



MAPPING OF NIGERIA CREATIVE INDUSTRIES:
REPORT OF LAGOS PILOT STUDY
(Music, Fashion, and Film)

November 2013



Federal Ministry
of Tourism, Culture
and National Orientation



NATIONAL BUREAU OF STATISTICS



Duration of Fieldwork

The fieldwork for this Pilot Study was conducted in Lagos from 27th August through 7th September 2013 (see appendixes for the clusters).

Project Consultants

Professor Emmanuel S. Dandaura	-	Team Leader
Professor Samuel A. Kafewo	-	SONTA
Mr. Michael M. Imohi	-	NBS
Dr. Austin Nweze	-	PAU
Mrs Martha Onyeajuwa	-	PAU

Methodology Scoping

Professor Emmanuel S. Dandaura	-	Team Leader
Professor John S. Illah	-	SONTA
Professor Ahmed Yerima	-	SONTA
Professor Samuel A. Kafewo	-	SONTA
Professor E. Biakolo	-	PAU
Dr. Austin Nweze	-	PAU
Mrs Martha Onyeajuwa	-	PAU
Mr L. Gambo	-	NBS
Mr. M.O. Salami	-	NBS
Mr. Michael M. Imohi	-	NBS

CONTENTS	PAGE
Title Page	1
Duration of Fieldwork and Project Consultants	2
Table of Contents	3
Preface	4
Acronyms	5
Executive Summary	6
Introduction	8
Statement of the Problem	8
What Defines the Creative Industries in Nigeria	9
Why Measure Creative Industries in Nigeria?	10
What is Measured in this Study?	12
Caveat Lector	13
SIC Codes	14
Methodology	15
Study Design	15
Findings	16
a) Gender Distribution	16
b) Marital Status	17
c) Relevant Manpower Trainings Undertaken	18
d) Ownership structure	18
e) Sector Distribution	19
f) Distribution of Creative Business by LGA	20
Profit from Creative Businesses	21
a) Average Earnings from Fashion	21
b) Average Earnings from Music	21
c) Average Earnings from Film	22
d) Average Earnings from Outside Nigeria	23
e) Non-economic Rewards	23
f) Sources of Patronage of Creative Businesses	25
Employment Pattern in the Creative Industries	27
a) Distribution of Individuals by Creative Businesses	28
Creative Business Expenditures	30
Contribution of Creative Businesses to the Economy	33
a) Gross Value Added	33
Findings, Observations and Recommendations	35
Note	37
References	38
Appendixes	39
a) Table of Clusters Studied in Lagos	40
b) Establishments Listing Frame	41
c) Households Listing Frame	101

LIST OF FIGURES

<i>No</i>	<i>Description</i>	<i>Page</i>
Figure 1	Gender Distribution in Creative Businesses	16
Figure 2	Gender distribution by Creative Sector	17
Figure 3	Marital Status and Relevant Trainings attended	17
Figure 4	Relevant Training Undertaken in the Creative Business	18
Figure 5	Ownership Structure	19
Figure 6	Urban/Rural Distribution of Creative Businesses in Lagos	19
Figure 7	Distribution of Creative Businesses in Lagos by LGA	20
Figure 8	Average Earnings from Fashion	21
Figure 9	Average Earnings from Music	22
Figure 10	Average Earnings from Film	22
Figure 11	Average Earnings from outside Nigeria	23
Figure 12	Non-economic Rewards	24
Figure 13	Categories of Non-economic Rewards	24
Figure 14	Sources of Patronage of Creative Businesses	25
Figure 15	Average Monthly Expenditure (Fashion)	26
Figure 16	Average Monthly Expenditure (Music)	26
Figure 17	Average Monthly Expenditure (Film)	27
Figure 18	Distribution of individuals by Creative Businesses	28
Figure 19	Sex Distribution by Business activities in Music	28
Figure 20	Sex Distribution by Business activities in Fashion	29
Figure 21	Sex Distribution by Business activities in Film	30
Figure 22	Expenditures on Raw Materials by Year	30
Figure 23	Expenditures on Power Supply by Year	31
Figure 24	Expenditures on Wages/Salaries by Year	32
Figure 25	Expenditures on other items by Year	32
Figure 26	Gross Value Added by Year	33
Figure 27	Gross Value Added by Sector	34
Figure 28	Gross Value Added by Sector by Year	34

PREFACE

The creative sector has proven to be a viable contributor to the economic development of nations, especially with consideration to the immense export potentials of the sector. Nollywood (the Nigerian film industry) is recognised as the second largest film industry in the world and Nigerian music, after conquering Africa, is generating conversation and growing interest across the world.

Despite its enormous contributions and potentials, the creative industry in Nigeria continues to maintain a relatively low profile in comparison to other economic sectors and this low profile is attributed to lack of verifiable data on the economic contribution, job creation and other macro economic indices of the sector.

Consequently, a stakeholder forum in July 2011 agreed unanimously that, in order to stimulate interest in the sector, grow its profile and aid policy making, it was imperative that an economic study (a mapping) of the Nigerian Creative Industries be undertaken to provide information on size, employment profile and other trends in the sector.

Thereafter, a Mapping Working Group was commissioned by the British Council to facilitate the mapping of the sector. The members of the Mapping Working Group were drawn from the Society for Nigeria Theatre Artistes (SONTA), Pan Atlantic University's School of Media and Communications and the National Bureau of Statistics.

Following a scoping of methodology in 2012, the mapping commenced with a pilot study of key creative industry sectors in Lagos from 26th August through 7th September 2012. The subsectors selected for this pilot were: Fashion, Film and Music. The decisions were made in recognition of Lagos as one of the hubs of creative activities in these three sectors which are themselves vibrant and high profile sectors and which we are confident, will provide data that make the case for further investment in the mapping process.

The British Council has over the years encouraged and facilitated series of mapping exercises through its various offices across the globe. We appreciate the support from the Nigerian project: Society of Nigeria Theatre Artists (SONTA), National Bureau of Statistics (NBS) and the Pan-Atlantic University, Lagos whose nominees served as consultants for the pilot project.

Connie Price
Country Director
British Council, Nigeria

ACRONYMS

CBN	Central Bank of Nigeria
EA	Enumeration Area
GDP	Gross Domestic Product
GVA	Gross Value Added (this is derived from a computation of the total income (TI), less total intermediate expenditures to produce output of the creative businesses (TE) (ie. $TI - TE = GVA$)
ISIC	International Standard Industrial Codes
LGA	Local Government Area (the third tier of Government in Nigeria)
NBS	National Bureau of Statistics
OECD	Organization for Economic Cooperation and Development. The industrialized countries of western Europe together with Australia, Japan, New Zealand, and the US formed this in 1961.
PAU	Pan-Atlantic University, Lagos
SIC	Standard Industrial Classifications
SNA	System of National Accounts
SONTA	Society of Nigeria Theatre Artists
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Scientific and Cultural Organization

EXECUTIVE SUMMARY

The contributions of the creative industries to the economic development of nations have become strategic, given the global economic viability of the sector. Results of mapping exercises conducted in many countries show that these industries continue to provide opportunities for investment, wealth creation and employment at a high percentage compared to other sectors. The United Nations for instance estimates the total value of world trade in this sector to be 3.4 per cent with a growth rate of 8.7 per cent.

In Nigeria, the creative industries have shaped economic growth and provided sustenance for a large number of people across the various social and economic strata. UNESCO for instance, has rated Nigeria's Home video industry as the world's second largest film industry with its potential annual revenue of N522 billion; over 2000 movies produced per annum and a captive viewing audience of over 200 million across Africa and beyond. However, to date, no broad empirical study has been conducted to establish the character, size and contribution of the cultural industry to the Nigerian economy.

This pilot study was therefore designed to gather empirical data that will provide the needed baseline information to facilitate a comprehensive country wide survey. It is believed that results of the comprehensive country wide survey will provide the platform to establish the character, size and contributions of Creative industries to the Nigerian economy as well as other non-economic gains.

The pilot study adopted a cocktail of research tools, which were necessary to cater for the complexity, scope, and the variables of the subject matter. It was necessary to use a variety of tools to ensure validity and reliability of data. A survey method was however used as the predominant data-gathering tool. The survey covered only fashion, film, and music clusters in the eleven LGAs canvassed in Lagos. A total of two thousand six hundred and forty (2,640) households were canvassed during the study while two thousand, six hundred and twenty four (2,624) copies of questionnaire were retrieved. One hundred and twenty four (124) enumerators were engaged in all. Five consultants drawn from the Society of Nigeria Theatre Artists (SONTA); National Bureau of Statistics (NBS) and Pan-Atlantic University, Lagos, provided technical input for the pilot study.

CORE FINDINGS

Analysis of the data generated during the pilot survey reveals the following:

Contribution to the Economy – Gross Value Added

Combined, the creative businesses surveyed contributed ₦2,547,300,490.26 during the reference period with 61 per cent of the total GVA derived from the Film industry alone. Fashion and Music contributed 26 and 13 per cent respectively. There was a steady rise in the GVA for both state and sector levels between 2010 and 2012.

Employment Size/ Number of Businesses

A total of six thousand and sixty (6,061) people are fully employed in the four thousand, one hundred and forty-two (4,142) creative business establishments surveyed in the sector. The majority (84%) of those employed in the sector are in Fashion, Film (9%) and Music (7%).

Exports of Services

The Average earnings from export of services stands at ₦451,029,254. This is about 17.71% of the current GVA of ₦2,547,300,490.26. Also, evidence of export services was measured through non-economic contributions of creative industries, which showed 55 per cent of recognitions/awards were international.

Skill sets within the sector

Relevant skills exist within the creative businesses since majority (70%) of individuals have basic training relevant to their creative businesses while 24 per cent possess advance skills.

Policy gaps and options towards addressing them

Creative business are not included as part of the major economic sectors of the Nigerian economy.

Relevant indicators of creative businesses are excluded from the routine national surveys of the NBS such as the quarterly GDP, NBS/CBN Socio-economic survey, Nigerian Labour Force Survey and the Employment Generation Survey as well as the national rebasing project.

Recommendations

Considering the valuable contributions and potentials of the creative businesses to the economic development of Nigeria, there arises an urgent need integrate these sectors into the newly anticipated sectors of the Nigerian economy through the on-going rebasing project of the economy in order to maximise their potentials.

It is recommended that immediate follow up comprehensive surveys be conducted in other zones of the country to enrich and verify the findings contained herein. This is crucial since the data collected for this pilot study being limited to Lagos state alone is not diversified enough to provide a valid statement on the performance and characteristics of the creative industries in the entire country.

1 INTRODUCTION

The contributions of the creative industries to the economic development of nations have become strategic, given the global economic viability of the sector. From results of mapping exercises conducted in many countries, these industries continue to provide opportunities for investment, wealth creation and employment compared to other sectors. In line with this, the UN estimates the total value of world trade in this sector to be 3.4% with a growth rate of 8.7%.

In Nigeria, over the years, the creative industries have shaped economic growth and provided sustenance for a large number of people across the various social and economic strata catalysing the process of national cohesion, identity diffusion and citizenship. For instance, UNESCO has rated Nigeria's Home video industry as the world's second largest film industry with its potential annual revenue of N522 billion; over 2000 movies produced per annum and a captive viewing audience of over 200 million across Africa and beyond. However, to date, no broad empirical study has been conducted to establish the character, size and contribution of the cultural industry to the Nigerian economy. This is necessary to inform policy, build systems, and maximize the sector's potentials.

In addition to its economic value, the creative industries are veritable tools for addressing the challenges of poverty alleviation; corruption, good governance, and growing insecurity, which have, remain threats to Nigeria's fledgling democracy.

STATEMENT OF THE PROBLEM

Nigeria's creative sector is broad and operates in a disconnected manner; organised as informal, non – formal and formal systems, with separate protocols. The key performers in this industry, often operate independently of each other, only occasionally synergizing their mandates under the auspices of national festivals, carnivals and cultural expos. The Federal and States cultural agencies act as the organs, but are most times unable to drive the various demands of the sector. In many ways, the state of legislation is weak, oversight is poor and facilitation for independent operators is haphazard. It is therefore difficult to assess the impact of the sector on the state's economy.

There is an equally worrying disconnect between this sector, as variously constituted, and the organized private sector. The latter is not able to evaluate, in statistical terms, the net potential of the cultural sector. It also tends to classify investment in the sector as high risk denying it the needed support from the organized private sector to drive its growth.

2 WHAT DEFINES CREATIVE INDUSTRIES IN NIGERIA

Mindful of the fact that there is no universal consensus on what defines the term “creative industries”, the study sought to establish what defines the creative industries in Nigeria. This was done through series of stakeholders meetings and focus group discussions with select strategic stakeholders across the country. While a national consensus is yet to be achieved, the preliminary delineation of the creative industries include the following:

- Home video/film/television and radio
- Performing arts (theatre, festival, carnival, dance, drama, stand up comedy)
- Music
- Visual art and animation (photography, painting, graphic design, drawing, sculpture etc)
- Tourism and hospitality (museums and monuments, cuisine, nite clubs, events managements etc)
- Arts and crafts
- Fashion and design
- Publishing (literature, book fairs, e-resources etc)
- Architecture (interior décor, landscaping etc)
- Advertising

The above delineation aligns more to the following definition proffered in the *2001 Creative Industries Mapping Document* of the Department of Culture, Media and Sports in the UK: “those industries which have their origin in individual creativity, skill and talent and which have potential for wealth and job creation through the generation and exploitation of economic property”

3 WHY MEASURE THE CREATIVE INDUSTRIES IN NIGERIA?

Poverty has been implicated as one of the core drivers of the spate of conflicts and violence in developing countries like Africa. This means that the quantum of human and material resources expended on these conflicts annually can be channelled into meeting the crucial aspects of Africa's development if the economies of the states are improved to meet the basic needs of its population.

The Nigerian economy is strategic to the development of many African nations. In 2007 Nigeria's GDP accounted for about 79% of the total GDP of West African States. A breakdown of the contributors to the Nigeria economy as provided by the National Bureau of Statistics include: Agriculture: 40%; Oil & Gas: 15.9%; Power: 7.9%; and Telecoms: 4.5% of the GDP. In the area of unemployment, the 2012 release by the NBS shows that, Nigeria recorded 24% adult unemployment and over 50% youth unemployment. The agriculture sector employs over 60% of the population while oil and gas employs less than 20, 000 workforces. The contributions of the creative industries to the GDP is yet to be captured because of the absence of verifiable statistical data on the sector.

Meanwhile the Nigerian creative industries continue to shape economic growth and provide sustenance for a large number of people across the various social and economic strata catalysing the process of national cohesion, identity diffusion and citizenship. Moreso, the creative industries have been identified as the fastest growing driver of world economy. Economic Regions like Asia that have embraced creativity as business generate significantly higher revenue with a corresponding greater security and economic stability. This is because the creative industries rely more on an unlimited global resource- human creativity.

As Nigeria contends with its security challenges and hopes to grow its economy from the 43rd (2008 figures) in the world to the 20th by the year 2020, it is important therefore to conduct a mapping of the creative industries sector so as to identify key aspects within the dynamics of the sector and provide the necessary facts that could improve decision-making, policy design, and other initiatives needed to grow these industries.

4 WHAT IS MEASURED IN THIS STUDY

The overall goal of this project is to establish the character, size and contributions of the creative industries to the Nigerian economy and other non-economic gains.

The Pilot was designed to test the instrument and provide the needed baseline data for the comprehensive country wide survey.

Consequently, the study of the creative sector will provide empirical knowledge on the industries, using Lagos as a case study. Three sectors of the creative industries were studied in this pilot survey: fashion, film and music.

The study as designed provided answers to the questions, inter alia, the contribution of the creative industries in terms of:

- Gross Value Added
- Exports of Services
- Employment
- Number of Businesses
- Skill sets within the sector
- Policy gaps and options towards addressing them

5 CAVEAT LECTOR

While adequate care was taken to ensure that only tested scientific methods and international standard codes were applied in the various processes of this study, it is important for the reader to note that results contained here were limited by the following:

- The survey findings are based on sampled population from 11 LGAs out of 20 LGAs in Lagos State and do not show the actual figures of the creative industries;
- also, only three items (Fashion, Music and Film) in the creative businesses were considered out of ten core sectors delineated as constituting Nigerian creative industries;
- furthermore, the perceived high tax regime in Lagos State may not be unconnected with respondents' apathy;
- under-reporting of income by respondents is a limitation to the data;
- some target respondents were not available to collect the questionnaire due to short duration of the field work; and
- The data collected for this pilot study being limited to Lagos state alone is not diversified enough to provide a valid statement on the performance and characteristics of the creative industries in Nigeria.

6 SIC CODES USED

The mapping conforms with the CPC Ver.2 subclasses to ISIC Rev.4 of the System of National Accounts (SNA) and HS 2007. However owing to the dynamic nature of these emerging creative industries within the Nigerian economy, the domestication of the following in Arts, Entertainment and Recreation section R of the ISIC Div 90 Group 900 and Class 9000 became necessary:

Fashion: Div 27 group 271. Div 28 and 29 of the cpc
Music: div 38 Group 383 class 3831 – 3836. Isic 3220
Film: div 38 Group 389 class 3897.

7 METHODOLOGY

DESIGN

The study adopted a cocktail of research tools, which were necessary to cater for the complexity, scope, and the variables of the subject matter. The major methodology adopted is survey. The following components featured in the design for the three sectors: fashion, film and music:

- Survey tools (questionnaire, focus group discussions, selection sheet, manual)
- Sampling technique (probabilistic)
- Stratified: sampling (systematic, cluster, random start was derived from random table)

STUDY DESIGN

- Eleven (11) LGAs were canvassed in the state.
- Twenty-four (24) EAs per LGA.
- Two hundred and sixty-four (264) EAs in the state.
- Ten (10) households per EA.
- Two thousand six hundred and forty (2,640) households were canvassed during the study while 2,624 copies of questionnaire were retrieved (including the online questionnaire). Sixteen (16) copies of questionnaire were not returned.
- For the Household questionnaire, selection was done on a daily basis based on the frame generated.
- Establishment and web-administered questionnaires, within the area of study: 4,642 were covered and retrieved.
- Listing was also carried out to provide a baseline frame of creative industry in Lagos
- A total of one hundred and twenty-four (124) enumerators were engaged to handle both household and establishment.

8 FINDINGS

From Analysis of data generated from the survey, the following details emerged.

8.1.1 Gender distribution in Creative Businesses

Figure 1 presents the distribution of individuals engaged in creative businesses by sex. There is a marginal difference between those in creative businesses when classified by sex. This is because as observed 52 per cent of such individuals are males compared to 48 per cent females in similar business.

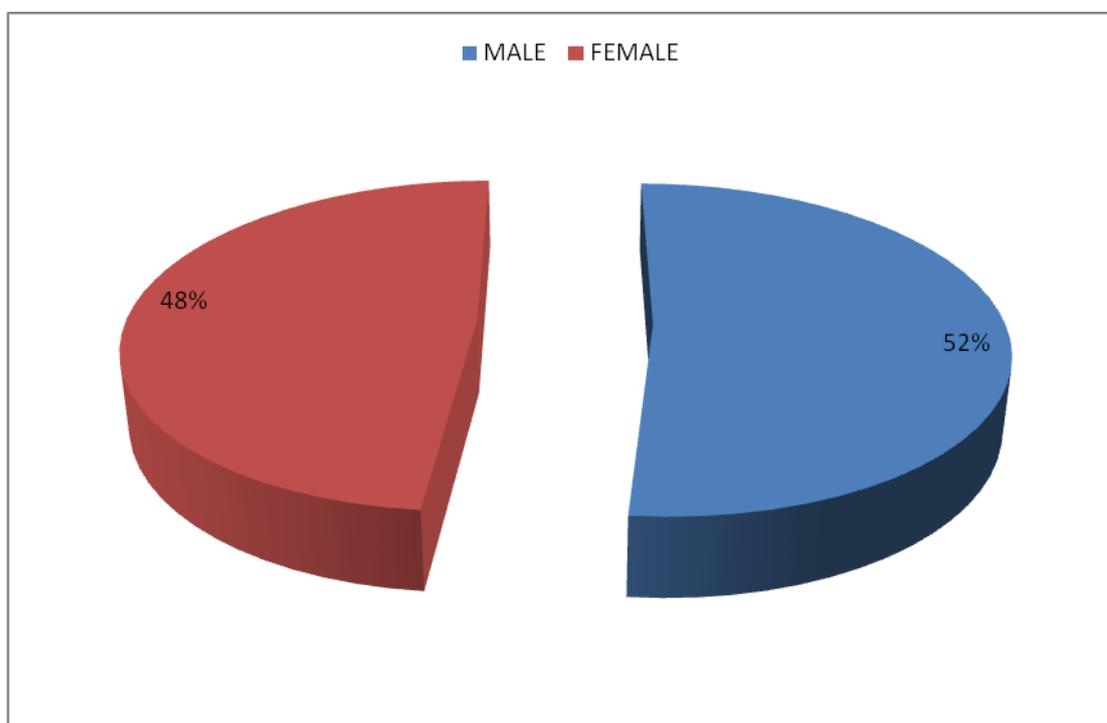


Figure 1: Gender Distribution in Creative Businesses

8.1.2 Gender Distribution by Type of Creative Businesses

The chart below (Figure 2) shows that majority (80.0%) of Males are engaged in Fashion business while 11.8 and 8.2 per cent are engaged in Music and Film respectively. Similarly, a greater proportion (86.2%) of Females is engaged in Fashion compared to 7.4 per cent and 6.4 per cent who are engaged in Music and Film respectively.

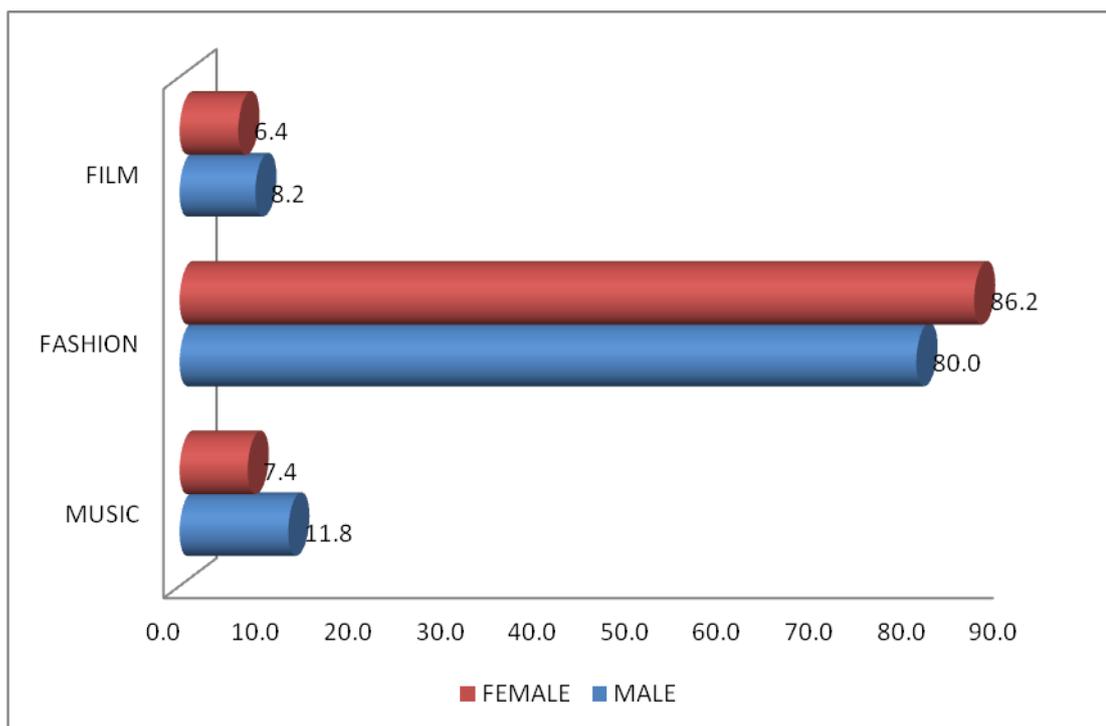


Figure 2: Gender distribution by Creative Sector

8.1.3

8.1.4 Marital Status and Relevant Training in Creative Businesses

Figure 3 shows the distribution of marital status and relevant skills/trainings in the creative businesses. Across all marital status categories, majority have basic skills required for engagement in the respective creative businesses. On the other hand, most individuals with advanced skills in creative businesses are either divorced/separated (38.8%) or married (26.5%).

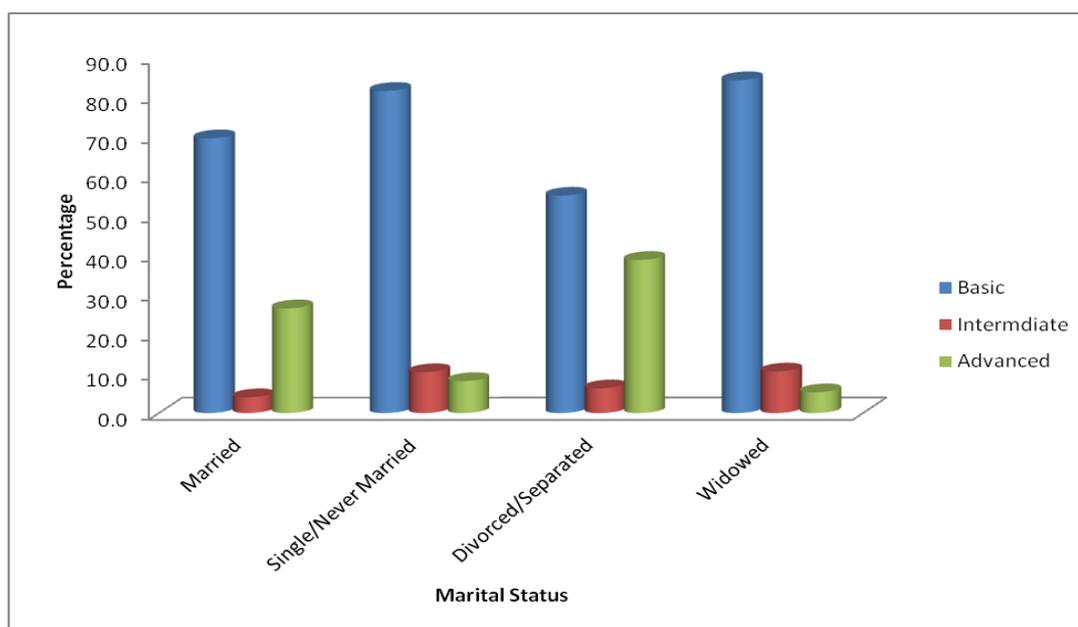


Figure 3: Marital Status and Relevant Trainings attended

8.1.5 Relevant Trainings Undertaken in the Creative Business

Figure 4 presents information on the level of training received in the creative business. Majority (70%) of individuals have basic skills required in their creative businesses whereas 24 per cent possess advanced proficiencies in their fields of endeavour.

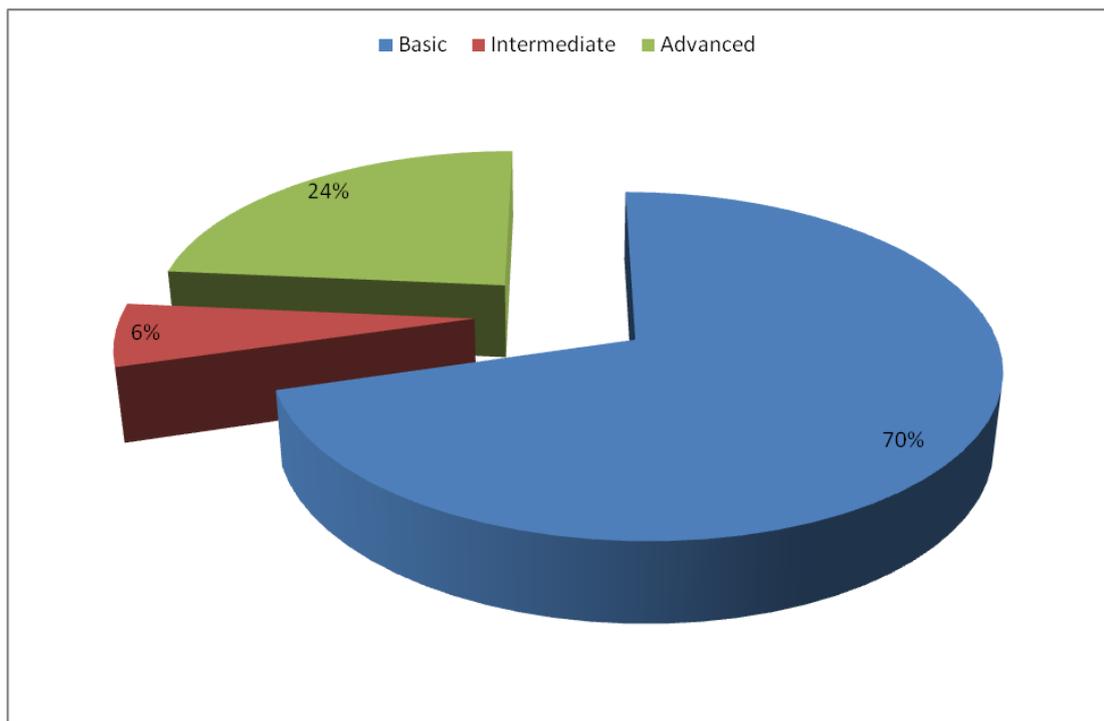


Figure 4: Relevant Training Undertaken in the Creative Business

8.1.6 Ownership Structure

The figure below (Figure 5) presents the ownership structure of creative establishments in Lagos. The pie chart shows that sole proprietors own 86 per cent of the establishments while private limited liability companies and partnerships own 7 per cent and 6 per cent respectively. Other forms of ownership, like cooperatives, public liability companies, etc. account for only 1 per cent.

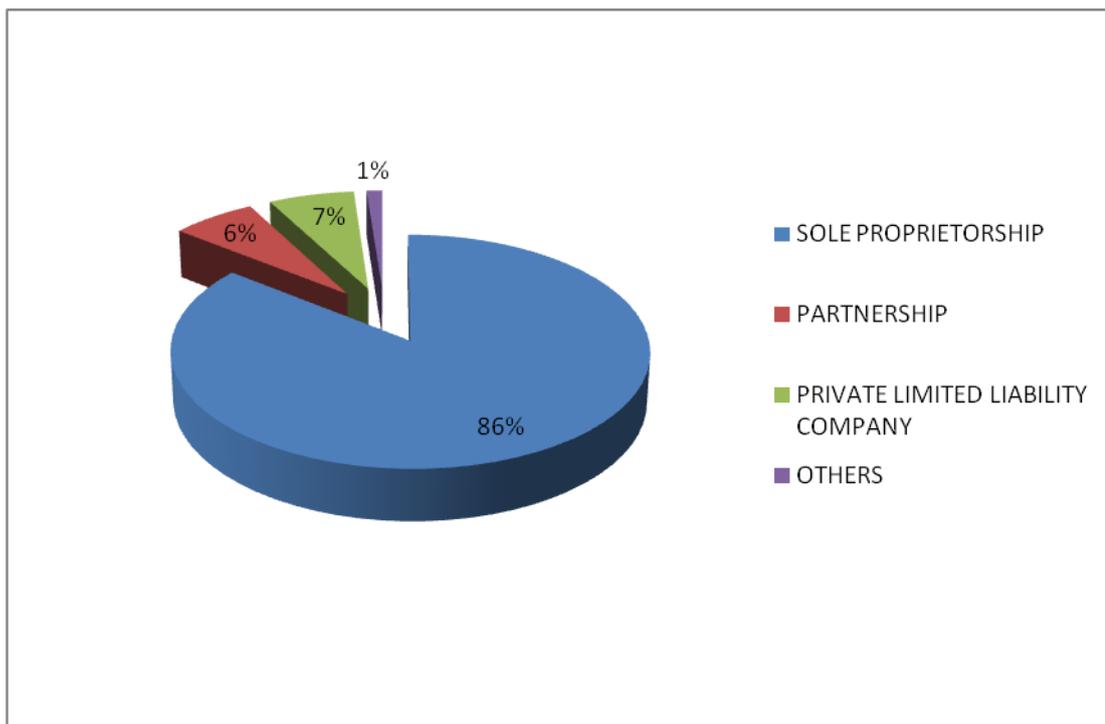


Figure 5: Ownership Structure

8.1.7 Sector Distribution of Creative Businesses

The chart below shows the rural/urban distribution of creative businesses in Lagos State by sector. Ninety-three per cent (93%) of the creative businesses (Music, Fashion and Film) are situated in urban areas with just 7 per cent located in the rural part of Lagos.

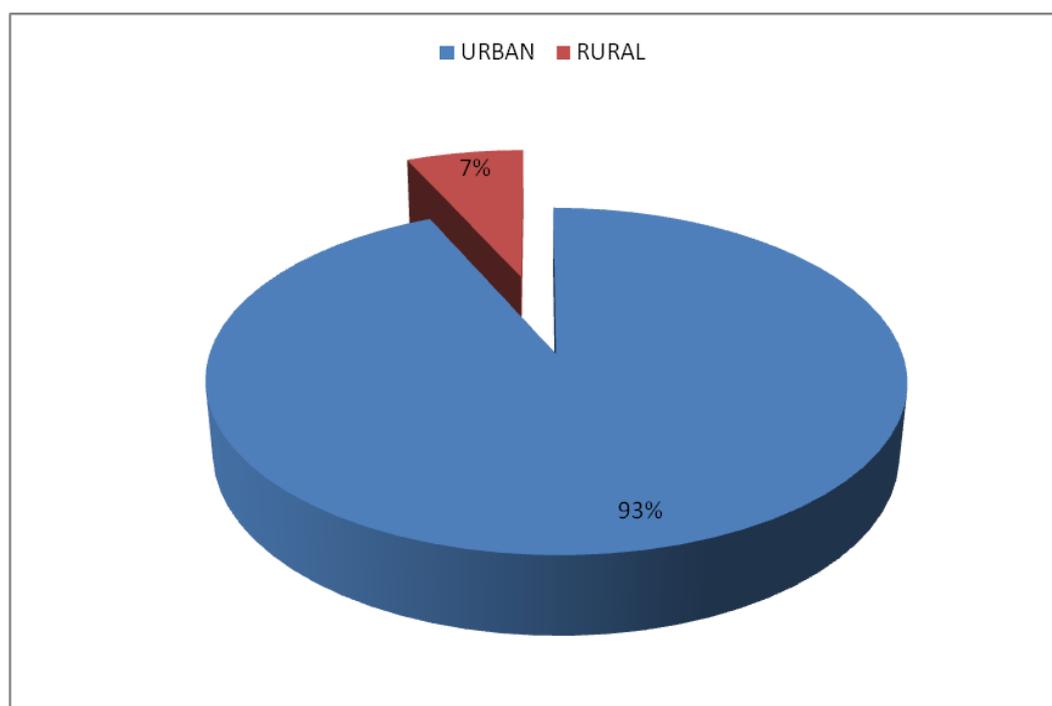


Figure 6: Urban/Rural Distribution of Creative Businesses in Lagos

8.1.8 Distribution of Creative Businesses by LGA

Figure 7 indicates that the highest concentrations of Fashion businesses in Lagos LGAs are in Ajeromi/Ifelodun (92.6%), Surulere (90.4%), and Oshodi/Isolo (90.2%). Music, is concentrated in Ojo (24.9%), Ibeju/Lekki (20%) and Etiosa (11.4%). The highest concentrations of Film establishments are in Ojo (28.1%), Lagos Island (13.9%), Kosofe (9.7%). However, the lowest concentration of Fashion, Music and Film establishments are in Ojo (47.0%), Lagos Island (1.4%) and Mushin (2.0%) respectively.

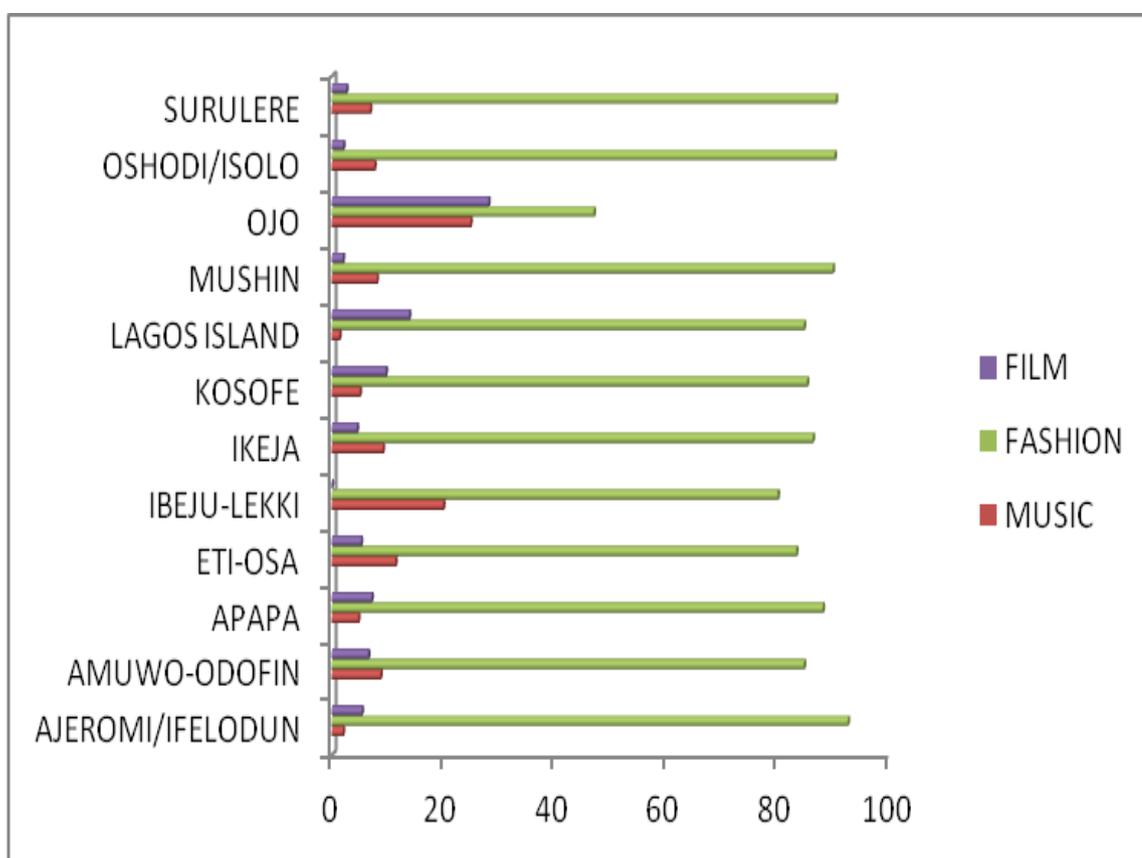


Figure 7: Distribution of Creative Businesses in Lagos by LGA

9 PROFIT FROM CREATIVE BUSINESSES

This section provides estimates of the income and expenditures from the creative businesses studied as well as the non-economic rewards.

9.1 Creative Activities Income/Earnings Generated

9.1.1 Average Earnings from Fashion

Figure 8 shows at aggregate level, a steady increase in the amount of earnings generated from 2010 to 2012. Overall, earnings from fashion businesses in 2012 represent 45 per cent of the total income generated with those of 2010 and 2011 contributing 23 and 32 per cent respectively. These represent a 26.2 per cent increase between 2010 and 2011 as well as a 24 percent increase between 2011 and 2012 average earnings.

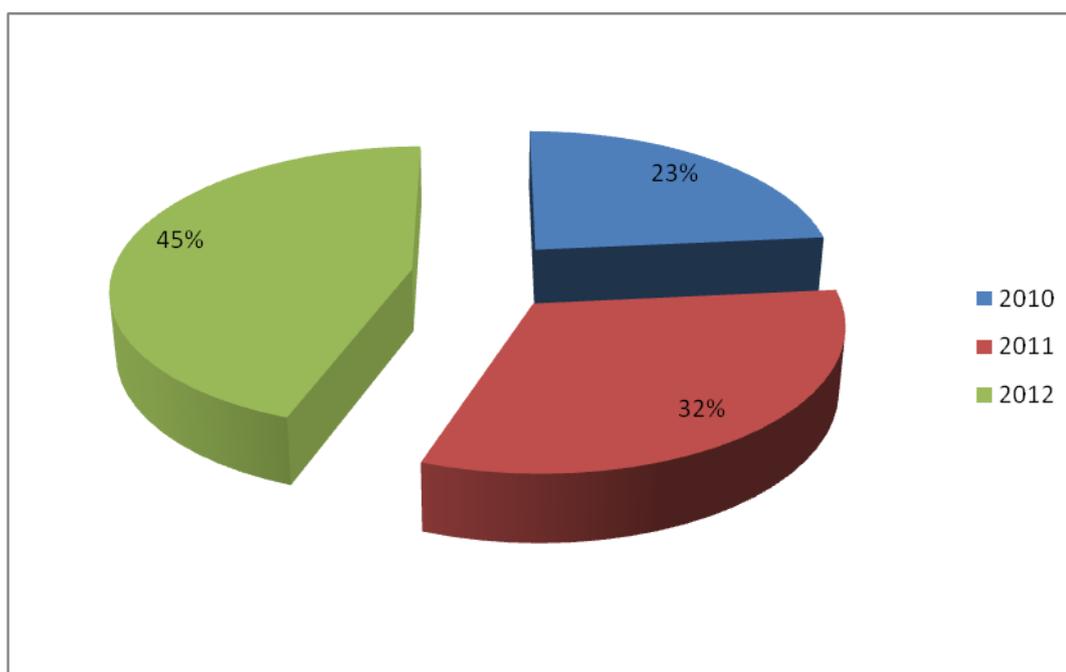


Figure 8: Average Earnings from Fashion

9.1.2 Average Earnings from Music

The chart below (Figure 9) shows variations in the level of earnings generated in the Music industry from 2010 to 2012. Overall, earnings Music businesses in 2010 represent 38 per cent of the income during the period with those of 2012 and 2011 contributing 37 and 25 per cent respectively. These represent

a 33.5 per cent increase between 2011 and 2012 and a 52.5 per cent decrease between 2010 and 2011 average earnings

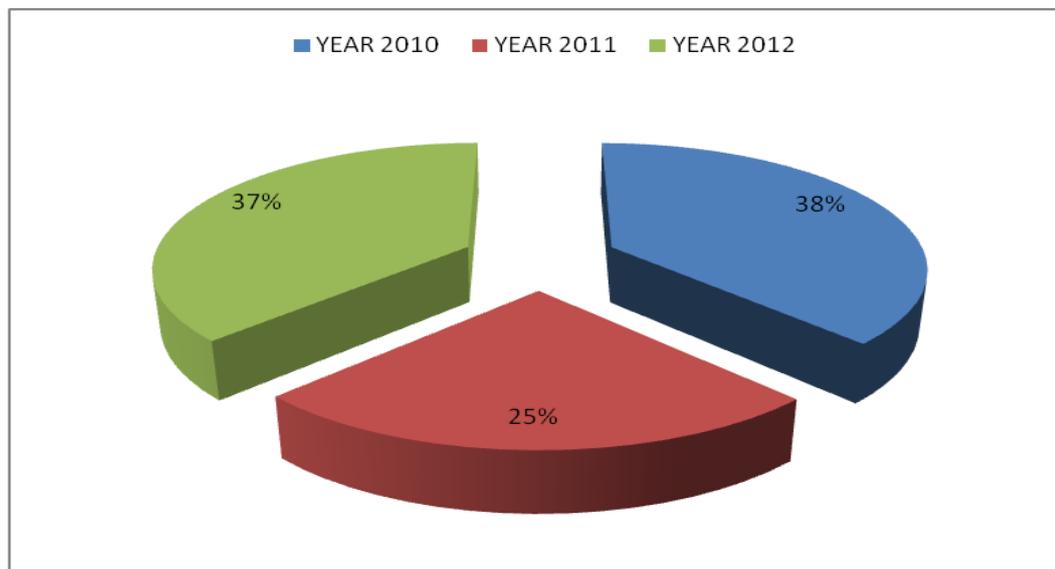


Figure 9: Average Earnings from Music

9.1.3 Average Earnings from Film

At aggregate level, earnings from Film businesses show a steady increase from 2010 to 2012 (Figure 10). While earnings in 2012 represent 50 per cent of the total income generated, those of 2011 and 2010 contribute 31 per cent and 19 per cent respectively. These represent a 52.2 per cent decrease between 2010 and 2011. However, there was a 33.5 percent increase between 2011 and 2012 average earnings

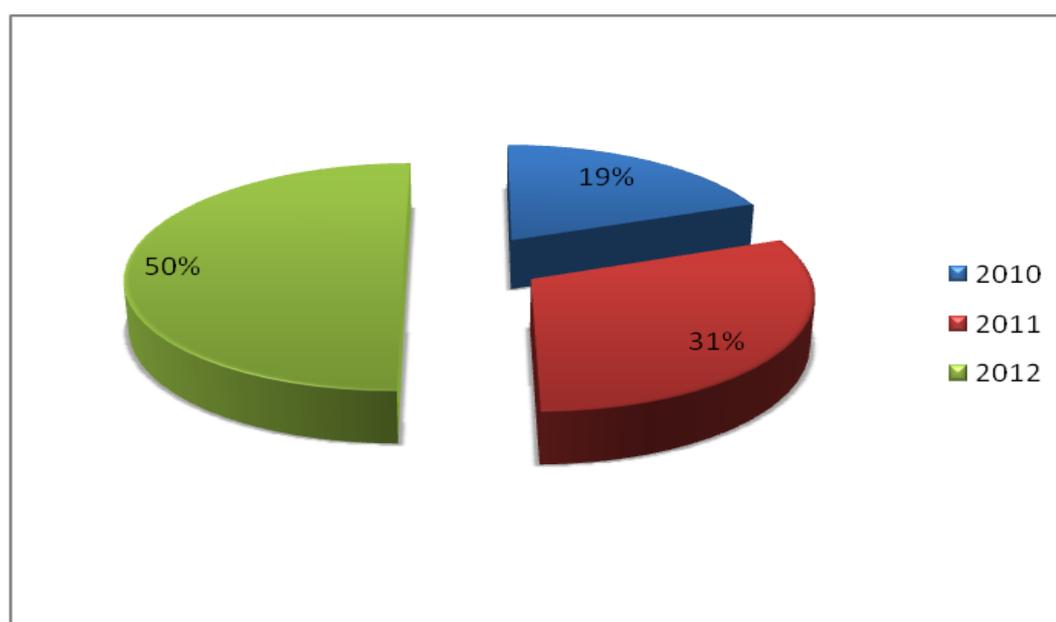


Figure 10: Average Earnings from Film

9.1.4 Average Earnings from Outside Nigeria

Figure 11 below shows that the highest average earnings in creative businesses from outside the country were from Fashion in 2010 and 2012, Film in 2011 and lowest in Music across the reference years.

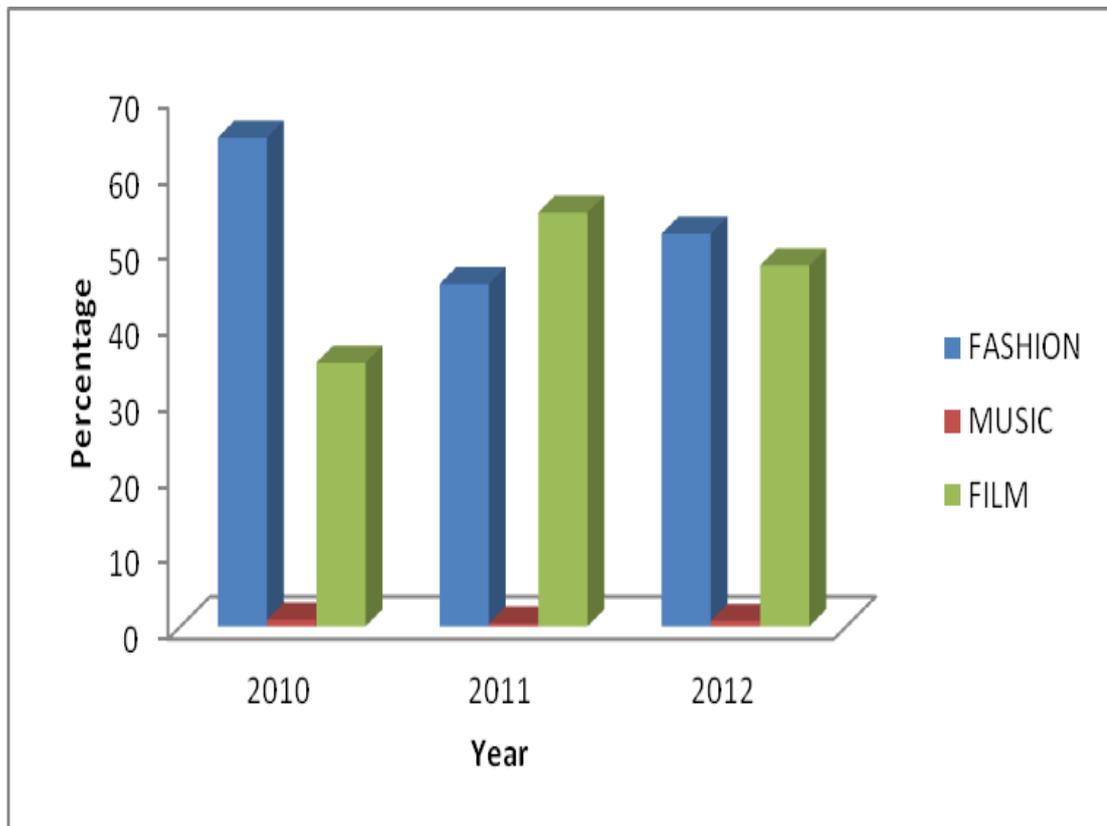


Figure 11: Average Earnings from outside Nigeria

9.1.5 Non-Economic Rewards

A synopsis of non-economic rewards acquired from creative businesses during the reference period is presented in the chart below. Overall, awards from Film industry accounted for the highest (36%) of all awards. On the other hand, Music and Fashion awards accounted 32 per cent each. In addition, figure 12 below shows that 55 per cent of the non-economic rewards received in creative industry during the period are International awards, 31 per cent national and 14 per cent state awards.

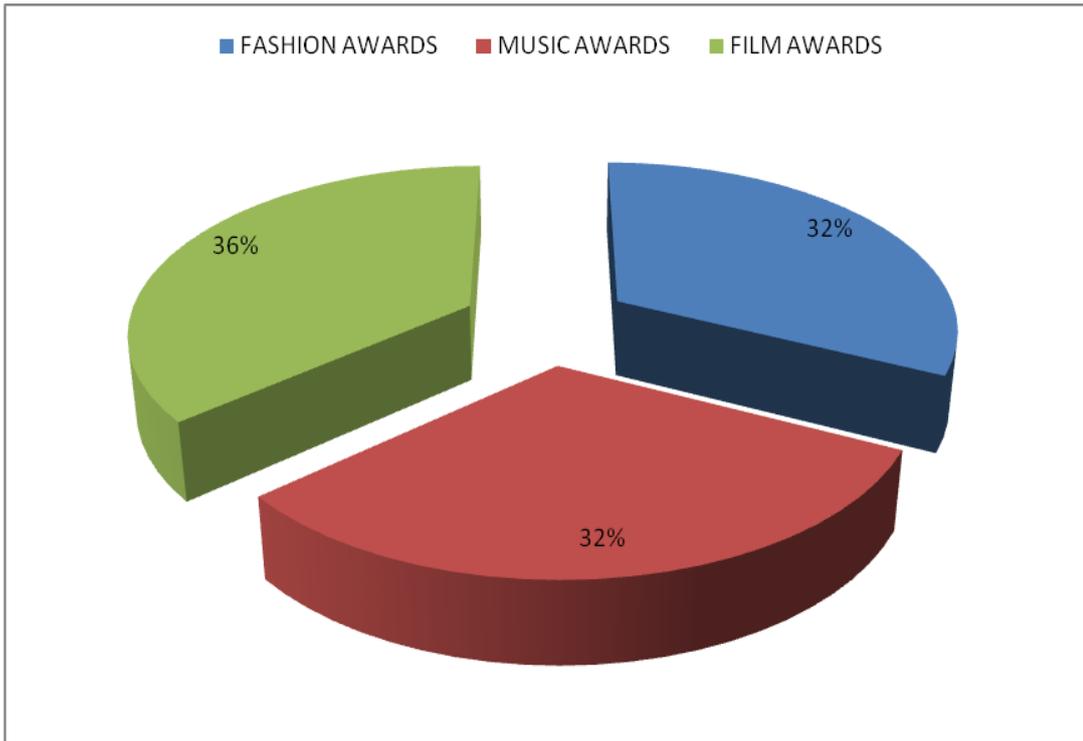


Figure 12: Non-economic Rewards

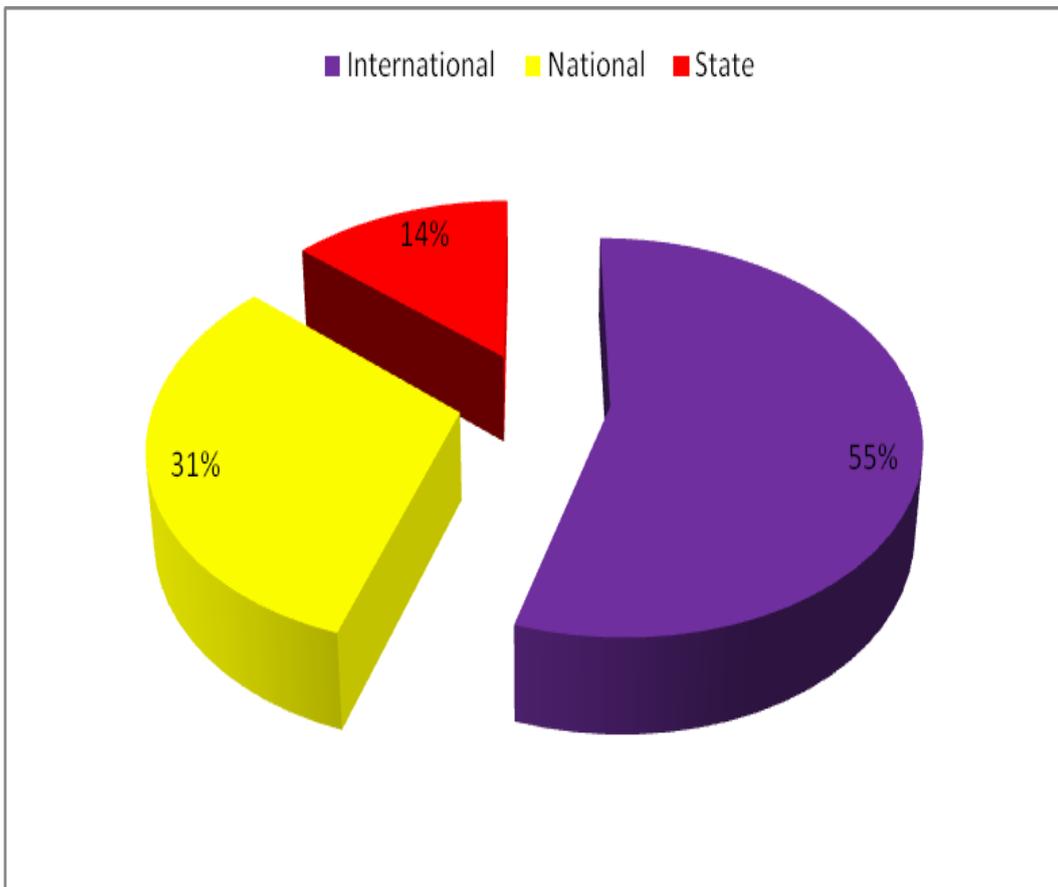


Figure 13: Categories of Non-economic Rewards

9.1.6 Sources of Patronage of Creative Businesses

Figure 14 shows sources of patronage of creative businesses during the reference period. Majority (91%) of all patronages came from individuals while only 9 per cent came from private organizations. The patronage from government agencies as observed was insignificant.

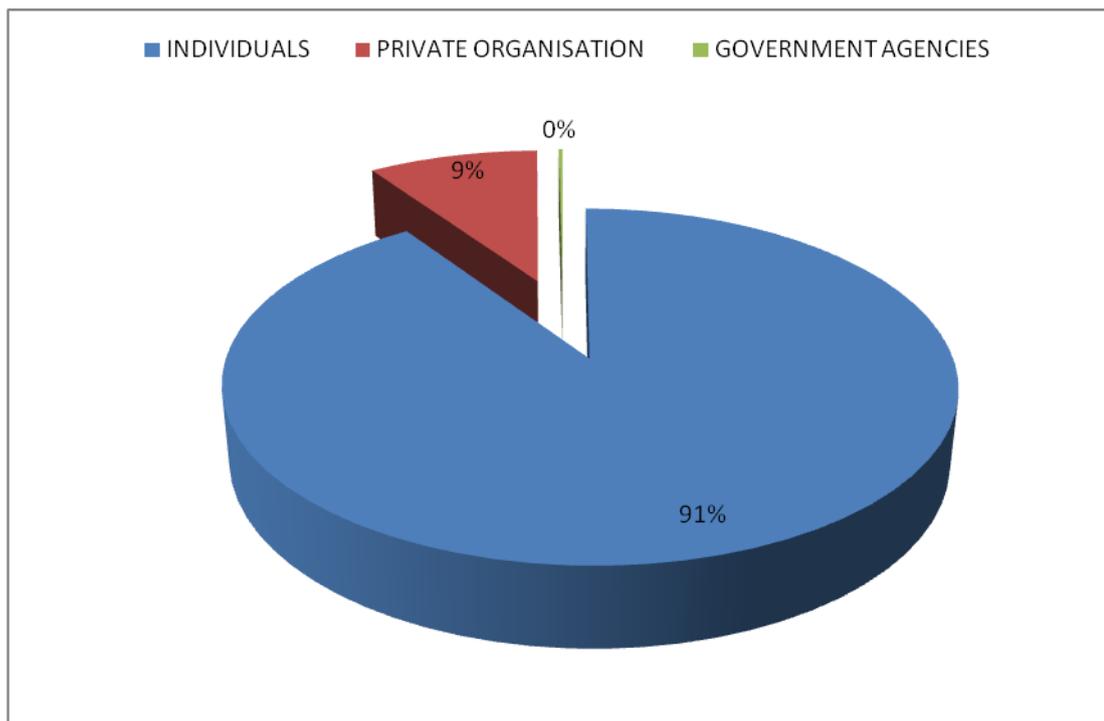


Figure 14: Sources of Patronage of Creative Businesses

9.2 Average Monthly Expenditure

9.2.1 Fashion

Findings from Figure 15 below show that across the years, the majority of expenditure in the Fashion business came from raw materials followed by salary and wages. Considered on a yearly basis, 95.45 per cent of all expenditure in 2012 was compared with those of 2011 (73.265) and 2010 (68.21%).

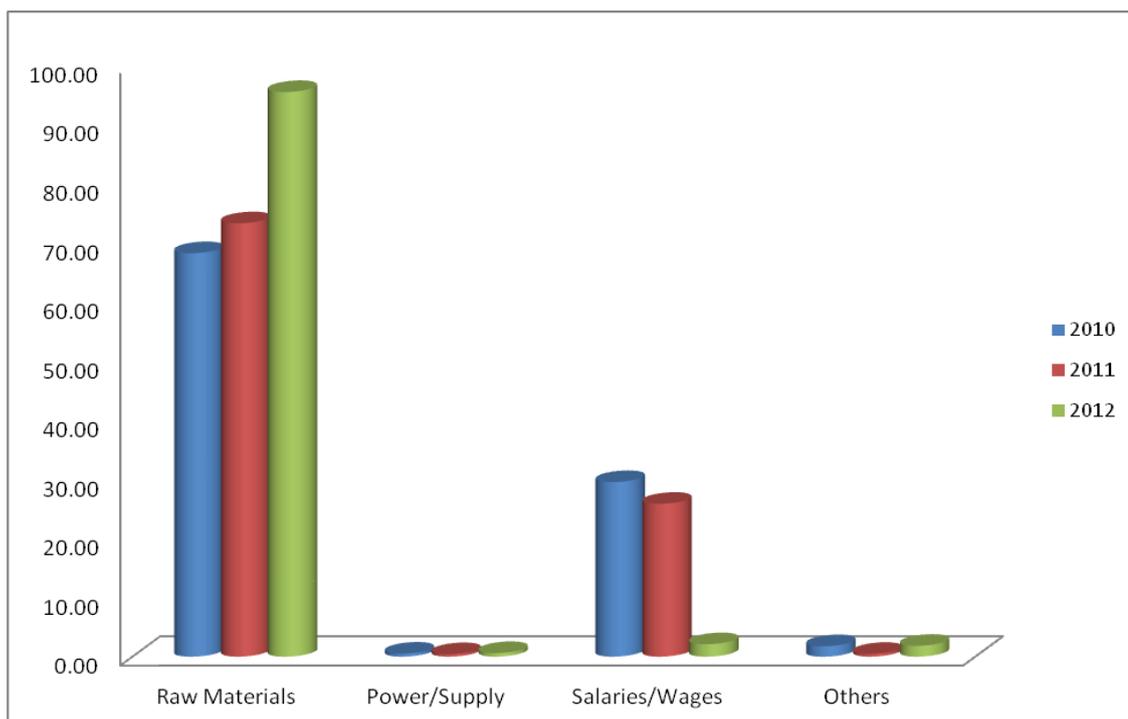


Figure 15: Average Monthly Expenditure (Fashion)

9.2.2 Average Monthly Expenditure on Music

Figure 16 presents aggregate average monthly expenditure in the Music business for the three years. It follows a similar pattern as observed above with raw materials and salaries/wages accounting for the highest (51.68% and 47.79%) areas of expenditures in the sector.

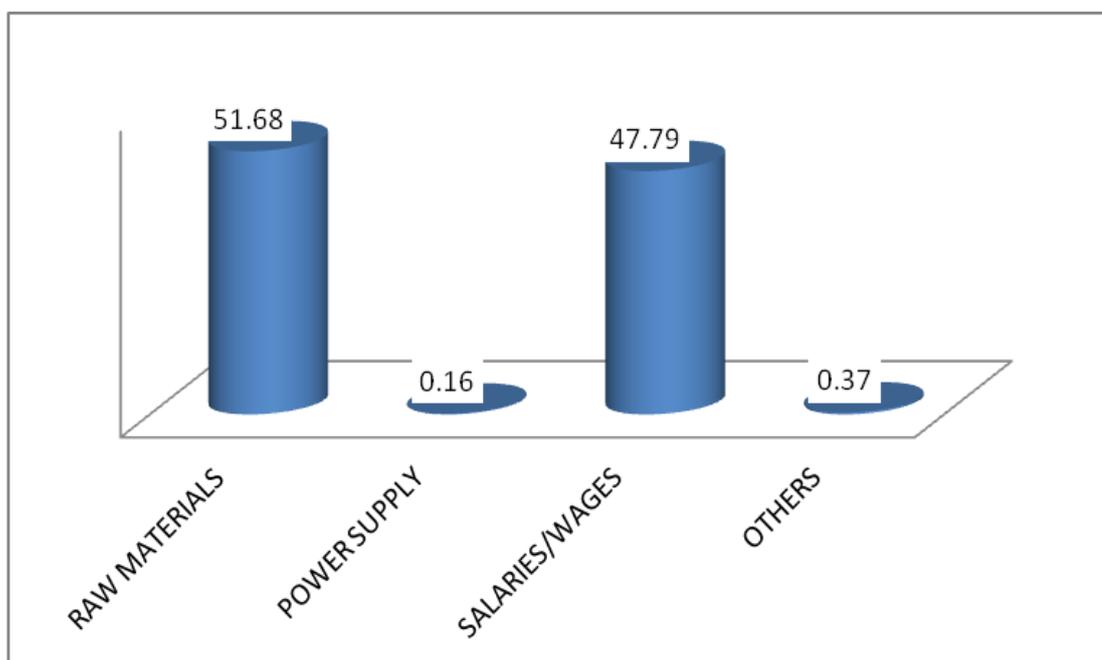


Figure 16: Average Monthly Expenditure (Music)

9.2.3 Film

Figure 17 below shows that in the film sector, business expenditure within the period (2010 – 2012) indicates a similar pattern with earlier reported findings in other sectors. More than four-fifth (94%) of all expenditures during the period were in the acquisition of raw materials.

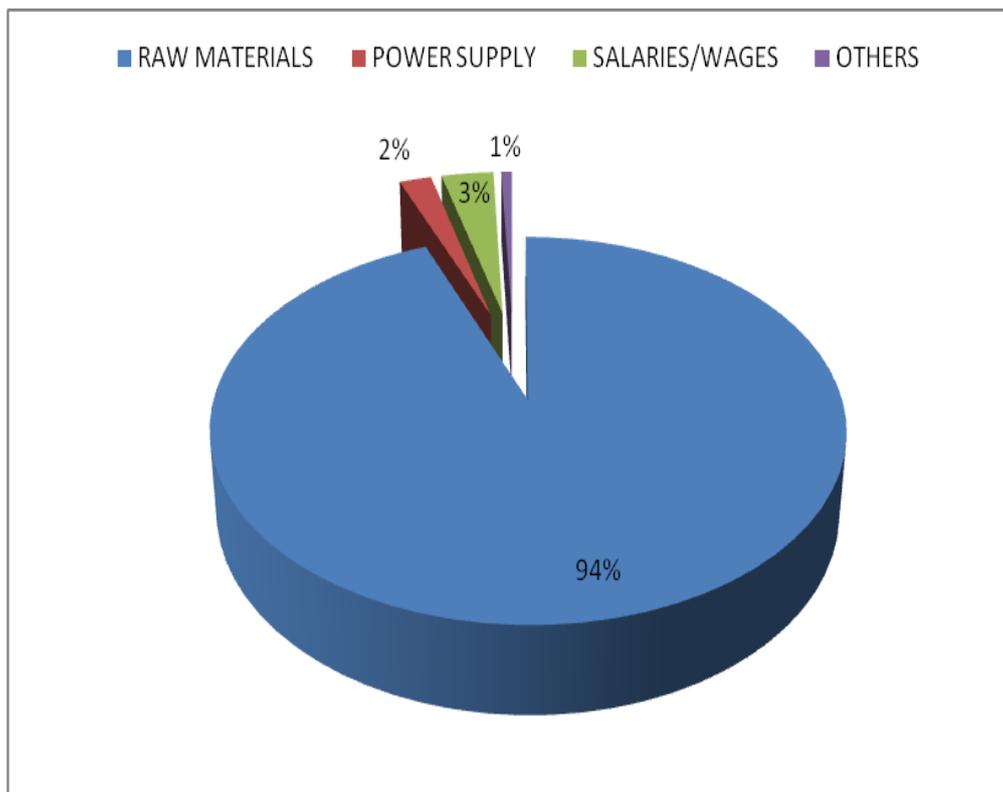


Figure 17: Average Monthly Expenditure (Film)

9.3 Employment Pattern in the Creative Industry by Gender

This section provides information on the employment pattern by gender within each of the creative businesses studied.

9.3.1 Distribution of Individuals by Creative Businesses

It is evident as observed in the pie chart below (Figure 18) that, majority (84%) of those engaged in creative businesses in Lagos State are in Fashion while 9 per cent and 7 per cent are in Film and Music respectively.

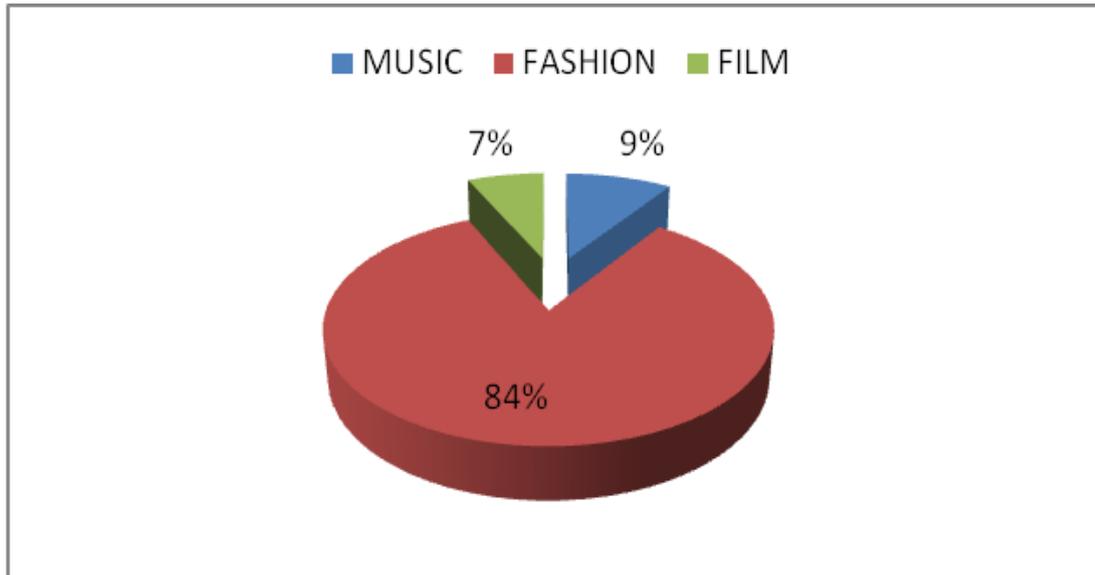


Figure 18: Distribution of individuals by Creative Businesses

9.3.2 Music

The findings (Figure 19) reveal that majority of females (23.0%), are engaged in the Music industry as Singers, Dancers/Choreographers (21.3%) and Song-writers (16.4%); while the minority (1.6%) provide record label services. For the males, the majority (25.1%) are engaged as Singers, Song-writers (17.5%) and Live Shows/Nite Club performers (13.5%). The minority of the males (0.7%), on the other hand, are engaged in the ancillary services sub-sectors.

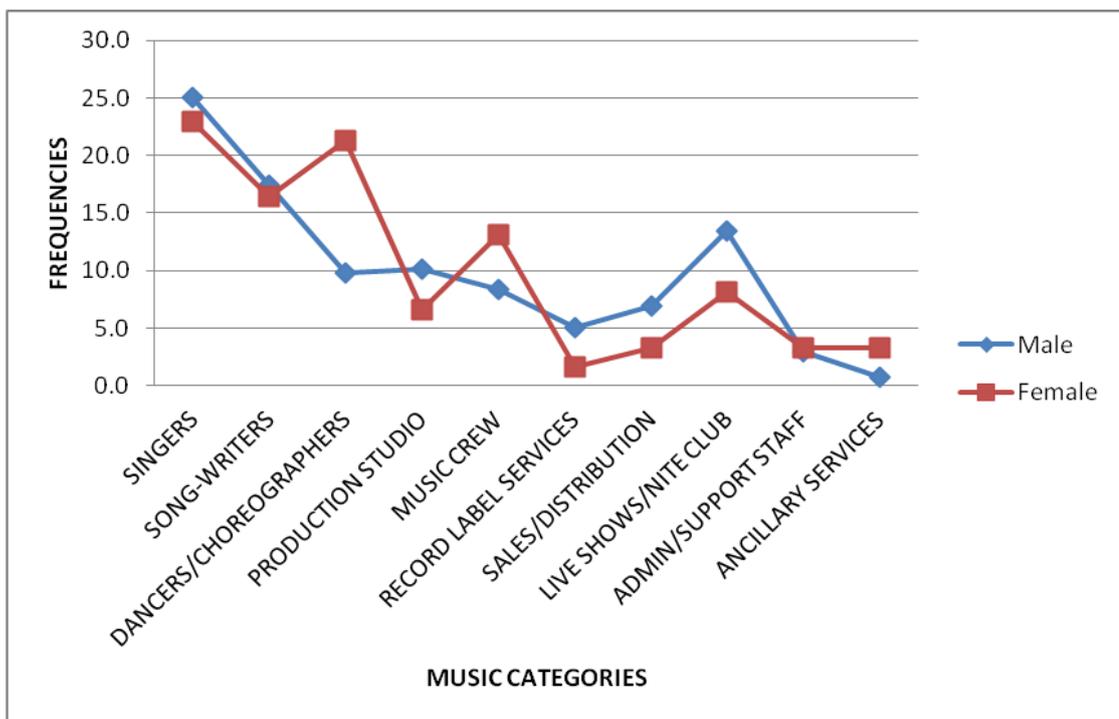


Figure 19: Sex Distribution by Business activities in Music

9.3.3 Fashion

Figure 20 reveals that majority of females (30.2%), are engaged in Fashion industry as Make-up/Hair services, Tailors/Embroiders (27.7%) and Sellers of Fashion Accessories (20.3%); while the minority (0.9%) perform other ancillary services. For the males, the majority (36.6%) are engaged as Tailors/Embroiders, Make-up/Hair services (20.2%) and Trainers (12.5%). Among the minority for the males (0.8%), on the other hand, are Admin/Support Staff.

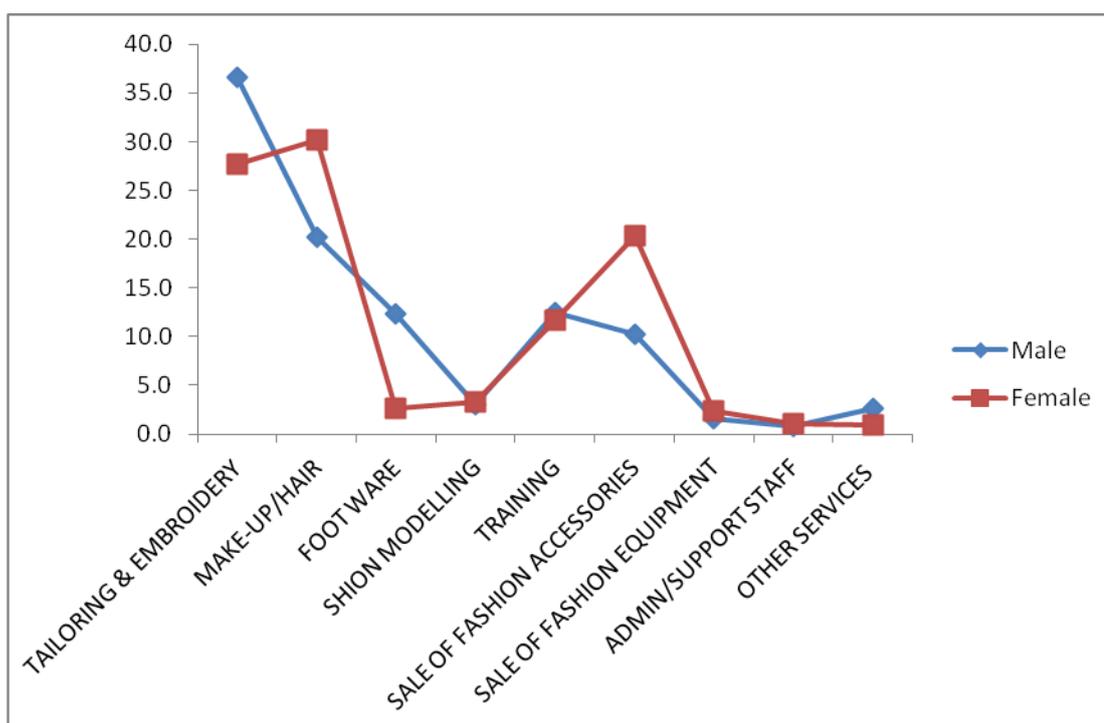


Figure 20: Sex Distribution by Business activities in Fashion

9.3.4 Film

Figure 21 below reveals that majority of females (60.5%), are engaged in the Film industry as Actors, Script/Screen Writers (10.5%) and Directors (7.1%); while the minority (2.6%) are Executive Producers. For the males, the majority (23.6%) are engaged as Producers, Actors (22.2%) and Script/Screen Writers (12.5%). Among the minority for the males (4.2%), on the other hand, are Executive Producers.

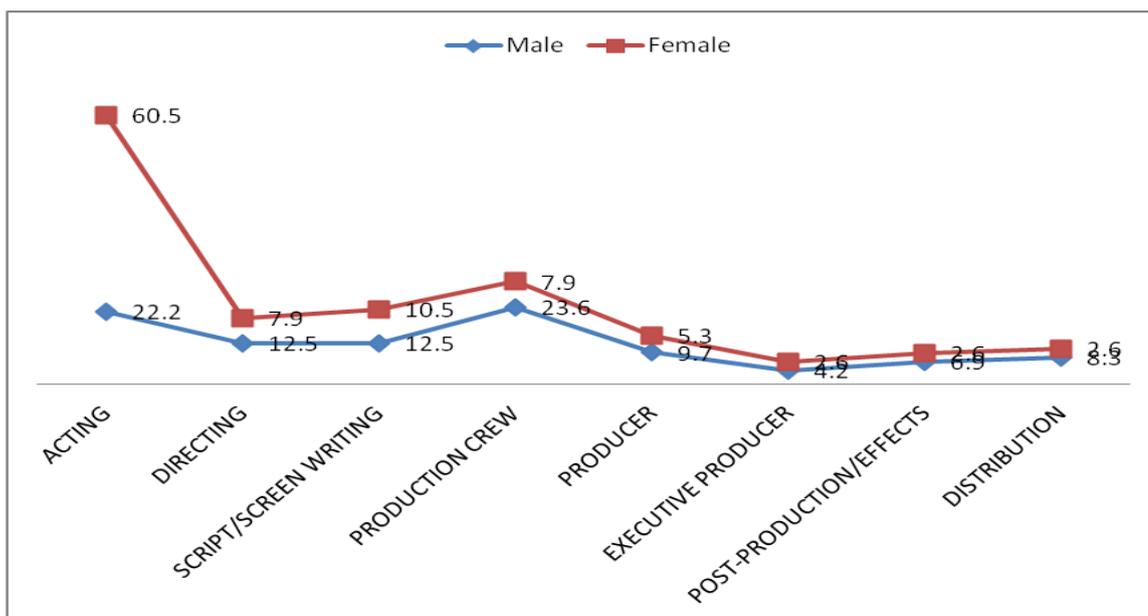


Figure 21: Sex Distribution by Business activities in Film

9.4 Creative Business Expenditures

9.4.1 Raw Materials

Figure 22 provides information on raw materials expenditure on creative business in the period of reference. Across the years, more expenditure was made on raw materials in the Film industry compared with Fashion and Music in the same period.

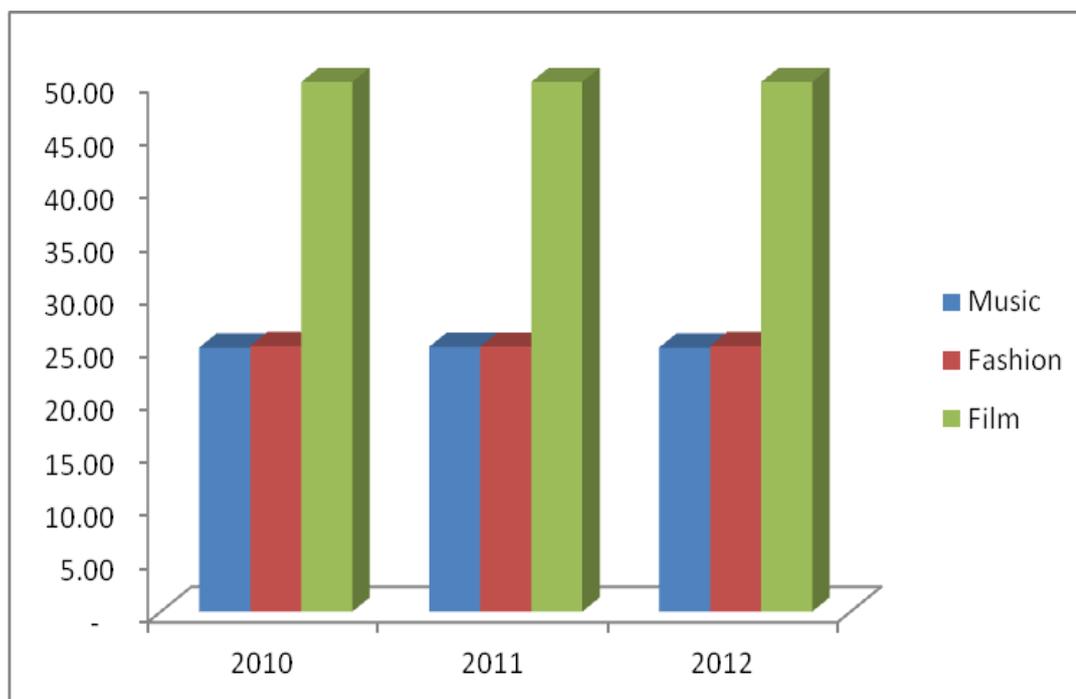


Figure 22: Expenditures on Raw Materials by Year

9.4.2 Power Supply

Figure 23 shows the pattern of expenditure on power supply in the creative industry at household level for the period 2010 to 2012. However, in the Film industry, expenditure increased from 37.9 per cent in 2010 to 85.2 per cent in 2011 but later declined to 69.2 per cent in 2012. On the other hand, there was a sharp decline on the power supply expenditure in the Music industry from 50.6 per cent in 2010 to 9.6 per cent in 2011 and later 7.6 per cent in 2012.

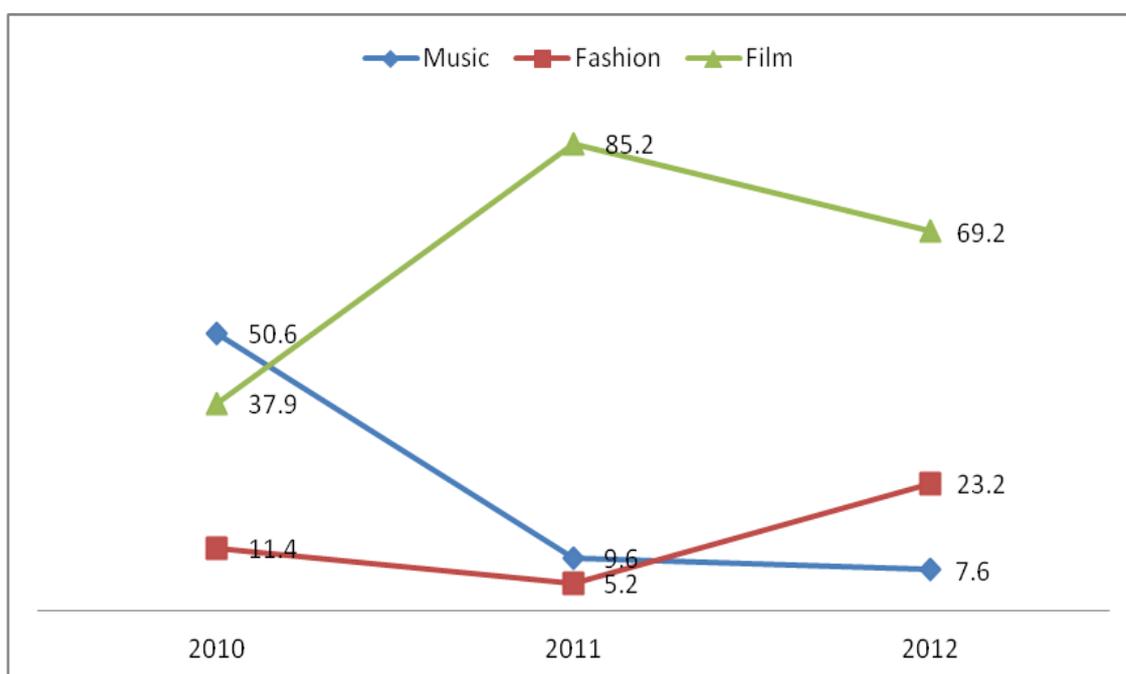


Figure 23: Expenditures on Power Supply by Year

9.4.3 Wages/Salaries

On wages and salaries, the expenditures in the film industry increased from 76.7 per cent in 2010 to 82.4 per cent in 2011 but later declined to 66.5 per cent in 2012. On the other hand, expenditures on both Music and Fashion were high in 2010 but declined in 2011 before picking up again in 2012 (see Figure 24).

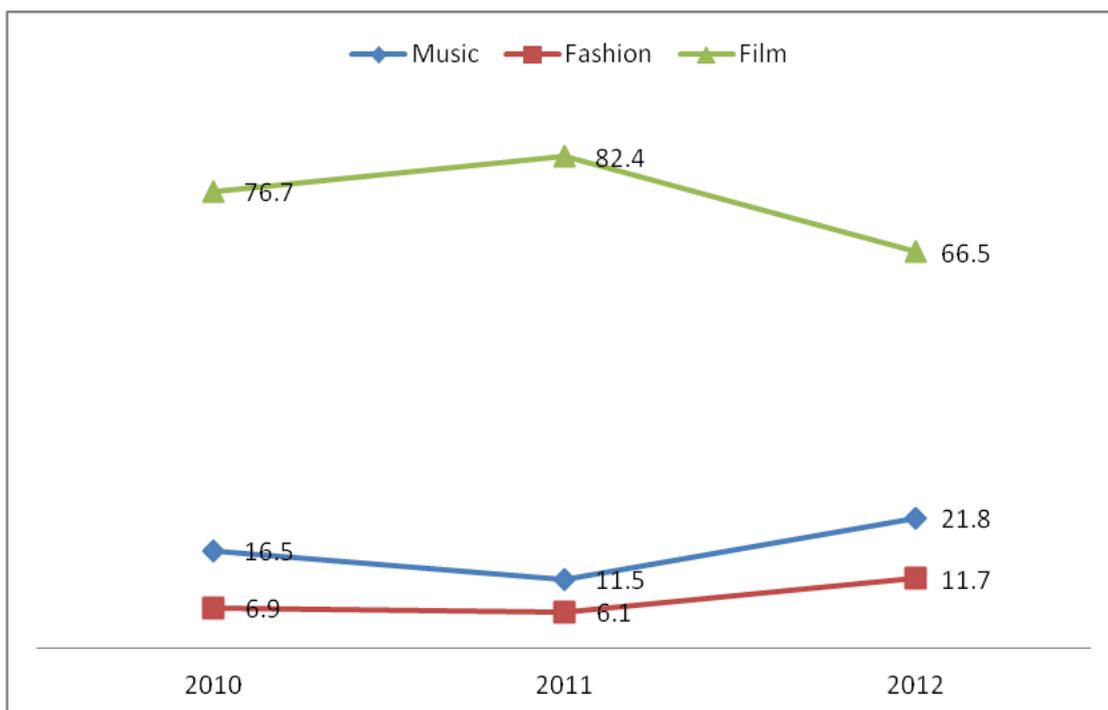


Figure 24: Expenditures on Wages/Salaries by Year

9.4.4 Other Expenditures

Other expenditures in the creative industries between 2010-2012 shows a slight decline from 91 per cent in the film industry in 2010 to 85.9 per cent in 2012. However, other expenditures on Fashion increased from 2.7 per cent in 2010 to 8.5 per cent in 2012 as indicated in Figure 25.



Figure 25: Expenditures on other items by Year

9.5 Creative Businesses Contribution to Economy

9.5.1 Gross Value Added

The chart below (Figure 26) shows the yearly gross value added by the creative industry in the reference period. It could be observed that the GVA continually increased from 2010 to 2012. From a total amount of =N579,781,462.47 in 2010, it increased to =N=833,186,941.19 in 2011 and further rose to =N=1,134,332,086.59 in 2012. Put together for the three years, the GVA from creative industry amounted to =N=2,547,300,490.26

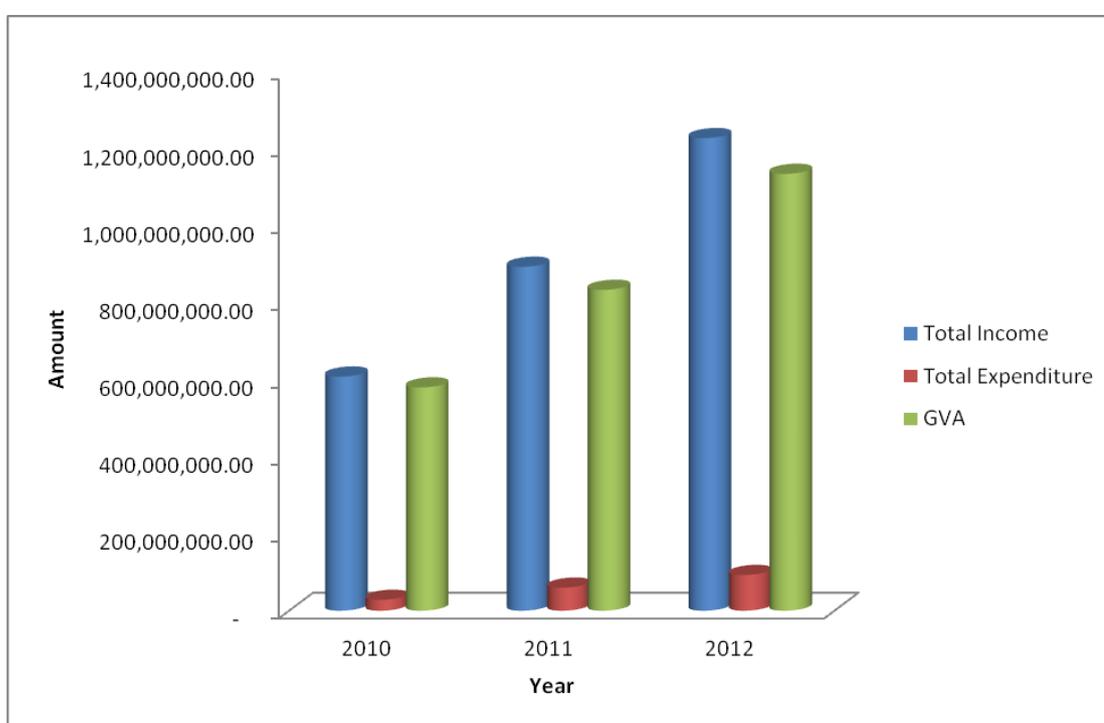


Figure 26: Gross Value Added by Year

9.5.2 Sector-based Gross Value Added

Figure 27 provides information on the creative business sector-based gross value added. It shows that overall, the Film industry contributed 61 per cent of the total gross value added compared with the Fashion (26%) and Music (13%) industries.

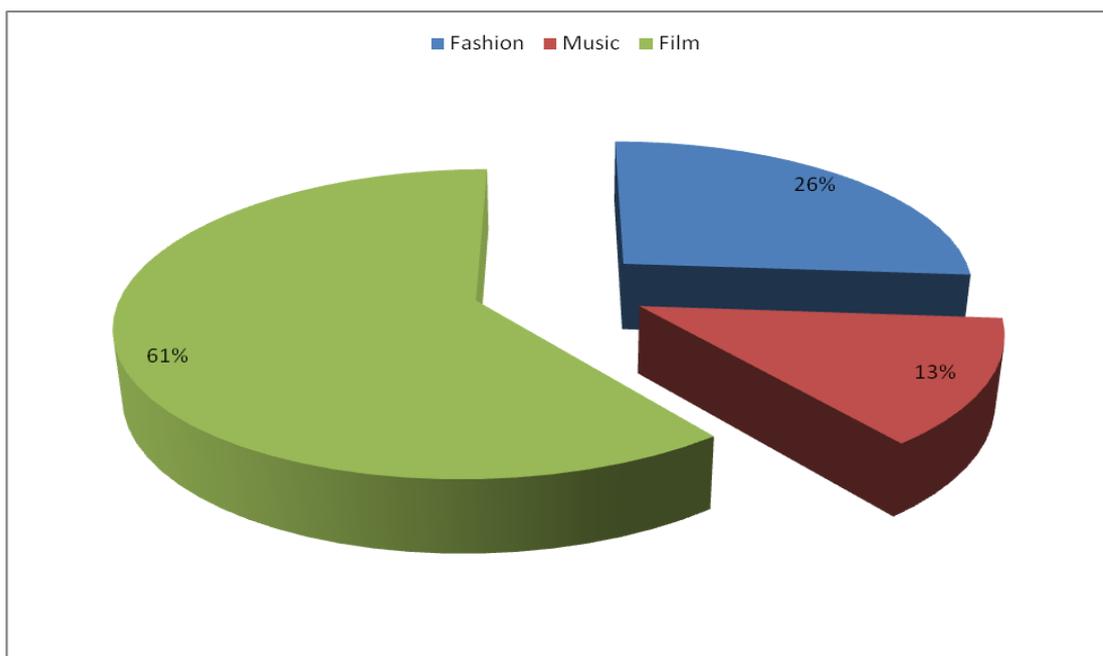


Figure 27: Gross Value Added by Sector

9.5.3 Gross Value Added by Sector and Year

From the chart below (Figure 28), the GVA by sector and year shows a steady increase across the years for the Film and Fashion industries. In the Film industry, the GVA increased from 18.81% in 2010 to 46.27 per cent in 2012. A similar pattern was also observed for the Fashion industry. However, that of the Music industry declined from 41.96 per cent in 2010 to 16.50 per cent in 2011 before picking up again in 2012 (41.54%).

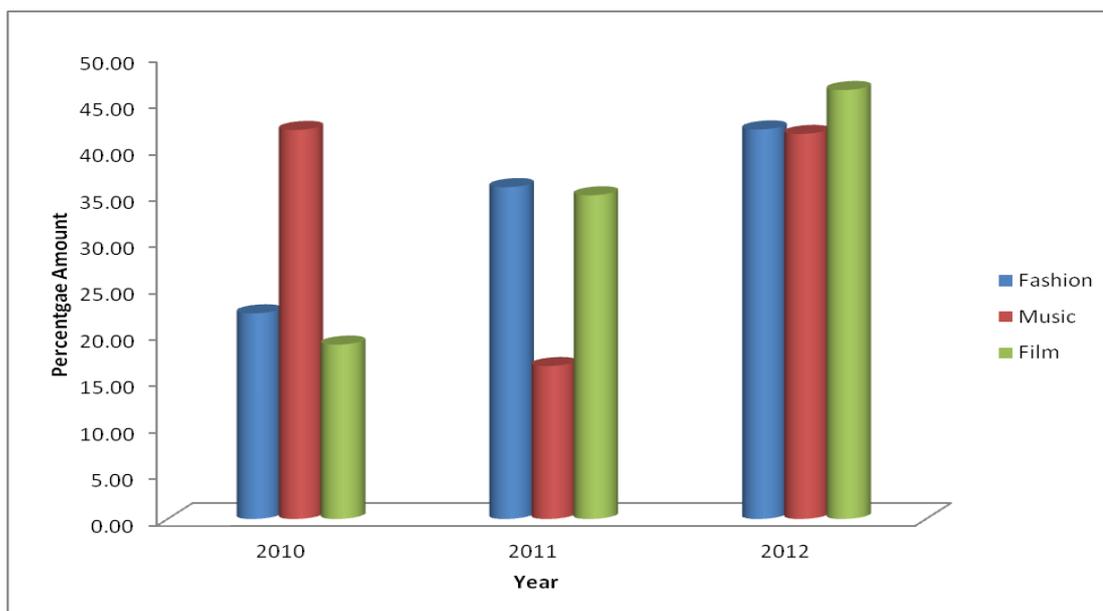


Figure 28: Gross Value Added by Sector by Year

10 FINDINGS, OBSERVATIONS AND RECOMMENDATIONS

This section presents findings, observations and recommendation of creative businesses in the Lagos Pilot Study. Such findings could inform policy to drive the creative economy towards the needed diversification of the Nigerian economy and improve trade and development.

In determining the financial contribution of the creative industries to Nigerian economy, the Gross Value Added (GVA) for both state and sector levels were computed. As observed from the study, the GVA rose steadily between 2010 and 2012. Combined, the creative businesses contributed =N=2,547,300,490.26* during the reference period. More significant is, the study showed that 61 per cent of the total GVA was derived from the Film industry while Fashion and Music contributed 26 per cent and 13 per cent respectively.

The effort to ascertain the non-economic contributions of creative industries to the economy was achieved from measuring the non-economic rewards. The study observed that various recognitions and awards were received in the creative industry both locally and internationally and more prominently from the Film industry.

The level of participation of women in the creative industries as explored in this study showed a good number of women gainfully engaged in various capacities in creative businesses. This ranges from Make-up/Hair Servicers, Embroiders, and Dealers in Fashion Accessories in Fashion to Actors, Script/Screen Writers and Directors in the Film Industry. Over all, with a 48 per cent level participation among women when disaggregated by sex compared to males, it is obvious that the participation of women in creative businesses in this study is commendable.

An enquiry on the relevant trainings in creative businesses was undertaken to determine the level of existing skills and competence gaps in the creative industries. The study revealed that relevant skills exist in the creative businesses since majority (70%) of individuals have basic skills while 24 per

cent possess advanced skills required for creative businesses. However, most individuals with advanced training/skills in creative businesses are either divorced/separated (38.8%) or married (26.5%)

10.1 Recommendations

This section offers recommendations based on the observations made during the Pilot study. The aim is to ensure a more successful nationwide survey of creative industries in Nigeria in the nearest future. Also recommendations are made here to address some policy gaps observed during the field work.

- There is need to integrate creative business indicators in already existing/routine national surveys conducted by the National Bureau of Statistics (NBS) such as the quarterly GDP, NBS/CBN Socio-economic survey, Nigerian labour Force Survey and the Employment Generation Survey. This will ensure constant compilation of the contribution of creative activities to the economy;
- Considering the contribution of creative businesses to economic development of Nigeria, efforts should be made to inject such activities into the newly anticipated sectors of the Nigerian economy especially through the on-going rebasing project of the economy;
- There is need for creative business industries to undertake proper record keeping/documentation, which will promote accurate reporting of timely, and reliable data gathering. It will also foster prompt provision of information even in the absence of key officers in such establishments;
- It is appropriate to undertake intensive enlightenment campaign programme before, during and after the project. Majority of the creative business industries were not sufficiently mobilised and sensitised ahead of the fieldwork to ensure their full cooperation with enumerators.
- Adequate and comprehensive training and capacity building for enumerators and supervisors should be undertaken prior to the field

work to enable them have good grasp of the tools. This will increase their efficiency and ensure better time management in the field;

- There is need for proper delineation of enumeration areas and provision of maps for proper identification of target groups. Furthermore, the timing of the fieldwork should carefully chosen in order to avoid disruptions that come with the raining season;
- The Federal Government should take part in the project through provisioning of counter-part funding that will encourage easier buy-in by other stakeholders; and
- It is strongly recommended that immediate follow up comprehensive nation-wide surveys be conducted in other zones of the country to enrich and verify the findings contained herein.

PLEASE NOTE:

* The performance of the music sector in this pilot survey is poor as most of the major players in this sector who are based in Lagos did not participate in the survey. This is evident from the conspicuous absence of big names of top musicians and producers like P-Square, Don Jazzy, Tu-face Idibia, Dbang, etc. from the frame generated during this survey (see appendix). We are aware, for instance, that Nigerian musicians (all Lagos based) accounted for seven out of the list of top ten 'Most Bankable African Artists' derived from the 2013 survey by **Channel O** and **Forbes Africa** which was released on Monday, September 2. Forbes Africa also in an earlier survey noted that P-Square and Tu-face Idibia earn \$150,000 and \$80,000 per foreign show respectively. P-Square is known to have had more than five of such shows in 2013 alone. If these artistes had provided their data during the survey, the performance of the music sector and its contribution to the GVA would have been remarkably different. This means that the current GVA, which was derived solely from results of our primary data collected, is a far cry from the true state of affairs. It is hoped that more of these major players will participate in the anticipated comprehensive nationwide survey.

REFERENCES

OECD, 2002, *Measuring the Non-Observed Economy: A Handbook*. OECD Publications Service, Paris, France. See also the work of ILO on 'underemployment and its measurement

UNESCO Institute for Statistics (2009). *Framework for Cultural Statistics*. Paris,

2 UNCTAD (2010). *The Creative Economy Report Creative Economy: a Feasible Development Option*. Geneva/New York: UNCTAD/UNDP

UK (2001) *Creative Industries Mapping Report*, Department of Culture, Media and Sport

UK (2007) *Creative Industries Mapping Report*, Department of Culture, Media and Sports

UK (2011) *Creative Industries Economic Estimates*, Department of Culture, Media and Sports.

APPENDIXES

S/No	Description	Page Range
1	Table of Clusters Studied in Lagos	40
2	Establishments Listing Frame	41-100
3	Households Listing Frame	101-143

TABLE SHOWING NUMBER OF CLUSTERS STUDIED IN LAGOS AND THE DISTRIBUTION OF RESEARCH INSTRUMENTS AND ENUMERATORS ACROSS THE STUDY AREAS*

Clusters	Establishment Listing Form	Household Listing Form	Establishment Questionnaire	Household Questionnaire	Selection Sheet	Number of Enumerators
ALABA	12	12	240	60	6	6
FESTAC	12	17	120	60	6	4
MUSHIN	18	18	243	60	6	6
OSHODI	18	18	240	60	6	6
AJEGUNLE	11	9	60	60	3	3
AGUDA	12	16	169	30	9	5
ADENIRAN OGUNSANYA	13	9	180	60		5
OJUELEGBA	10	16	180	63	6	5
BODE THOMAS	20	10	180	60	6	5
OPEBI/ALLEN	8	10	180	60	6	6
IKEJA/AWOLOWO	9	12	180	30	2	6
OJODU	9	12	180	60	6	6
AGEGE	9	10	180	60	5	6
ALAUSA	9	13	180	64	6	6
IGBOSERE/ ISALE EKO		30		155	15	6
BROAD ST/APONGBO	18		300			6
IDUMOTA/EREKO/BALOGUN/DOSUNMU/OLUWOLE	12	6	200	30	3	5
OBALENDE	9	4	180	60	9	5
IKOYI/VICTORIA ISLAND	847		1183		216	97
TOTAL	1056	222	4375	1032	316	124

***NOTE: The above figures exclude the online questionnaires retrieved**