skills and technology required for success. A key informant described, "most fashion designers do not produce quality products that are competitive in the global market…even with great ideas, the products are not commercially viable as they follow trends and not identity."

The visual arts sector also functions with both formal and informal economies experiencing rapid growth alongside significant challenges caused by the struggling economy, financial difficulties, and limited government support. Zimbabwe has produced many professional visual artists who are gaining recognition nationally and internationally but dwindling support from the diplomatic community is affecting emerging and average talent.

The film and music sectors are also characterised by abundant talent but facing similar constraints such as limited access to resources and fit-for-purpose infrastructure and limited access to international markets. Below we summarise the general enablers and constraints for the CCIs in Zimbabwe.

Table 8: Summary of CCIs constraints and enablers affecting sectoral growth

Enablers Facilitating Growth of CCIs	**Constraints Affecting Growth of CCIs**
A rich and authentic cultural heritage from which to draw inspiration and abundant talent.	Limited access to finance
Digital technologies have democratised storytelling and facilitated interaction with consumers	Weak Infrastructure: This has limited CCIs to the periphery as auxiliary services to main industries such as gastronomy (restaurants) and pubs and clubs where people come to enjoy drinks which is the core purpose of clubs and pubs, and end up consuming music .
Growing support from the government through CCIs enabling policy and strategies	Skills Development Gaps: Especially business and digital skills.
ZimTrade, Ministry of Sport, Recreation, Arts and Culture as well Zimbabwe Tourism Authority and the Ministry of Women Affairs, Community, Small and Medium Enterprises Development facilitate participation of Zimbabwean CCIs in international platforms.	Regulatory frameworks scattered across different government ministries and high fees charged by regulatory authorities for different licences.
Increased appreciation of Zimbabwean CCIs in global markets for instance Zimbabwean visual arts are among the highest number of internationally represented artists on the continent, with their work showcased from top global galleries to various art capitals worldwide. Zimbabwean crafts are also highly appreciated in the global markets.	Unsustainable business models and incomes, for instance in the live music sector where most bands perform in clubs and are remunerated an average of $150 per show.

The CCIs sector has demonstrated resilience over the years with a lot of artist-driven initiatives. Many established artists have launched artist-run initiatives, galleries, and residency programs, such as Dzimbanhete (Chiko), Village Unhu, and Mbare Art Space, reflecting tremendous drive and initiative.	Limited access to both local and regional markets.
Resilience: Many established artists have launched artist-run initiatives, galleries, hubs, spaces and residency programs which keeps the sector vibrant.	Limited multi-sectoral, sectoral, regional and international collaborations which can catalyse creativity.
	Weak protection and monetisation of intellectual property online and offline.
	Limited access to technology such as the internet.

7. SKILLS AND TRAINING IN THE CCIs

The education and training space is characterised by formal and non-formal training programmes but is not adequate to support the emergence of dynamic CCIs. Formal training is offered by diverse tertiary education institutions and technical vocational institutions such as Polytechnics. Non-formal training programmes are offered in diverse forms such as workshops, seminars, incubators and accelerators among others, but these are largely fragmented initiatives by private players. Education, capacity enhancement and training is key to foster essential competencies in the CCIs workforce. Non-formal courses are not accredited by any authorities but are tailored based on the needs of practitioners. Usually, they are implemented by formally trained experts with practical and theoretical knowledge while some of the facilitators have gathered knowledge and expertise through practice. While some of these programmes are structured programmes and offered over a period exceeding three months' others are ad hoc programmes which are not very structured and often offered over a few days or weeks. Some of the programmes are delivered as in-person programmes, others are delivered online and as hybrid programmes combining both online and in-person delivery. Examples of such training include the British Council's SO creative e-learning programme conducted online with diverse modules cutting across diverse arts disciplines such as business planning, human resources, finance management.

Methods of obtaining skill being used on the current job

Survey data shows that skills development in the Cultural and Creative Industries (CCI) sector is predominantly informal, with most practitioners relying on self-teaching, mentorship, on-the-job learning and ad hoc workshops rather than structured vocational or formal education. While formal education contributes, it is typically combined with experiential learning, reflecting gaps in institutional training for creative professions. The strong presence of mentorship, volunteering and community-based learning highlights the sector's dependence on social networks, intergenerational knowledge transfer and practice-based skill acquisition.

Table 9: Methods of obtaining skills currently being used on the job

Method	%
Formal Education Pathways	31.9
Self-Taught Pathways	30.9
Mentorship-Based Pathways	22.4
On-the-Job Training Pathways	22.4
Ad Hoc Workshops / Seminars	16.0
Volunteering Pathways	13.0
Vocational / Technical Training (VCT)	6.0
Other / Miscellaneous	2.8
Total	**100**

Source: Survey Data, 2025

ILO (2025) notes that emerging technologies such as artificial intelligence (AI), blockchain and extended reality are changing how content is produced, distributed, exhibited and consumed, and how data is tracked, implying that workers in the CCIs are expected to reskill or upskill to make use of these new tools to their advantage. Digital space has also created a myriad of opportunities for storytellers through democratising story telling. However, digital skills are still very scarce in the sector with a few institutions such as Kay Media Africa, Magamba Network and Matamba Film Labs for Women offering these programmes. While the country is experiencing growth in internet service providers and mobile networks which are contributing towards growing connectivity, there has been limited effort in building a digital literacy among CCIs practitioners with fragmented initiatives by a few non-governmental organizations to support both basic and advanced digital literacy. These digital skills initiatives also suffer from inconsistent funding as they heavily depend on donor funding. The table below summarizes the nature of training available in the CCIs in Zimbabwe.

Table 10: Summary of the nature of training available in the CCIs in Zimbabwe.

Format	Provider	Delivery Mode	Scope of Coverage
Formal Training	Higher education institutions such as Zimbabwe College of Music, Polytechnics and Universities	Degrees, diplomas, certificates, Lectures, internships, short courses which are recognised nationally and standardized. These are consistently offered to practitioners.	Standard certificate, diploma and degree programme and in some cases short courses that are offered in partnership with professional institutions.
Non Formal Training	NGOs, Private providers such as Kay Media Africa, Matamba Film Labs, Magamba Network, Stimulus Africa, Savanna Arts Trust, Afrikera Arts Trust among others. Funding institutions such as British Council and Alliance Francaise	Workshops, tailored short courses, Workshops, Incubators, Accelerators, Workplace training-internships, mentorship and intergenerational learning (mostly for crafts and visual arts). Usually no standardisation and certification is provided and no national recognition. They are often once off with no consistency and infrequently offered.	Tailored programmes based on the needs of practitioners. Usually they are implemented by formally trained experts with practical and theoretical knowledge while some of the facilitators are respected experts who have gathered knowledge and expertise through practice.

8. CONCLUSIONS AND RECOMMENDATIONS

8.1 Conclusions

On the Economic Contribution of CCIs: The impact of CCIs on employment creation, trade and the GDP cannot be effectively estimated due to lack of harmonised national framework for identifying, measuring and reporting on Cultural and Creative Industries, as well as lack of dedicated classification codes for key CCI sub-sectors within national statistical systems. The impact of CCIs remains shrouded in economic statistics of sectors such as tourism (Heritage and cultural tourism) and manufacturing (Fashion) among others. CCIs also enhance the positive image of the country as Zimbabwean CCIs are appreciated in international markets. The potential for CCIs trade, especially trade in services is high and this can contribute towards economic diversification. However, trade barriers such as limited access to mobility resources, challenges in receiving international digital payments and weak technology to boost digital trade curtail the growth of this trade.

Although employment within Zimbabwe's Cultural and Creative Industries (CCIs) sector is predominantly informal, it is a major source of youth and women employment creation and most of the workers within the sector rely on their CCIs jobs for a living. The creative economy is heavily dominated by own-account workers or freelancers due to project-based financing. Most of the work is centred in cultural activities, with a smaller percentage in supporting jobs such as administration and accounting. Decent work deficits are significant, and work is precarious often exhibiting challenges such as limited coverage by labour laws, limited access to social security, limited access to formal financing, and generally lower and unstable incomes.

On informality: The Zimbabwean CCIs remain highly informal and yet innovative and resilient, experiencing rapid growth alongside significant challenges caused by the struggling economy and financial difficulties. The government has put in place an enabling policy and strategies, including a National Cultural and Creative Industries Strategy 2020-2030) to strengthen the vibrancy of CCIs.

However, CCIs are highly fragmented with most CCIs practitioners from similar domains working in silos. Cross sectoral collaborations are also limited. Data and statistical information on the sector from government and CCIs enterprises is scanty, making it difficult to fully understand its size, characteristics, needs and potential in the market. CCIs businesses struggle to attract financial resources, especially from private investors. No research and analysis of CCIs businesses and value chains have been conducted to inform support mechanisms.

A rich cultural heritage provides a source of inspiration but a key informant from music echoed that CCIs should be deliberate about creating an authentic narrative which is firmly rooted in that unique Zimbabwean heritage and strengthen their footprint in the market. Democratisation of storytelling through an array of social media platforms has opened opportunities for interaction with local and global consumers. However, there is limited specialisation as most businesses are active at all levels of the value chain with production companies and producers having to do everything from production to distribution. As a result, most of these companies fail to build sustainable businesses, missing out on the specialized technical expertise and revenue streams that come from focusing on specific areas such as production or distribution.

Key informants indicated that so far, the government has not offered clear tangible incentives to encourage CCIs to transition from informality to formalisation. Informal training programmes are not certified, there are no resources to capitalize CCIs. Ease of doing business also remains a challenge with practitioners complaining of high licence fees, administrative challenges for obtaining licenses as well as complex, fragmented landscape of regulation.

The bulk of CCIs activities such as live performances shows, crafts fairs and visual arts exhibitions are hosted in spaces that are not primarily used as CCIs venues including pubs, clubs, open spaces and nightclubs. This affects the quality of shows. In addition, a shortage of skills including business, technical and digital skills; limited access to technology due to affordability and challenges in receiving international digital payments affects the growth of the CCIs.

The country also has weak copyright protection mechanisms which weakens monetisation of content both in the digital space and offline. There is also little collaboration of Copyright Management Organizations (CMOs) for cross border royalty collection. For instance, CMOs have few reciprocal agreements with CMOs in other countries. As a result, not all consumption of copyrighted services abroad is documented and that is a risk to a trader whose services are consumed abroad.

8.2 Recommendations

Short-term recommendations

Informality:

- The government should consider streamlining licensing processes in the CCIs aiming to reduce red tape and lower regularisation costs to promote formalisation.
- The government should strengthen enforcement of copyright laws including recognition of related rights and collection of royalties in the digital space.
- The government should extend social protection to CCIs workers, coverage of CCIs workers by labour laws and create platforms to enhance social dialogue within the CCIs.
- The government should strengthen regulatory oversight over CMOs to improve their accountability, transparency and prevent mismanagement of funds.

Widening opportunities for CCIs:

- The government should establish a funding facility for the creative sector, paying attention to the unique needs of creatives, particularly women, to ensure equal access to financial resources and support.
- CCIs businesses should conduct research to understand the CCIs market paying close attention to statistics on consumption patterns, the preferred content, spending capacity/buying power, and how CCIs markets can be reached. This will inform marketing strategies that effectively tap into the local, African and global markets.
- The government should create an enabling environment for CCIs through effective IP protection and monetisation mechanisms, public funding as well as provision of fit-for-purpose infrastructure.
- CCIs businesses should co-create unique products integrating arts and crafts into the tourism value chain to promote synergies with sectors such as tourism which helps to market Zimbabwean culture to visitors.
- CCIs should undertake cross-sectoral collaborations by exploring possible partnerships with other fields like health, technology and agriculture sectors to drive innovation.

Skills Development:

- CCIs civil society organisations, education/training institutions and the private sector should invest in capacity enhancement initiatives, including programmes that offer creative enterprise skills, innovation, hands-on and industry-specific technical and production training for CCIs.
- The government should accredit informal training through recognition of prior learning, validation of non-formal training, linking informal to formal qualifications and foster public-private collaboration on skills development in creative digital areas.

Inclusion

- The government should enforce gender-sensitive policies, implement targeted capacity building, networking, and financial support for women in CCIs.
- Funding organisations and the private sector should prioritize programmes that enhance the capacities of women around business skills, leadership, digital tools,

marketing, and e-commerce to strengthen women's creative enterprises and help them access larger markets and improve the visibility of their work.

Medium-term recommendations

Evidence-based policymaking:

- Government and multilateral organisations such as UNESCO should capacitate ZimStats to produce national accounts with detailed data for CCIs using the definitions and statistics frameworks for CCIs such as the UNESCO Framework for Cultural Statistics (2009 recently updated at the end of 2025) or a localised definition and framework for evidence-based policymaking.
- The government, investors and private sector must conduct sector-specific studies to understand CCIs informal economies by domain, focusing on drivers, perceptions, and gender factors, which are essential for developing effective formalization strategies across various domains.
- The government should enable policy coordination and harmonized governance of CCIs across different ministries under which CCIs fall such as education, tourism, information and communication technologies, small to medium enterprises and unlock investment opportunities within CCIs through a CCIs interministerial taskforce.
- Implementing a "one-stop shop" for artists to access resources, regulatory support, and services can reduce fragmentation.

Opportunities for CCIs businesses:

- The government should engage in negotiations for ease of visa restrictions to enable mobility of Zimbabwean artists on the continent and internationally.
- The government should consider investing in diverse pathways to unlock market access including strengthening the CCIs distribution ecosystem linked to other sectors of the economy such as tourism; digital promotion of Zimbabwean CCIs, investing in CCIs distribution infrastructure as well as facilitating regional and international collaborations.
- CCIs practitioners should strengthen collaborations with like-minded institutions, the diaspora, private sector allies and investors to improve access to global platforms for content distribution while nurturing the invaluable opportunities for content distribution within Zimbabwe such as schools.
- CCIs businesses should leverage the Zimbabwean diaspora and institutions such as ZimTrade to provide market intelligence, identify global opportunities and capacity building for small-scale creative enterprises to facilitate access to regional and international markets.
- The government should initiate public-private partnerships to foster digital Integration and e-commerce through creation of localised digital platforms and e-commerce solutions which allows creators to reach international markets.

On skills development

- Encourage collaboration among education, CCIs, and private sectors in designing relevant skills development curricula in creative digital, entrepreneurship, business, and technical fields standardized training and professional certification.
- The government should commission baseline skills audit research covering technical, digital, and business competencies across CCIs domains like film, visual arts, music, and fashion to effectively address skills gaps in the CCIs.
- While AI is key, the use of generative AI should not replace human creative industries and as such, the government and players within the CCIs should continue to support talent development and capacity building of emerging and established artists.

Long Term Recommendations

On Informality:

- Arts associations should seek legal authority for collective bargaining or consider collaborating with informal sector associations and trade unions that do have this mandate. This will enable them to negotiate minimum pay standards including for independent contractors and address precarious work and ensure fair compensation for cultural workers.
- The government should implement social security nets specifically designed for freelance creative workers.
- The government should align labour laws to include protection for non-standard work arrangements common in CCIs, such as gig work, freelance and project-based contracts while providing tax incentives such as tax breaks, decent working space with access to digital technology

On opportunities for CCIs

- Local governments should revitalise existing cultural infrastructure and create new spaces such as creative hubs and creative clusters to reduce operational costs and provide a physical space for informal businesses for a sustainable creative ecosystem.
- The private sector should promote financial inclusion for CCIs through providing tailored financial packages with flexible terms that recognize intellectual property as collateral.
- Leverage public private partnerships to catalyse private sector investment in CCIs through enabling a favourable investor environment with incentives such as tax credits.

Gender equality

- Conduct regular data collection, monitoring and evaluation on gender equality and diversity in the CCE to support evidence-based policymaking.
- Policymakers, investors and financial institutions should support and advance intentional financial inclusion

9. REFERENCES

Boyle, S. and Joham, C., 2013. The informal economy and the arts: A two-country perspective. The Journal of Arts Management, Law, and Society, 43(3), pp.153-166.

Chen, Ying, "Reshaping Space: Informal Arts Engagement as Social Practice" (2022). Graduate Liberal Studies Theses and Dissertations. 8.

https://scholar.smu.edu/simmons_gls_etds/8

Choi, J., Dutz, M.A. and Usman, Z., 2020. The future of work in Africa: Harnessing the potential of digital technologies for all. World Bank Publications.

Dinardi, C., 2020. Re-thinking the creative economy through informality and social inclusion: changing policy directions from Latin America. In Cultural Industries and the Environmental Crisis: New Approaches for Policy (pp. 79-93). Cham: Springer International Publishing.

Eveleigh, M. 2013. Research Paper. "Arts & Culture Stakeholder Research, Funding Analysis: Modes of Engagement. https://africalia.be/assets/files/ZIM-ARTS-CULTURE-FUNDINGSTREAMS.pdf

ILO. 2025. Innovative approaches to addressing informality and promoting the transition to formality for decent work, https://www.ilo.org/sites/default/files/2025-04/ILC113-VI-AP-FORMALIZATION-%5B250131-003%5D-Web-EN.pdf

Government of Zimbabwe. 2020. "National Cultural and Creative Industries Strategy 2020-2030." https://nacz.co.zw/wp-content/uploads/2024/07/NATIONAL-CULTURAL-AND-CREATIVE-INDUSTRIES-STRATEGY-1.pdf

Machemedze, R. ed., 2018. Informal economy and social vulnerability in Zimbabwe. Friedrich Ebert Stiftung Zimbabwe.

Magidi, M., 2024. De-industrialisation, Urban Governance Challenges and Deteriorating Urban Infrastructure in Norton, Zimbabwe: Is the Town Ruralising?. In Secondary Cities and Local Governance in Southern Africa (pp. 255-269). Cham: Springer International Publishing.

Magidi, Martin & Mahiya, Innocent. (2020). Rethinking training: the role of the informal sector in skills acquisition and development in Zimbabwe. Development of Southern Africa. 38. 1-15. 10.1080/0376835X.2020.1799759

Magidi, M. (2022). The role of the informal economy in promoting urban sustainability: Evidence from a small Zimbabwean town. Development Southern Africa, 39(2), 209–223. https://doi.org/10.1080/0376835X.2021.1925088

Majachani, F., Wangusa, A. and Makochekanwa, A., 2024. Baseline survey on the state of informality in the cultural and creative sectors in Zimbabwe.ILO.

Zhou, H. and Pindiriri, C., 2015. Informal sector labour demand: Evidence from Zimbabwe's urban informal metal sector. Botswana Journal of Economics, 13(1), pp.26-39.

Zimbabwe National Statistics Agency (ZIMSTAT). 2019. Labour Force Child Labour Survey Report. https://www.zimstat.co.zw

Website: cfcafrica.org