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# BARAZA MEDIA CREATIVE SECTOR RESEARCH

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## FINDINGS REPORT



September 2022



## Executive Summary

The creative economy has been defined as an important, integral economic resource within a nation. It's the umbrella under which art, architecture, film, television, music, poetry, sculpture, and writing exist. Kenya's creative economy, according to this study, is a vibrant one, brimming with talent and possibility, especially when looked at through the opportunities it affords to the youth of the country.

This study sought to research the Creatives Industry in Kenya in order to highlight the challenges that hinder growth and development in the sector, identify their root causes and propose recommendations for reform both at program and policy levels. This project looked specifically at three sub-sectors of the Creative Economy in Kenya, namely:

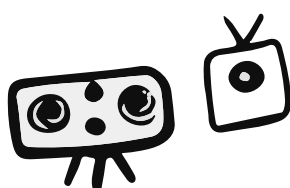
- **Audio-visual:** Film, television, radio and other Broadcasting
- **Performing arts:** Live music, Theatre and Dance
- **Publishing & Print media:** Books, press and other publications

The study report provides details on the industry and its related subsectors, including:

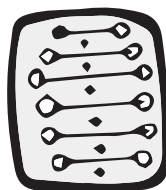
- An index of challenges hindering growth in the Kenyan Creative Scene;
- The commensurate effects of these prevalent challenges as pertains to the creatives' and country's social, economic, cultural, political and legal spheres;
- A historical tracing of some of the prevalent issues;
- Proposed policy and advocacy tenets for lobbying, so as to support and bolster the creative sector; and
- An insights summary of the data obtained throughout the research's duration.

Data was collected using three methods; Focus Group Discussions, Key Informant Interviews and an online Survey administered via Google Forms. Data was collected from respondents based in the Kenyan capital, Nairobi, where a large bulk of the creative economy exists and operates from. For this initial study, views were not sought from creatives in other parts of the country, something that subsequent studies can incorporate.

The body of research done for the creative sector in Kenya outlined in this report, including the East African and African contexts acknowledges the potential of the creative economy to be an important sector, contributing to the GDP of a country. Much of the industry remains fragmented, splintered, and run by independent individuals and micro-organizations operating unofficially outside of government taxation or influence. The lack of a structured unified body is reflected across the creative industries, which lessens the sector's ability to engage in any sort of meaningful dialogue with the government.



**AUDIO-VISUAL**



**PUBLISHING + PRINT MEDIA**



**PERFORMING ARTS**



## Summary of Findings

### *Sources of Income*

The study found that creatives in Kenya earn money from 3 main sources: Directly from consumers of their art, indirectly through intermediaries who collate or provide a channel for revenue, or through grants from donors and well-wishers. These sources cut across online platforms, and are available through the corporate sector, the local administration (county) structure as well as at national and international levels across the 3 sub sectors of the Creative Economy.

### *Use of Technology*

Regarding technology, the study shows that technology has become a major element of the creation and distribution of output. Many creatives rely on technology to varying degrees to carry out their daily work, and this comes with various challenges, chief of which is financial, with the costs of acquiring equipment, as well as the cost of ongoing access to services being a major factor. The study showed that using technology increased quality of output, making it easier and faster to make good quality content. Further, digital technology facilitates customer access, making it easier and faster to access customers. Also, despite technology being costly, using it helped to reduce the overall cost of the creative endeavor.

### *Community Led Approaches*

Creatives are involved in Community Led Approaches CLAs for collaboration and growth in the creative economy. Many creatives see CLAs as a place of training and creating wider awareness around social issues as well as a forum where they can give back and lend their knowledge and experience to others. CLAs have challenges, among them being the unwillingness by participants to engage as well as gatekeeping of information and resources by organizers and participants, leading to a lack of transparency, honesty and meaningful engagement. Success factors for CLAs revolve largely around quality, focus on providing excellent value to participants rather than trying to reach as many people as possible; smaller, more intimate groups are more valuable than large, disengaged ones.

### *Legal and Intellectual Property Matters*

In terms of knowledge of Intellectual Property (IP), it appears that most know what it entails and how it works for them. Regarding whether people feel they can benefit from IP, most creatives are less certain. Measures are proposed by respondents to help create awareness, including workshops and trainings.



## Recommendations

The Creative Sector in Kenya as currently constituted is relatively fragmented and unstructured. The study reveals that although a lot of work is currently happening, there is a lot of room for growth, innovation and progress. Creatives in Kenya face numerous challenges as well as opportunities in equal measure, and efforts need to be made to accelerate the creation of an enabling environment for success. Existing structures like CLAs can be leveraged and scaled up to cater to wider audiences in the creative space, providing the right mix of intimacy and reach in order to maximize impact.

Technology is a significant pillar in all subsectors of the Creative Economy. It is at the same time an enabler in terms of providing access to markets and opportunities, and a barrier in terms of costs and difficulty of access to the right tools and equipment needed. The industry has the potential to create self-employment opportunities for creators in the digital space as well as the new distribution and revenue streams.

A flourishing creative sector is one that allows the creatives to benefit economically from their work; this relies on effective systems and policies. As a basis for policy reforms, it is critical to have detailed knowledge and information about the sector. Entrepreneurship plays an important part in the development of the digital economy and the creation of new jobs. Policies are needed to build a regulatory environment in which businesses can thrive and fail, with easier access to finance for small innovative firms, lighter procedures for start-ups and lower failure costs. Policies can also help to promote more positive cultural attitudes towards risk.

In addressing the challenges observed, a critical success factor that will lead to better economic performance of the subsector and better policies. In particular, in training across different areas, the businesses in the sub sector need to be made aware of the importance of registering their works and sharing business data with relevant organizations. In addition, training is also required to improve entrepreneurial skills and make creatives more aware of their rights and opportunities to prevent exploitation. Further, a lot of collaboration is required between the creatives themselves, institutions and the government in order to create an enabling environment within the subsector.





## Table Of Contents

<b>Introduction</b> .....	<b>7</b>
<b>Findings</b> .....	<b>8</b>
Economic Models in existence for Kenyan Creatives .....	8
Perspectives on Use of Technology .....	13
Involvement in Community Led Approaches .....	17
Legal and IP Knowledge .....	21
<b>Summary and Recommendations for Policy</b> .....	<b>24</b>
Strengthening Structures .....	24
Leveraging Technology .....	24
Growth Opportunities .....	25
Policy Recommendations .....	26
Considerations for the future .....	32
<b>References</b> .....	<b>27</b>
<b>Appendix:</b> .....	<b>30</b>
Proposed/Sample Training and Capacity Building Program .....	30



## List of Acronyms

- ARIPO** – African Regional Intellectual Property Organisation  
**CODESRIA** – Council for the Development of Social Science Research in Africa  
**CAK** – Communications Authority of Kenya  
**CAGR** – Current Annual Growth Rate  
**CLA** – Community Lead Approaches  
**DTT** – Digital Terrestrial Television  
**FSD Kenya** – Financial Sector Deepening Kenya  
**GDP** – Gross Domestic Product  
**GIZ** – Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH  
(German Development Agency)  
**IP** – Intellectual Property  
**KBC** – Kenya Broadcasting Corporation  
**KECOBO** – Kenya Copyright Board  
**KFCB** – Kenya Film Classification Board  
**KIPI** – Kenya Intellectual Property Institute  
**KNBS** – Kenya National Bureau of Statistics  
**KSPCA** – Kenya Society for the Prevention of Cruelty to Animals  
**MSME** – Medium, Small and Micro Enterprises  
**SME** – Small and Medium Enterprises  
**UNCTAD** – United Nations Conference on Trade and Development  
**UNESCO** – United Nations Educational, Scientific and Cultural Organization  
**WEF** – World Economic Forum  
**WIPO** – World Intellectual Property Organisation





## Introduction

WYLDE International was engaged by Baraza Media Lab to undertake research on the Kenyan Creative Economy: Challenges hindering Growth and Development. The study was done for the purpose of exploring the challenges faced in the Kenyan creative sector, considering growth and development concepts involved, their impacts, limits and recommendations within the following contexts: social, economic, cultural, political, legal and historical. It is also of particular interest to creatives, organizations that support creatives, and local and national governments.

This study sought to research the Creatives Industry in Kenya in order to highlight the challenges that hinder growth and development in the sector, identify their root causes and propose recommendations for reform both at program and policy levels. This project looked specifically at three sub-sectors of the Creative Economy in Kenya, namely:

- 1. Audio-visual:** Film, television, radio and other Broadcasting – This covers any creative endeavor that is expressed in digital or audio-visual format, including social media content creation, videography, photography and other broadcast media in general
- 2. Performing arts:** Live music, Theatre and Dance – This covers all forms of creative work presented to a live audience or to individuals in person, including concerts, plays and other forms of performing art works in general
- 3. Publishing & Print media:** Books, press and other publications – This covers all forms of art presented in written or published form, including written works like books, magazines, newspapers and other forms of printed and published creative work in general

These sub sectors were chosen because they largely represent the creative economy in Kenya. From studies done highlighted in this study, as well as an assessment of the sector from a desk view perspective, these 3 sub sectors broadly cover the sector in Kenya.

The study report provides details on the industry and its related subsectors, including:

- An index of challenges hindering growth in the Kenyan Creative Scene;
- The commensurate effects of these prevalent challenges as pertains to the creatives and country's social, economic, cultural, political and legal spheres;
- A historical tracing of some of the prevalent issues;
- Proposed policy and advocacy tenets for lobbying, so as to support and bolster the creative sector; and
- An insights summary of the data obtained throughout the research's duration.

The study allows us to propose recommendations and a program to support the SMEs in the creative sector.



## Findings

For purposes of data reporting, we categorized all responses into columns depending on the sector where the columns represented are: Audiovisual, Performing Arts and Print & Publishing media. This was to ensure that the data captured for each survey question is captured as per sector.

### Economic Models in existence for Kenyan Creatives

Creatives in Kenya earn money from 3 main sources: Directly from consumers of their art, indirectly through intermediaries who collate or provide a channel for revenue or through grants from donors

- 1. Direct revenue** – This is in the form of client payments or purchases. For the Audio-Visual sector, this appears in the form of contracts from corporate or NGO clients or payments for work commissioned by clients such as photoshoots. Performing artists earn direct revenue through ticket sales for gigs or fees from commissioned work by corporate and individual clients. For publishing, direct revenue comes in the form of sale of books or articles, commissions by clients for written works as well as income from consultancy work from corporate and individual clients for work such as writing skills training or input on corporate digital or offline work.
- 2. Indirect revenue** – In all sectors, creatives are able to earn money through parties other than the direct consumers of their creative output; various types of intermediaries exist who provide platforms or structures that allow creatives to monetize their creativity and content. Audio Visual creatives use platforms such as Instagram and YouTube to monetize, as well as work with advertising agencies and production companies to sell their skills and content to a wider audience. Performing artists similarly earn revenue through organizers of events such as concerts and corporate functions to earn indirect income. For publishing, publishing houses such as newspapers, magazines and book publishers provide avenues for creators of written content to earn revenue
- 3. Grant revenue** – Donors exist across each of the three sectors, willing to fund creative output in its various forms. Various organizations, largely NGOs, provide a variety of grants for creation or curation of audio-visual, performed, or published creative content.







Table 2: How Kenyan creatives make money from their art

Audio Visual	Performing Arts	Print and Publishing
Monetized Content	Monetized Content	Monetized Content
Contracts	Fees	Consultancy
Events	Product placement	Clients
Commissions	Services	
Grants	Grants	
Sponsorship		
Merchandise		

Source: Survey Respondents

Table 3: Sources of revenue for Kenyan creatives

Audio Visual	Performing Arts	Print and Publishing
Ad Agencies	Fans	Clients
Production Companies	Event Organizers	Readers
Clients		Publisher
Media Houses		Grants
		Employer

Source: Survey Respondents



“Creatives in Kenya earn money from 3 main sources: Directly from consumers of their art, indirectly through intermediaries who collate or provide a channel for revenue or through grants from donors...”



## Opportunities and avenues available for creatives to make money

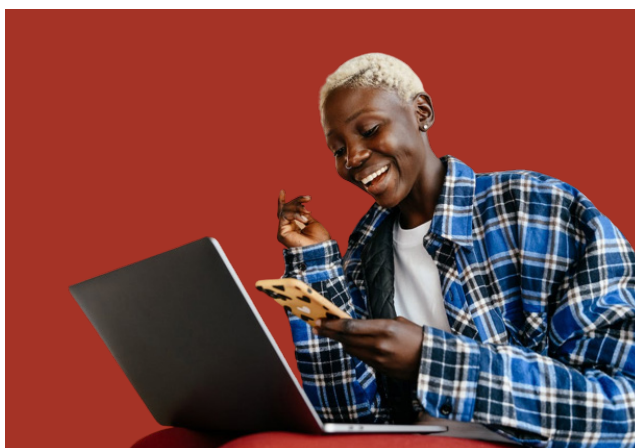
### Online Opportunities

From the data below there are a number of opportunities for Kenyan creatives to utilize the online space for the different industries represented in the study. The table below captures these opportunities per sector:

*Table 4: Online Money-Making Opportunities for Kenyan Creatives*

Audio-Visual	Performing Arts	Print & Publishing
Digital marketing, Influencing for brands	Advertising	Writing, short-form videos, newsletters,
Content creation	Grants and Funds	Virtual art galleries and NFTs
Selling licenses to their material.	Hustlesasa, Gig.co.ke	Content creation,
Upwork	Royalties from YouTube and music platforms such as Apple Music. Profits from sale of digital music.	Blogging/recorded performances/Podcasts
YouTube, Anchor, Marketing online	Online radio presenting and podcasting.	Competitive writing with monetized awards.
Streaming, Paywall	Facebook, Zoom, and YouTube and Instagram	Community based activities for niche groups
	YouTube, TikTok and other social media platforms for sales through views or merchandise sales	Web Development and Remote Consultations

*Source: Survey Respondents*



“There are a number of opportunities for Kenyan creatives to utilize the online space...”

## County-Based Opportunities

County based opportunities are the opportunities that exist for Kenyan creatives in the different counties in Kenya. From the data below, the creatives in the sectors represented; listed some opportunities they have been exposed to as Kenyan creatives. The table below captures these opportunities per sector:

*Table 5: County Based Money Making Opportunities for Kenyan Creatives*

AudioVisual	Performing Arts	Publishing & Print Media
Sponsored content creation	Mentorship, County events	Storytelling themed work
Film or theatre Festivals,	Market outreach	Writing supported content for magazines.
Engaging the County Governments and SMEs in the Counties	County cultural events	Opening an information center to curate Creative Economy ideas
Partnerships and collaboration with fellow creatives.	Bookings to shows	Youth projects and programs, county advertisement.
Youth Fund	Recording and broadcasting material packaged as podcasts or other digital content	Exhibitions
Mass screening	Grassroots participation in policy making and involvement	Events

*Source: Survey Respondents*

## Corporate Partnership Opportunities

When it comes to opportunities through corporate partnerships, the aim of this was to identify any opportunities that exist for creatives in the corporate space. The table below shows the different opportunities identified by the creatives in the study:

*Table 6: Corporate Partnership Money Making Opportunities for Kenyan Creatives*

Audiovisual	Performing arts	Print & Publishing Media
Marketing campaigns	Endorsements and partnerships	Artistic illustrations
Content creation for Marketing.	Consultancies	Writing of ads, promo copywriting
Commissions and training camps	Commissions	Workshops, Capacity building, and self-development type of influencing
Placements	Brand sponsorships for projects.	Partnership with recognized Creative Agency
	A voice talent could find great opportunity in lending their voice to a corporate entity to be utilized as its official voice in all their marketing content broadcasted in audio.	Advertised special projects and competitions
	Performance, Influencer sales	Product placement
		Sponsorship

*Source: Survey Respondents*



## International Opportunities

The aim of understanding where Kenyan Creatives stand with regards to international opportunities is to one; identify whether there are opportunities that exist for them on the international level and whether they are taking advantage of these opportunities internationally. The table below shows these opportunities as identified by the creatives from each sector who took part in the survey study:

*Table 7: International Money-Making Opportunities for Kenyan Creatives*

Audiovisual	Performing Arts	Print & Publishing
Influencing for brands	Major collaborations, Scoring in movies	Contemporary and cultural themed work
Film pitching, Film Festivals and Content creation	Exchange programs	Writing short comical skits or tragedies, writing ads for companies
Collaboration and exclusive art sales.	Commissions	Online Visibility of your craft like website, YouTube, Facebook, Google business
Medium (Online platform)	Performance in international stages e.g. South Africa	Grant offers and seed capital offers
Upwork (Online platform) and other such platforms	By posting their portfolio on international voice talent websites such as Voice123.com, talents get to expose themselves to work from various corporates in any part of the world.	Book fairs, merchandise, book into movie
Festivals, box office	Festivals	
Mostly by referral or linked in connection.	Collaborations in mega projects	

*Source: Survey Respondents*





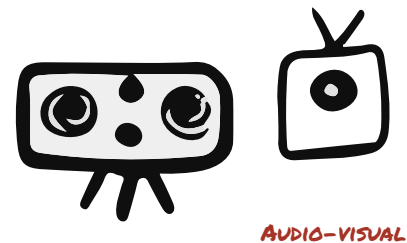
## Perspectives on Use of Technology

Technology has become a major element of the creation and distribution of output in the Creative Economy in Kenya. Today, many creatives rely on technology to varying degrees to carry out their daily work, and this comes with its fair share of advantages as well as challenges.

For the most part, respondents indicate that the biggest challenge is financial, with the costs of acquiring equipment, as well as access to services being a major factor. Also related to this is the learning curve challenge where people feel they need extra skill to take advantage of technology in their creative endeavors. Another factor is security, where technology, especially that which is internet based, is perceived to have inherent security challenges, limiting its functionality to the extent it can be protected.

### AudioVisual

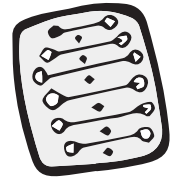
- Expensive cost of acquiring equipment
- Internet charges are high
- Learning and integration.
- Production
- Prone to hacking or even loss of data for cloud users.
- Skills
- Slightly expensive
- Some platforms are just difficult to use!
- Sometimes reliability
- The editing apps advance at a fast rate
- Too many subscription-based services mean higher running costs



### Performing Arts

- Internet algorithms are limiting (sometimes difficult to understand or fully exploit)
- Acquisition and access to equipment; capacity in technology
- Security threat, imitation/impersonation
- Machine crashes/breakages leading to loss of data
- Account hacked
- The necessity to regularly update software and keep up with the latest versions.
- Some devices like to project sound
- Purchase expense and maintenance





PUBLISHING + PRINT MEDIA

### Print & Publishing Media

- Current technology has created short forms of entertainment like short videos on TikTok which is detrimental, in my opinion, to a writer.
- Due to the fact that everyone has a platform, social media et al, as a creative, we are all fighting for the attention of the same market
- Connectivity.
- Cost and expense of software
- I hope cameras can be made in a way to be used by differently abled people, it is the only tool I can't handle on my own otherwise my vlogging game would have been on point.
- Insufficient amount of money during subscription for bundles to be used during the process.
- It can be a distraction sometimes and you lose your focus... There's so much going on.
- It is costly to keep updating to trends and growth.
- Lack of capital
- Lack of Technological support
- Need to learn more on desktop publishing
- Need to learn more short courses on publishing technology
- Not enough sites to expand Kenyan writers' broad scope so it makes it harder to be a writer.
- Reliable online platform to sell my art
- Skill. Requires constant learning of necessary skill.
- Technology is costly and in fact a huge investment and it keeps evolving

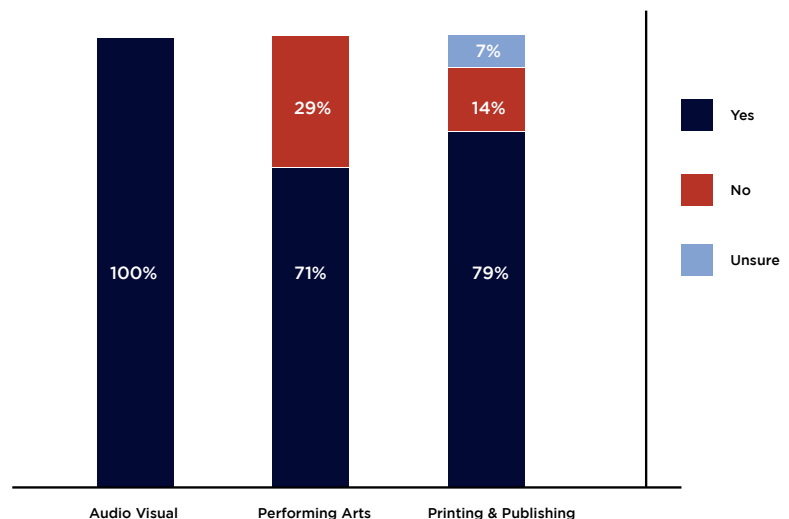
### Functionality of Technology

Respondents indicated that using technology increased quality of output. This is especially evident for those in the Audio-Visual space, with the general sentiment being that technology made it easier and faster to make good quality content. On the matter of access to customers, the general consensus is that technology facilitated customer access, making it easier and faster to access customers. On the issue of cost reduction, the feeling is that despite technology being costly, using it helped to reduce the overall cost of the creative endeavor.

In terms of costs,

**Figure 3: Does technology increase quality in the creative space?**

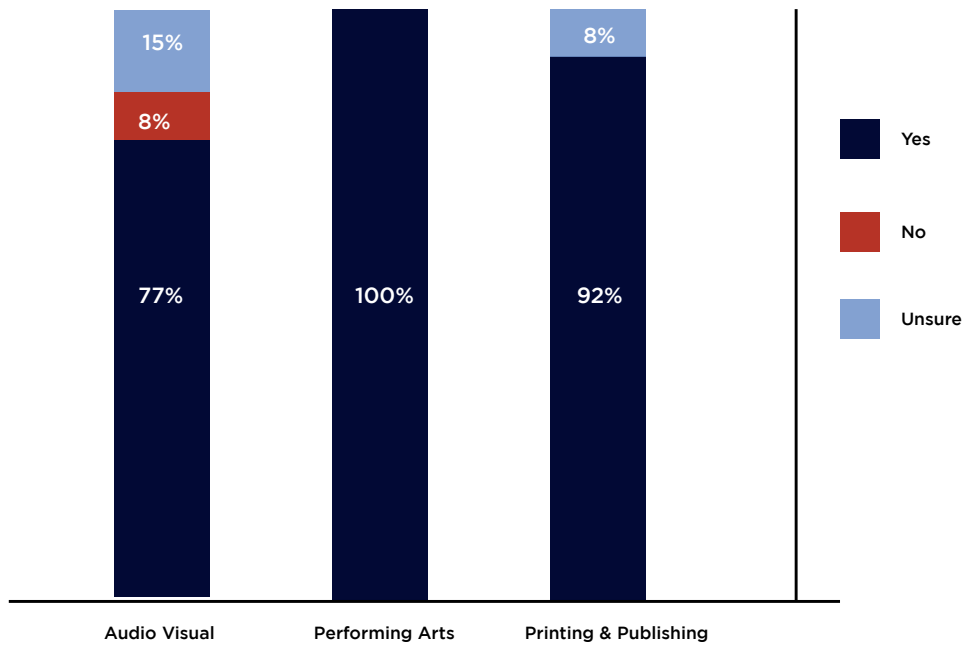
Source: Survey Respondents





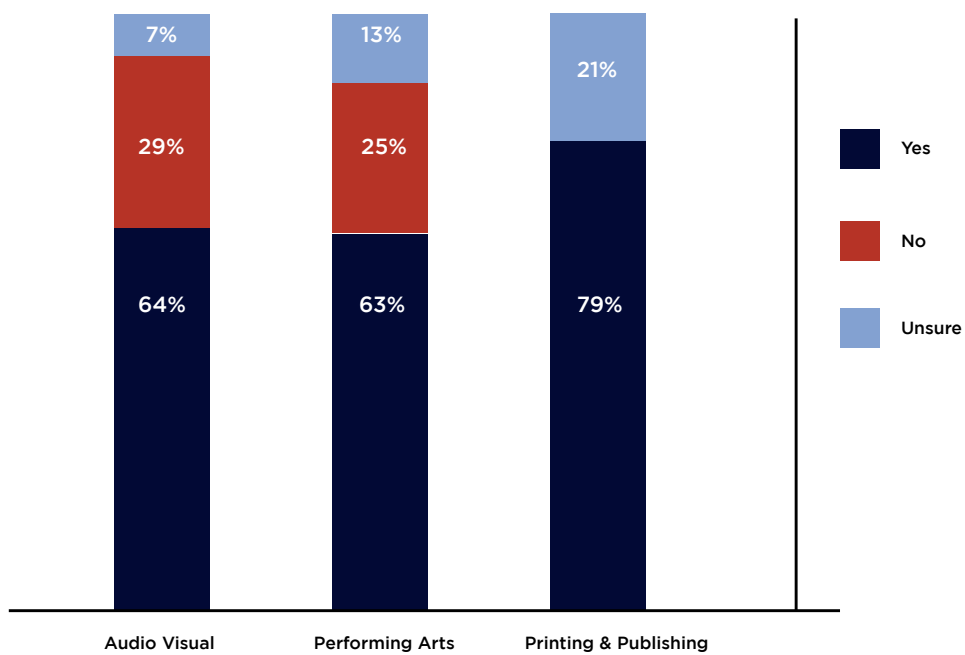
**Figure 4: Does technology increase your access to customers?**

Source: Survey Respondents



**Figure 5: Does technology reduce cost?**

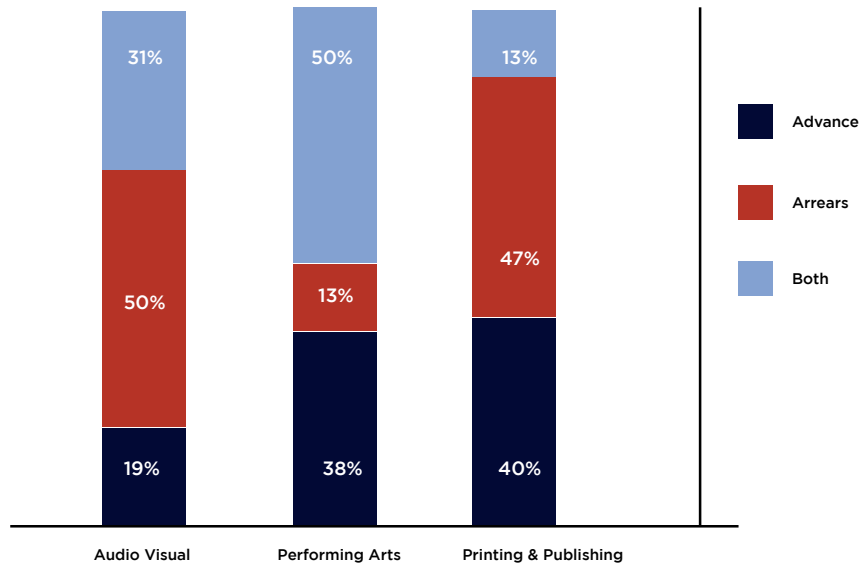
Source: Survey Respondents





**Figure 6: How are Creatives in Kenya paid for their work?**

Source: Survey Respondents

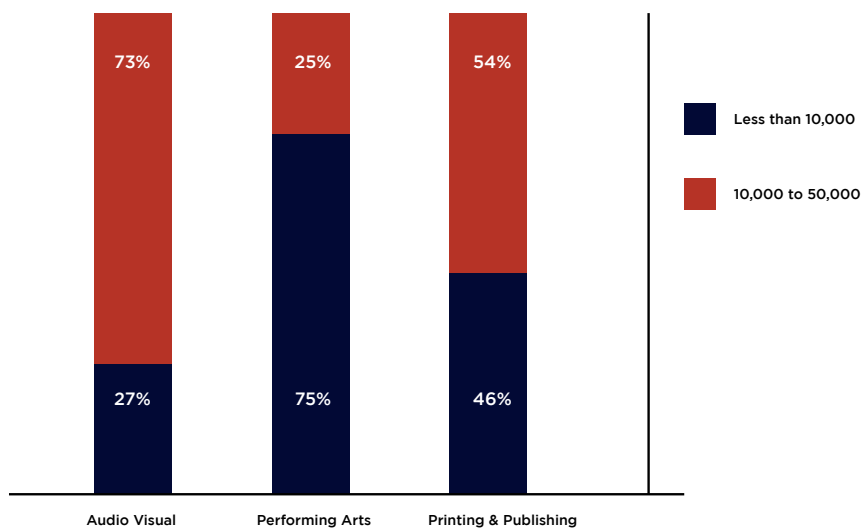


### Cost of Technology

In terms of running, AudioVisual seems to have the highest cost, with the majority paying up to KES 50,000 (approx. USD 500) monthly for access, including internet costs. Performing Arts seems to be the least expensive in terms of running costs. In terms of capital investment, it's apparent that AudioVisual art is capital intensive, with some equipment costing over KES 1,000,000 (approx. USD 10,000) to purchase. Print and Publishing is also relatively capital intensive, as compared to Performing Arts, where most creatives invest less than KES 50,000 (approx. USD 500) to get started.

**Figure 7: How much do you pay for online/social media monthly?**

Source: Survey Respondents

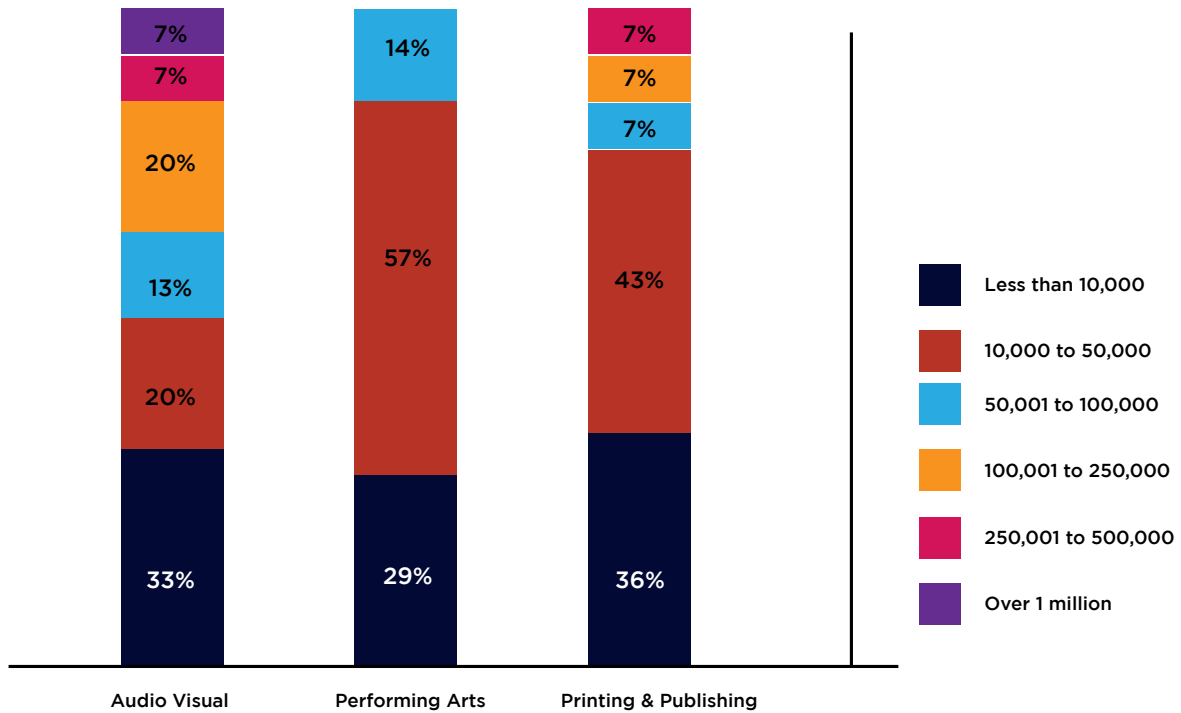






**Figure 8: How much do you pay for equipment & tools?**

Source: Survey Respondents



## Involvement in Community Led Approaches (CLAs)

Creatives are involved in Community Led Approaches CLAs to collaboration and growth in the creative economy. For some, the motivation is altruistic; a desire to help younger, less experienced players come up in the game, for others it's the desire to have a larger grouping to tap into and lean on. Many creatives see CLAs as a place of training and creating wider awareness around social issues as well as a forum where they can give back and lend their knowledge and experience to others.

CLAs have challenges all the same. Among them is the unwillingness by participants to engage and fully participate in the process. There's also a level of gatekeeping of information and resource by organizers and participants, leading to a lack of transparency, authenticity and engagement. Financial barriers such as lack of capital and high cost of set up lead some creatives to feel that CLAs are not very viable. Also, the lack of structure at various levels to scale up outcomes as well as disseminate the benefits of the process lead some creatives to find CLAs unsustainable.

Table 8: Motivation for involvement in CLAs

AudioVisual	Performing Arts	Publishing & Print Media
My beginning was not easy, I'd like to help those coming up	I want to see change; I want younger creatives to have an easy time creating their content and not having to worry about putting food on the table	The benefits to the community
The more professionals in the space, the better chance we stand to make the community relevant	The hope that one day something bigger will come out of it rather than seasonal support	It's my skill, therefore I want to utilize it nicely for the benefit of the world at large
Eagerness to learn and love for kids	I enjoy listening to people engage in conversation and discursive activity. I also believe in the intentionality of the historical process; thus archiving becomes a hobby for me.	Mentorship to the younger creatives
Uniqueness and community support	I love community work and the curiosity of learning and doing things together would say servant leadership	Transforming lives
Passion	Passion I have for the community transformation	Passion

Source: Survey Respondents

Table 9: Challenges of Community Led Approaches

AudioVisual	Performing Arts	Print & Publishing Media
Gatekeeping by other creatives and marketing agencies	Financial constraints	Arrogance
Skepticism to collaboration	Stereotypes from other members of the community	Debt related issues.
Production costs Language barrier	Trying to get permits from the authorities in charge	Lack of structure
Government support	1. Unreliable due to dependence on human attitudes and decisions 2. Unscalable due to lack of structures 3. No long-term benefits such as project collaborations	Financing and network
Lack of funds	1. Getting all stakeholders to meet in the same space.	Funding and training
	2. Conflict of interest between the students/researchers and the county governments.	Awareness, visibility, and relevance.
	Government support and restrictions also Covid	Lack of access to capital
	Rogue systems, unhealthy competition and inadequate resources	

Source: Survey Respondents



## Factors of Success for CLAs

Success factors for CLAs revolve largely around quality, focus on providing excellent value to participants rather than trying to reach as many people as possible. There's a sense that a smaller, more intimate engagement is more valuable than a large, disengaged group. Also, CLAs that contribute towards creatives becoming more financially viable are preferable to those that exist for socialization or exchange purposes.

*Table 10: Success Factors for CLAs*

<b>AudioVisual</b>	<b>Performing Arts</b>
Quality over quantity	Strategy and good teamwork
GoK involved	Not sure
Quality Service.	Involving the community in the art-making process
Willingness to collaborate, funds, time	Empowering them to make a living out of it
Quality content Financial resources.	1. Positive feedback on released projects 2. Attendance to events 3. Support on projects
Quality, quantity and accessibility	Commitment, time keeping,
Luck	The awareness of political shifts in power and their dynamics among members of the grassroots communities. The production of material (documentaries) by the curators and civic educators.
	Collaboration and dedication
	Value, Consistency and Creativity

*Source: Survey Respondents*





## Value addition of Community Led Approaches

Creatives value CLAs mostly for the skill addition potential they hold, both in terms of peer collaboration as well as training and external influence. In addition, CLAs provide an avenue to show case talent and creativity and to stay in touch with a crucial fan/consumer base with the potential for monetization.

*Table 11: Value Addition of Community Led Approaches*

<b>AudioVisual</b>	<b>Performing Arts</b>	<b>Print &amp; Publishing Media</b>
Growing our skills	Knowledge of key sector players	Opinion change
Several	Learning different strategies	Firsthand information
Through mentorship we get highly skilled personnel.	Changes communities' perspective on creative personnel	Access to various workshops, networking opportunities and an accessible and comfortable working space with very friendly and assisting staff members.
Access to more creatives and knowledge exchange	You get consistent support from fans	Collaboration
Unifying goals worldwide	Grassroots communities get exposed to knowledge of interpretation of the law from civic educators. Civic educators get in touch with the political realities challenging their understanding of communities.	Exploring new technologies
Showcase of the products	Beings in variety and resources	Talent and income generation
networking	Converging communities to a cause	Not applicable
		Youth engagement
		Guidance on book publishing and marketing
		Motivation

*Source: Survey Respondents*



## Existing Community Led Approaches

Some of the existing CLAs that creatives are aware of and participate in are:

- Artist villages
- Baraza Media Lab,
- Nairobi Design Week,
- SemaBox,
- Africa Podfest
- Guilds and associations
- Kenya Scriptwriters Guild
- Mentorship, Funding
- Tech community
- Community dialogues by civic education practitioners in select neighborhoods in Nairobi.
- Event planning
- Outreach programs and Self sponsored artist events,
- Community events
- WhatsApp group with loyal fans and supporters of the genre in Kenyan market
- 254 pawa
- Art Directors and Copywriters club,
- Behance.
- Kenya Writers Guild

## Legal and IP Knowledge

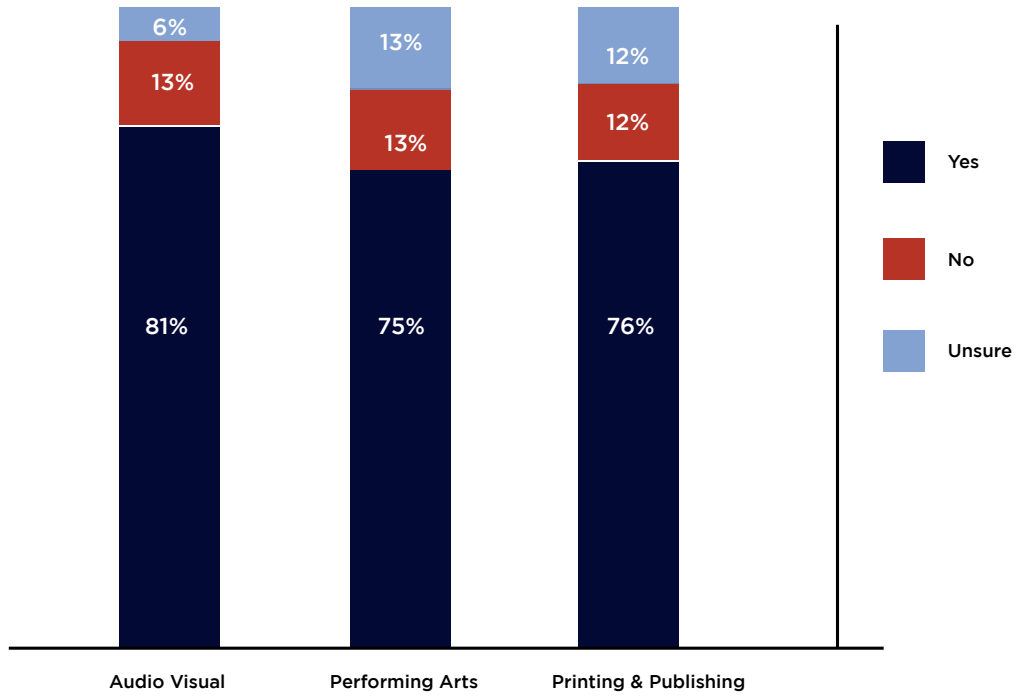
In terms of knowledge of Intellectual Property (IP), it appears that most artists across the three sub categories know what it entails and how it works for them. AudioVisual creatives are the most aware, with a greater percentage of them indicating so, with Performing Artists showing the lowest percentage of creatives who are knowledgeable about IP. Looking at whether people feel they can benefit from IP, most creatives either don't think so or aren't sure. This dynamic is especially acute in the AudioVisual subsector, where the vast majority of respondents don't think they benefit from their IP.





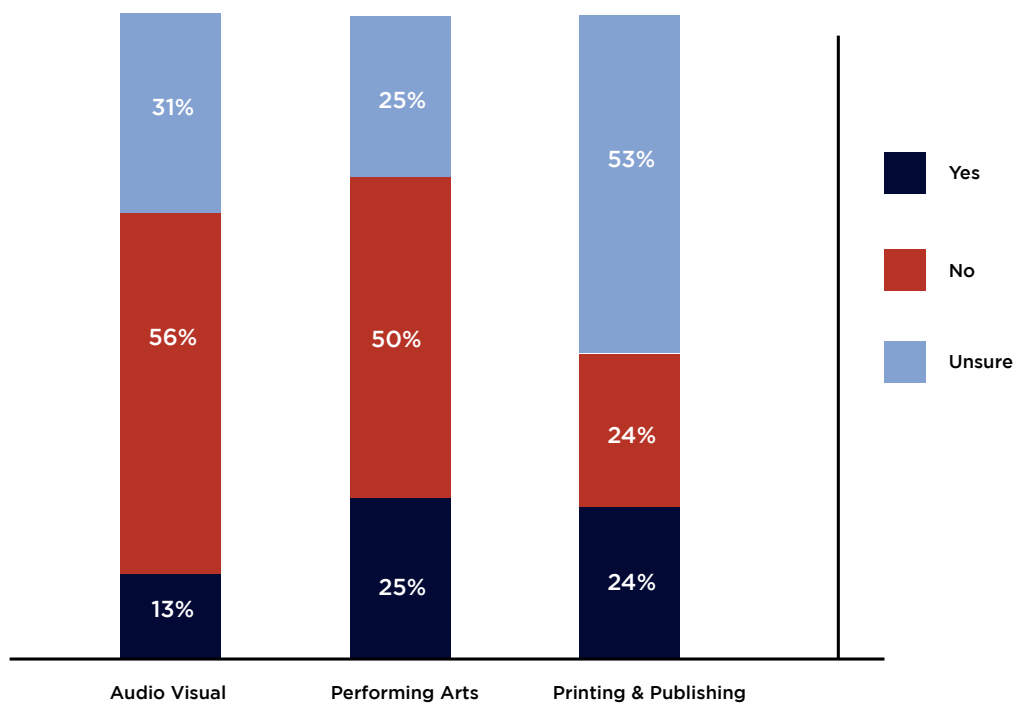
**Figure 9: Do you know about IP?**

Source: Survey Respondents



**Figure 10: Do you benefit from IP?**

Source: Survey Respondents



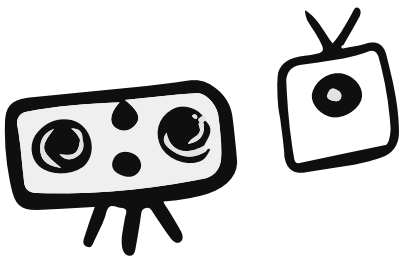


## Measures To Raise Awareness

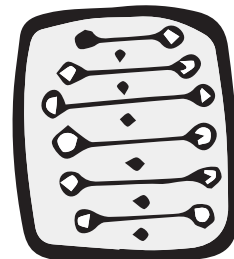
Measures to raise and increase awareness around IP have been suggested by creatives, and include the following activities:

- Legal workshops
- Trainings conducted by KECOBO and KIPI
- Articles from fellow creatives.
- More raising awareness sessions like one at Baraza
- Seminars
- Many creative forums in urban areas.
- Artists Rights Africa (ARA)'s ongoing virtual Masterclass on Copyright
- There's information being disseminated online by media industry players and the Kenya Copyright Board.
- Go down arts centre workshops on IP
- IPR bodies
- Public education
- Workshops
- Educative forums
- Corporates through CSR.

### AUDIO-VISUAL



### PUBLISHING + PRINT MEDIA



### PERFORMING ARTS



## Summary and Recommendations for Policy

### Strengthening Structures

The Creative Sector in Kenya as currently constituted is relatively fragmented and unstructured. The study reveals that although a lot of work is currently happening, there is a lot of room for growth, innovation and progress. Creatives in Kenya face numerous challenges as well as opportunities in equal measure, and efforts need to be made to accelerate the creation of an enabling environment for success. Existing structures like CLAs can be leveraged and scaled up to cater to wider audiences in the creative space, providing the right mix of intimacy and reach in order to maximize impact.

Awareness of available resources around learning and growth, as well as protection of IP, will help creatives maximize the economic benefit from their creative efforts. Also, awareness of potential direct and indirect sources of revenue for their craft, as well as potential supporters for their work in terms of sponsorships and grants will create extra value for artists across the board. Providing clearer structure around existing direct and indirect revenue sources, as well as awareness of opportunities locally and internationally will give creatives a leg up in improving their income generating potential

### Leveraging Technology

Technology is a significant pillar in all subsectors of the Creative Economy. It is at the same time an enabler in terms of providing access to markets and opportunities, and a barrier in terms of costs and difficulty of access to the right tools and equipment needed. An environment where creatives can leverage technology would add a lot of value. There are multiple ways that technology can be leveraged in this sector with the ability to use technology across the board from production to distribution:

- Using digital technology to cater to the needs of the consumer with different formats of the same content. There is great potential to use digital formats such as e-books, audiobooks, podcasts and video blogs just to name a few to push traditional paper books
- Access to global markets through digital distribution
- Targeting of higher return on investment markets
- Reduction of product and distribution costs
- Multiplication of revenue streams for creators and publishers
- Diversification of monetization strategies
- Use of social media to drive growth in different markets and different market segments
- Creation of audience loyalty
- Innovation across the value chain for better integration and product delivery





The industry has the potential to increase self-employment for creators in the digital space as well as the new distribution and revenue streams. With the need for digital platforms and channels, there is a demand for skilled developers and with the rise of social media as a platform, social media marketing, website development, financial payment gateway providers as well as shipping and delivery services are on increased demand. Online marketplaces such as shopping websites and applications are creating access to markets that did not exist before. There is an opportunity to leverage technology to streamline the existing value chain in the publishing industry while creating new players that will add value to the industry.

## Growth Opportunities

A flourishing creative sector is one that allows the creatives to benefit economically from their work; this relies on effective systems and policies. As a basis for policy reforms, it is critical to have detailed knowledge and information about the sector. Entrepreneurship plays an important part in the development of the digital economy and the creation of new jobs. Policies are needed to build a regulatory environment in which businesses can thrive and fail, with easier access to finance for small innovative firms, lighter procedures for start-ups and lower failure costs. Policies can also help to promote more positive cultural attitudes towards risk.

There exist immense opportunities in technology for the audio-visual subsectors, both in terms of online platforms and equipment and tools. Apart from film, television and radio the audio-visual sub sector has evolved due to the emergence of platforms such as YouTube, TikTok and Instagram, among others. This has also revolutionized the modes of distribution and increased the creatives access to the market. The evolution has been impactful and has disrupted the ways things are done in the industry. Some of these changes were not anticipated and have not been absorbed fully and therefore a lot of adjustments are required in terms of policies and reforms for the subsector to stabilize and perform at its best.

In addressing the challenges observed, a critical success factor that will lead to better economic performance of the subsector and better policies. Firstly, in advanced training across different areas, the businesses in the sub sector need to be made aware of the importance of registering their works and sharing business data with relevant organizations. In addition, training is also required to improve entrepreneurial skills, business acumen and make them more aware of their rights and available opportunities to maximize their output and prevent exploitation. Secondly, a lot of collaboration is required between the creatives themselves, institutions and the government in order to create an enabling environment within the subsector.



## Policy Recommendations

- Develop specific structures and programs to support the use of social media and other AudioVisual platforms and application
- Create a fund, administered by a multi-disciplinary, multi-sectoral team, domiciled within a government ministry to help support creatives financially
- Foster a suitable environment for investment in the sector by creating financial incentives for investors as well as suitable structures and vehicles for funding
- Benchmark with other countries best practices on engagement and management within the creative economy to ensure optimum output and creativity, as well as foster cross-border collaboration with players in the region and beyond to create a thriving ecosystem
- Develop legislation to provide legitimacy to the creative sector, allowing a legal framework that gives structure to the sector to maximize opportunities for creatives in the sector
- Standing funding allocations in each budget, with the funds domiciled under the Ministry of Sports, Culture and Heritage, with audits being availed to the public and creatives via the portal
- Research and Development for the sector being prioritized to allow for best practices in the sector to be identified and capitalized on for posterity
- Imposed restriction on minimum percentage of content produced in Kenya to spur growth in the sector and provide opportunities for creatives to apply their craft
- Create hubs and community forums backed by and hosted at local and national levels to provide structures for creatives to network, grow and collaborate

From the validation of this study it was clear that:

- The study has broken ground in a critical area of the Creative Economy in Kenya, helping to shed light on several important issues.
- It's necessary to observe that this is only a first step and that much more research is needed to inform strategy, policy and engagement in the sector in the future.
- Though trail blazing, this research study raises a lot of questions that future studies can fill in, and more study needs to be done along gender, class, religion, ethnicity and county lines for future studies to be representative and holistic.

See Annexe 2 for more information on the considerations for the future.



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## Appendix:

### Annex 1: Proposed/Sample Training and Capacity Building Program

The proposed program to support creatives should incorporate the following principles.

1. Creative path to profitable business  
Creatives need to be building a business around their creativity and they should see themselves not only as creatives but as business people offering a solution to a need that clients are willing to pay for.
2. Creatives remain as Creatives  
The program needs to allow creatives to remain as creatives while engaging business managers to support the work around the creatives. Each creative needs a support system which the program should encourage.
3. Creatives become more knowledgeable in the business of creativity  
Creatives need to be more knowledgeable around understanding the business aspects of their creative sector. They need to be aware of what makes money and how money is made alongside other business related aspects such as systems, financing, taxation, management, marketing etc.
4. Creatives increase their agency power  
The program needs to incorporate the ability of creatives to form networks that increase their power to negotiate and to lobby for better policies with all stakeholders.
5. Creatives collaborate in an ecosystem  
The program should respond to the research finding that creative succeed when they are working and marketing their products in an ecosystem with other creatives. Multiple creative forms are required in one location in order.

Area of Training	Details
Intellectual Property Appreciation	<ul style="list-style-type: none"> <li>• The fundamental of Intellectual Property and what makes your creative work valuable in the eye of the customer</li> <li>• Understanding the customer's needs and how to position your IP so that the customer pays for it</li> </ul>
Business Management Essentials	<ul style="list-style-type: none"> <li>• Awareness of the need for a business manager</li> <li>• Training creatives on how to run a business and how to think like business persons/service providers, beyond being creatives</li> <li>• Teaming creatives up with business partners and potential business opportunities</li> <li>• Taxation and how to ensure your creative business works within the tax jurisdictions</li> <li>• Training managers who can work with creatives on the business of creativity</li> </ul>
Marketing and Business Development	<ul style="list-style-type: none"> <li>• Training on how to market their services and brand to potential customers</li> <li>• Understanding of customer needs</li> <li>• Market creation activities such as supporting festivals or events that bring multiple creatives together</li> </ul>



<b>Area of Training</b>	<b>Details</b>
Social Media and Digital Presence	<ul style="list-style-type: none"> <li>• Training on how to utilise their online presence to grow their brands and attract more customers</li> <li>• Linkages with Online brands and influencers to help promote and grow their brands</li> <li>• Social Commerce</li> <li>• Digital distribution platforms</li> </ul>
Basic Financial Management	<ul style="list-style-type: none"> <li>• Training on how to manage cashflow and financial matters such as billing and taxes</li> <li>• Financial management activities and linkages with providers of financial services to help grow their financial thinking and capacity</li> <li>• Tax and Tax administration</li> </ul>
Community Engagement Strategies	<ul style="list-style-type: none"> <li>• Training on best practices for community engagement to help creatives collaborate better</li> <li>• Ongoing activities to create communities where creatives can continually socialize and collaborate</li> <li>• Unlocking the agency power of community</li> </ul>
Local Law and Intellectual Property Management	<ul style="list-style-type: none"> <li>• Training on the relevant aspects of the laws that apply to the creative economy, including Intellectual Property</li> <li>• Activities and forums to sensitize creatives on ongoing legal dynamics and Intellectual Property rights as they arise</li> </ul>
Coaching and Mentorship	<ul style="list-style-type: none"> <li>• Coaching for professional and technical knowledge</li> <li>• Mentorship for experience</li> <li>• Creativity area</li> <li>• Business coaching</li> </ul>
Other Aspects	<ul style="list-style-type: none"> <li>• Pairing Creatives with Creative Business Managers</li> <li>• A special tract for training Creative Business Managers</li> <li>• Creation of spaces, festivals where different creative expressions can interact with clients</li> </ul>



## Annex 2: Considerations for the future

This appendix allows any form of information that Baraza can derive from the Validation of the study.

### Key Points that came from the Validation Point

Future work in this area can look at/fill in various gaps as follows:

- Future work can look at platforms for creatives to contribute knowledge and ideas for policy, frameworks and legislature. Currently, there are hardly any forums or spaces for creatives to contribute towards the structures that support the industry as a whole, reviewing the possibilities would be a good area of work
- Future work can look at the dynamics of diversification of roles and the need for creatives to diversify even further within the subsectors for instance, Producers, Directors and Lead actors within the film industry. These dynamics affect the level of specialization and training creatives choose to engage in from early on in their careers and need to be explored comprehensively
- A deeper look into the success factors of the creative economies of other African countries would also be an important body of work for the future. For instance, what is behind the success of the film industries in Nigeria and South Africa, as well as our own home-grown industry commonly known as “Riverwood”.
- The impact and future of legal matters in the sector is worth a deeper look as well. Establishing the dynamics and level of training and preparedness of the legal profession for entertainment law, both as practitioner and judicial levels, cutting across all matters around creatives including intellectual property.
- As we look to grow appropriate structures to support the industry, it’s important to ensure adequate participation for posterity. The forums, teams and structures that will perpetuate as the industry grows must be continually evaluated to ensure they don’t become cartels that stifle the industry.



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**FINDINGS REPORT**

