



SHIFTING THE JOB NARRATIVE:

Unlocking the Creative Economy for Youth Employment

A skills needs anticipation study of the creative sector in Mombasa, Kenya

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1. EXECUTIVE SUMMARY

Youth employment is undoubtedly one of the most discussed and important issues for governments, educators, private sector, and development actors around the world. The opportunity of unlocking the potential of hundreds of millions of talents and abilities while striving for inclusive and sustainable economic growth is a vision that aligns with the UN's Sustainable Development Goals and aspirations of countries and their citizens. All too often however, the jobs that are available and recommended for young people are not leveraging their talents nor their aspirations and interests. The key drivers of economic opportunity today and the foreseeable future are often in backbreaking, risky, and repetitive labour including agriculture, construction, manufacturing, and mining. Young people are often shepherded into entry level jobs be it in security or household work that have little to do with their talent and with limited career options. Even the often-touted ICT or "future of work" sector ends up with the modern-day equivalent of the farm, except these are computer "farms" with large rooms of hundreds of young people sitting at desktops labelling data or cross-checking data reports.

Young people rarely aspire to these kinds of jobs and are instead drawn to activities and careers that are often in the creative fields. All too often however, outside of select few such as the late Sir Ken Robinson, the majority of society, education and training providers and those in youth employment and development discount these aspirations while pointing to the "real world" and the real job opportunities that exist.

This report, the result of a partnership between Global Development Incubator and the Global Apprenticeship Network, flips this narrative and starts with the aspirations and talents of the youth. Leveraging the partnership that we enjoy with the Global Opportunity Youth Network (GOYN; a global initiative for youth employment), the team focused on Kenya, which despite a growing middle class is witnessing a massive 'youth bulge' with a median age of 20.1 (Worldometer, 2020) and an average of 800,000 young people entering the job market each year (Business call to action, 2017), with only 76,000 formal jobs created annually in 2019 (Mwita, 2020). The work narrowed in on one of the core GOYN communities in Mombasa. Mombasa is an urban city-county with a young population comprising 565,000 of the 1.3M population of whom over 40% are unemployed (GDI, 2019).

Through eight months of GOYN research, extensive interviews and surveys with the youth in Mombasa County, it became clear that a core aspiration for the youth is to work in the creative field and this aspiration is reflected in the thriving creative works evident throughout the county and its capital city. Further, for the youth of Mombasa, this is not a hobby nor just a passion but a pathway towards making a real living. However, for most youth, making a living in the creative sector is challenging due to a variety of factors including fragmented and small scale efforts, poor equipment quality, a dearth of places and channels to display their talents, a limited understanding of how to monetise their creative efforts and challenges in building the skills required for creative sector careers.

Further, there is limited understanding amongst government actors, private sector investors, educators and development actors that there are jobs and money in the creative field.

However, a detailed analysis both globally and in Kenya shows that there are significant business opportunities in the creative industries that align with youth interests.

This report is structured to accomplish four key objectives:

- **Define the creative sector:** Provide an overview of what is included in the "creative" sector, including the breadth of jobs roles, business opportunities and economic value of this sector, globally and in Kenya.
- **Summarise youth interests in the creative field:** Clearly lay out the youth interests and aspirations in the creative sector.

"Creativity is as important as literacy"
Sir Ken Robinson



Figure 1 A poster for "Art Attack", an art event by Pwani Youth Network

- **Estimate creative job opportunities today and in the future in Mombasa:** Set up the size of the opportunity for youth in the creative sector in Mombasa, Kenya, including job types, roles, skills and financial benefits, covering those that are possible today and in the future.
- **Outline recommended pathways for realising these job opportunities:** Develop the set of pathways that would facilitate young people to access creative jobs that could lead to sustainable livelihoods and outline the role of different ecosystem actors.

The project team hopes that this report is just the beginning of stakeholder discourse and the development of the creative sector as a viable and exciting economic pathway that leverages the aspirations and interests of the youth. We welcome the youth employment community and players including, government, donors, investors and education/training providers to seriously re-evaluate the potential of the creative sector to unlock economic value in a more inclusionary and sustainable way. We look forward to working together on this journey in Mombasa and beyond.

2. ACKNOWLEDGEMENTS



Figure 2 Large scale artwork from Mr. Green, artist in residence at Swahilipot Hub Foundation, Mombasa, Kenya

We would firstly like to thank and acknowledge the young artists and visionaries whose creative talents inspire us every day. They toil at their craft through long hours and often with limited acknowledgement or praise and mostly without adequate remuneration. We wish to thank them for putting their creative energy out into the world to make it more colourful for us all. We hope that we can make a difference in their lives and enable them to cultivate their talent and pursue their passion.

We would also like to thank the hours and efforts of the participants of our interviews and workshops, whose names you can find in the appendix. Their insights have been invaluable in this study. We must also give a special mention to the 502 Mombasa youth for lending their voices to this report.

The Global Development Incubator (GDI) in partnership with the Global Apprenticeship Network (GAN), the Global Opportunity Youth Network (GOYN), and Swahilipot Hub authored this report. GDI (globaldevincubator.org) is a non-profit organisation operating in Kenya with affiliate partners in the United States and Asia. GDI is an incubator for transformational ventures and multi-stakeholder partnerships working to build and scale the next generation of social impact solutions. GAN (gan-global.org) is a business-driven alliance with the overarching goal of encouraging and linking business initiatives on skills and employment opportunities for youth - notably through apprenticeships, work-readiness programmes and work-based training. Global Opportunity Youth Network, hosted at Aspen Institute, is a global initiative catalysing systems shifts for opportunity youth (ages 15-29 who are out of school, unemployed or working in informal jobs). GOYN (aspencommunitysolutions.org/global-opportunity-youth/) focuses on place-based collective action efforts in communities around the world through the creation of sustainable training, employment and income-earning pathways.

We would also like to thank our partners, the SwahiliPot Foundation (swahilipothub.co.ke/) and Pwani Youth Network (nayd.org/pwani.htm) that have contributed to this report.

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3 METHODOLOGY



Figure 3 Mombasa youth and creative stakeholders at a roundtable discussion

In 2019, the Global Opportunity Youth Network (GOYN) held a series of consultations, which identified gaps in the knowledge of Mombasa's economy, with a focus on youth employment. One of those gaps is the mismatch between skills/demand in the creative sector. Focused on Mombasa County, this project, developed by the Global Development Incubator with technical and financial support from the Global Apprenticeship Network complements assessment and research activities conducted by GOYN to identify current and future in-demand skills in the creative sector, the coexistence of different stakeholders in the skilling landscape and ways in which they become partners and propose strategies for boosting employability ways in which they become partners and propose strategies of vulnerable youth.

This report leverages primary and secondary data sources to understand the context of the creative sector in Kenya with a special focus on Mombasa County. The study methods used included desktop research, one-on-one interviews with over 20 industry experts in Nairobi and Mombasa, roundtable discussions with over 20 stakeholders in Mombasa and Nairobi, and a survey targeting over 502 youth in the creative sector in Mombasa conducted by youth (see below). Analysis focused on identifying gaps and opportunities in the sector for youth working in it or wishing to enter it.



Figure 4 Overview of data sources leveraged for the report

The Delphi research method and the Skills Anticipation methodology designed by the National Industrial Learning Service (Serviço nacional de Aprendizagem industrial – SenAi) of Brazil were adapted for the research that underpins this report. The methodology includes tools such as Expert Panels, Sectoral Experts, and secondary data analysis (International Labor Organization, 2013). Each data source explored various elements of five key themes of the SenAi methodology

Themes	Description of objectives	Desktop research	One-on-one interviews	Round table discussions	Youth survey
Technological dissemination trends	• Identify specific emerging technologies (SeTs), i.e. developing innovations that have been recently launched into the market (evolution of the state of technology)	✓			
Analysis of emerging occupations	• Identify sectoral occupational changes in the Creative Economy. Emerging occupations constitute a set of activities, knowledge, capabilities and skills that are either: i) entirely new (e.g. new categories, new titles) or ii) evolving (i.e. whose work content triggers changes; represented by old titles with new work content)	✓	✓	✓	✓
Analysis of occupational impact	• Identify and evaluate, with representatives of businesses, universities and other participating organisations, the probable professional profile changes arising from the introduction of specific emerging technologies and the organisational changes identified.	✓	✓	✓	✓
Analysis of occupational trends	• Analyse occupational trends to estimate changes in the number of jobs in different sectors of the economy	✓	✓	✓	✓
Analysis of educational gaps	• Analyse comparative student skill levels and profiles demanded in different scenarios	✓	✓	✓	✓

Figure 5 Skills anticipation topics covered by different data sources according to the SenAi methodology

3.1 DESKTOP RESEARCH

Various secondary data sources including international reports by the International Labour Organization (ILO), United Nations Conference on Trade and Development (UNCTAD), United Nations Educational, Scientific and Cultural Organization (UNESCO), and British Council, were leveraged in the writing of this report. Local data sources include the Ministry of Sports, Culture and Heritage, the Kenya National Bureau of Statistics (KNBS), articles published in reputable newspapers such as the Business Daily, HEVA Fund and HIVOS International. Research also included mapping out stakeholders, funders, and benchmarked festivals across the country. Some examples of key stakeholders and funders are given in the tables below.

Policy makers	Associations and guild	Academia and research	Enablers
<ul style="list-style-type: none"> Ministry of ICT Ministry of Sports, Culture and Heritage National Senate County Assemblies Activists and Lobbyists 	<ul style="list-style-type: none"> Music Copyright Society of Kenya Kenya Copyright Board Kenya Film Commission Kenya Film Classification board Creative Economy Working Group 	<ul style="list-style-type: none"> Universities TVET institutions Secondary Schools Tertiary colleges Private tutors 	<ul style="list-style-type: none"> Creative spaces and hubs, e.g. the Go Down Arts Centre Donors e.g. Hivos, HEVA Fund Development partners e.g. British Council, SIDA Private sector such as Safaricom through event sponsorship Consumers

Fund name	Funding source	Description
Kenya National Film Fund	Ministry of ICT	The fund helps the youth in development, production, and marketing of local film content.
Kenya COVID-19 Response	GoKenya	The government through the Ministry of Sports, Culture and Heritage has earmarked KES100 M (US\$944,287) from the Sports Fund to be disbursed to artists, actors, and musicians for the provision of entertainment through broadcast media and digital platforms due to loss of income in the wake of COVID-19.
New Arts New Audiences NANA)	British Council, Kenya	This is an annual grant for East African creatives aged 18-35.
The Kenya Film Competition	Kenya Film Commission	Offers opportunities to local filmmakers by funding productions and introducing them to a regional network of peers.
Mobility East Africa Travel Grant	British Council, Kenya	This grant gives creatives a chance to travel and attend art and cultural events across East Africa and document their experience while connecting with other East African artists.
Fashion Product Lab	Metta Nairobi.	An eight-week incubation and mentorship programme for fashion designers. They also enjoy access to financial aid.
Filmmakers Without Borders	Filmmakers Without Borders	This grant funds films centred on justice and empowerment themes.
World Cinema Fund	Germany	The grant is administered by the Federal Foundation for Culture and in cooperation with the Goethe Institute, the Foreign Ministry and German producers. It seeks to support filmmakers from regions with weak film infrastructure.
Hubert Bals Fund	Hubert Bals Fund	The fund supports international filmmakers in various regions including Africa.
Blue Ice Documentary Fund	Hot Docs	Hot Docs provides funding to African filmmakers in order to empower them to tell stories that contribute to the creation of a new generation of African Documentary film making.
Alter-Ciné Foundation	Alter-Ciné Foundation	The foundation offers C\$10,000 to filmmakers born and living in Africa, Asia, and Latin America.
HEVA Fund	HEVA Fund	Invests in the social and economic potential of the creative economy in the East African region.
Creative DNA	British Council funded by FCDO	Promotes alternative and innovative approaches to the global fashion system with the ambition of demonstrating that the fashion sector in Kenya is a professional choice for young people and a valuable contributor to the creative economy.

3.2 ONE-ON-ONE INTERVIEWS

Interviews were conducted with 21 key stakeholders (10 in Nairobi and 11 in Mombasa) within or adjacent to the creative industry.. Subjects included: key institution representatives, funders, performing artistes, music producers, filmmakers, actors, hub managers, fashion designers, and visual artists. All stakeholders were asked questions about creative skilling utilisation and trends, impact and use of technology, institutional and financial support, policy and regulation, and monetisation of the sector.

3.3 ROUNDTABLE DISCUSSION

The sessions were conducted in Nairobi and Mombasa and targeted 20 stakeholders, 9 in Nairobi and 15 in



Figure 6 Creative sector stakeholders in a discussion, Nairobi

Mombasa. The sectors represented during the sessions were: art funders, musicians, producers, fashion photographers, film producers, fashion designers, visual artists, media commentators, trainers, band performers, hub managers, development sector stakeholders, government departments and training colleges. The structure of the roundtable discussion allowed for brainstorming, personal accounts, sharing experiences on challenges and opportunities, and even giving possible solutions to some of the gaps. The discussion was guided by four main themes, namely: skills, policies and regulation, commercial viability, and creative sector value chains. Having the creative youth in the room adds colour to this report.

3.4 Youth survey

The GDI and GAN teams trained a group of Mombasa youths to administer an electronic, cell phone-enabled survey to 502 young local creatives. The survey consisted of closed and multiple-choice questions, which sought to determine why and how people enter the creative industry, their earning potential, and skills evolution. Data collectors used the snowball sampling technique to identify respondents between 15-34 years in the following sub-counties: Kisauni, Nyali, Mvita, Likoni, Changamwe and Jomvu. The questionnaire was written in English and reviewed by data collectors during the data collection training session held at the Swahilipot Hub in Mombasa. It was administered in English or Swahili, depending on the respondents' preference. Caveat: The survey did not target creatives who enjoy fame and recognition on the national or international scene. Those artists would skew the insights as they are the minority in the sector.

3.5 REPORT STRUCTURE

The report is structured into three parts:

1. Research Summary: This section provides an overview of the creative sector from desktop research and includes the definition of the sector, global market size and growth rates. It also frames the creative sector by its different value chains (e.g. film, music, and fashion), its enablers (e.g. skills and research, policy, and distribution structures), and value activities (e.g. creation, production, and dissemination). The findings section also deep dives into the Kenyan creative landscape, highlights high-level insights from stakeholder interviews and roundtables, and outlines demographic data on youth surveyed (e.g. age, sex, education level and employment status).

2. Opportunities and Challenges: This section gives context on Mombasa's historical, cultural, and economic factors, and the relevance of the creative sector in the county. It takes a deeper look

at youth interests and their participation in the creative sector, as informed by the survey. It also examines how skills have evolved in Mombasa including dying art forms and future skills required by youth creatives. Additionally, by leveraging insights from stakeholder interviews and roundtables, it maps out systemic challenges and opportunities, including analysis of job roles across different creative value chains, potential income level per job role, and assumption-based modelling of the number of jobs that can be created in Mombasa's key creative sub-sectors.

3. Recommendations: This section puts forward recommended pathways for realising these job opportunities and strengthening the ecosystem (e.g. skills development).

4. COVID-19 AND ITS IMPACT ON THE CREATIVE SECTOR

Since its confirmation as a global pandemic and Kenya's first registered case in Kenya in March 2020, COVID-19 continues to ravage communities, with negative economic impacts to the travel, and entertainment industries, restaurants, festivals, live performances, exhibitions, gaming, and entities in their supply chain. Outcomes include mass layoffs and furloughs further exposing the vulnerable, low-income earners and the self-employed to diminishing livelihoods. Among this demographic group are informal labour market and gig workers.

Further to this, the creative economy has experienced significant disruption brought about by restrictions on in-person gatherings (Uhuru, 2020). These blows have been sustained by live music shows and events, film and theatre, fashion and apparel, exhibitions, general cultural heritage institutions and gaming among other immersive experiences.

In a recent report by HEVA Fund based on research conducted across seven counties in Kenya including Nairobi, Mombasa, Nyeri, Kiambu, Kilifi, Machakos and Kajiado, showed that 97% of artistes have been directly affected, with 34% experiencing cancellations and 29% experiencing postponements of events, orders and performances. 6% laid off staff, 76% registered instances of financial loss with 80% projected losses should the crisis extend into the second quarter. (HEVA Fund, 2020).

There are some hopeful prospects however; the pandemic has changed how creative goods are consumed and there has been an extraordinary increase in subscription of on-demand music and film platforms, social media activities and online shopping for creative goods and contents (UNCTAD, 2020). It is anticipated that the findings in this report will be presented in a COVID resilient world with additional opportunities to be realised in content that is consumed through online and digital formats.

5. OVERVIEW OF THE CREATIVE SECTOR

For our research summary, we start with defining the scope and opportunities of the creative sector. The summary is structured into three areas:

- 1) **Market overview:** market definition, size of the market, growth rates, and opportunities
- 2) **Creative value chains** and cross-cutting enablers
- 3) **Youth profiles** of participants in the creative space in Mombasa

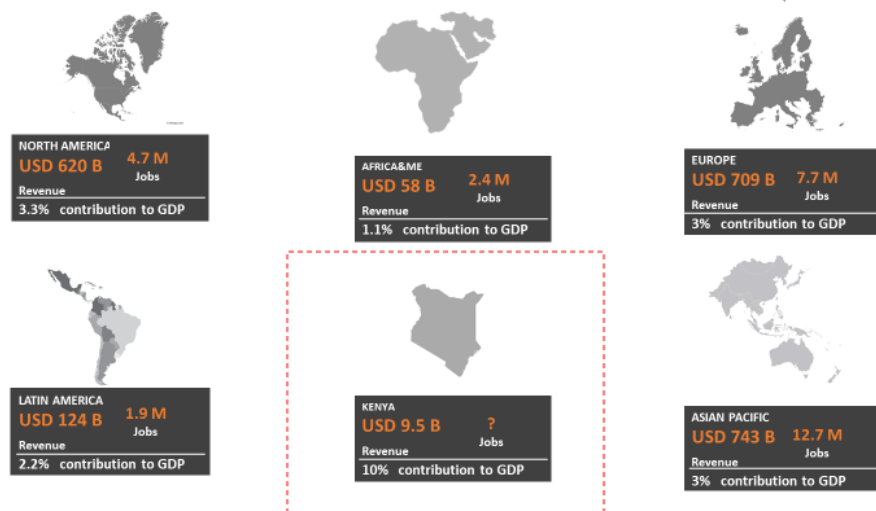
5.1 Market overview

The scope and definition of the creative sector is varied across the world. However, it must meet the below criteria (Buitrago and Daque, 2013):

- i. Creativity, arts, and product endeavours
- ii. Product strongly related to intellectual property rights, and in particular, copyright
- iii. Activities with a direct role in the value chain by transforming ideas into products

According to the United Nations Conference on Trade and Development (UNCTAD), the Cultural and Creative Industries (CCI) refer to those parts of the modern economy where culture is produced and distributed through industrial means, applying the creativity of individuals and groups to the generation of original cultural products, which may have commercial value either through direct sale to consumers or as intellectual property (UNCTAD, 2008)..

Globally, the creative sector contributes significantly to the economy and employment growth. The creative economy employed 30 M people worldwide and generated \$2.25 trillion (3% global GDP). This is greater than the global telecommunications sector (\$1.57 trillion). Television was the largest earner with \$477 billion in revenue, followed by visual arts and newspapers and magazines accounting for over \$1.2 trillion together, and accounting to 54% of the total for the creative economy worldwide. Africa and the Middle East contribute US\$58b in revenues (3%) and 2.4 million jobs (8%) to the global creative economy.



The creative economy also has strong synergies with other sectors such as tourism, hospitality, and trade. For example, domestic and international tourists are key consumers of creative products and services like cultural crafts and souvenirs, dance, and theatre. Additionally, hotels and restaurants serve as catchments for live performances. Creative products e.g., films, music, and crafts are also often exported.

Kenyan creative market: There is no clear definition of Kenya's creative industry with various sources indicating different data points. A 2016 report on Micro, Small and Medium Enterprises (MSMEs) in Kenya, estimated that 0.8% of all MSMEs were in the arts, entertainment, and recreation sectors (KNBS, 2016). While the report does not provide an exhaustive breakdown it does include 'creative, art and entertainment activities' as well as 'libraries, archives, museums, and other cultural activities' (KNBS, 2016). There is possibly a 'lost definition' of the creative industry where for instance roles in film and digital media are categorised under information communication and technology (ICT), crafts under manufacturing, and creative sales distribution functions under trade and retail. According to research conducted by the World Intellectual Property Organization (WIPO), the Kenyan creative economy contributes to 5.3% of Kenya's GDP (WIPO, 2014) and \$1.2B in dollar value (World Bank, 2014). Projections by the British Council indicate that with necessary support, the sector could contribute 10% to the Kenya GDP in 2020 (Manyala, 2016). This report will assume that the creative industry contributes between 1% to 5% to Kenya's economy, for purposes of quantifying potential creative job opportunities.

5.2 CREATIVE VALUE CHAINS, ENABLERS, AND KEY ACTIVITIES

The creative universe can be viewed through two lenses:

- i) Individual value chains like film, music, and fashion.
- ii) Cross-cutting enablers like skills development, policy, funding, and monetisation structures.

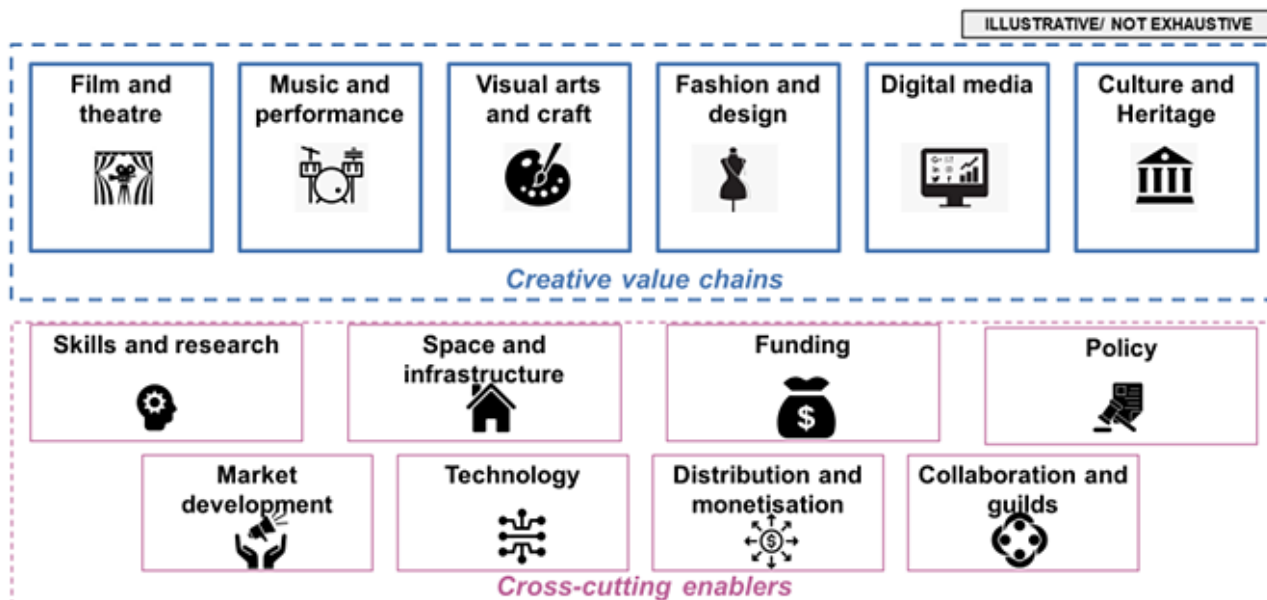


Figure 7 Creative landscape organised by creative value chain and cross-cutting functions

The core activities across creative value chains, can be categorised broadly into creation, production, dissemination, and exhibition. Additionally, there are supporting functions such as, education and training, management and regulation and preservation.

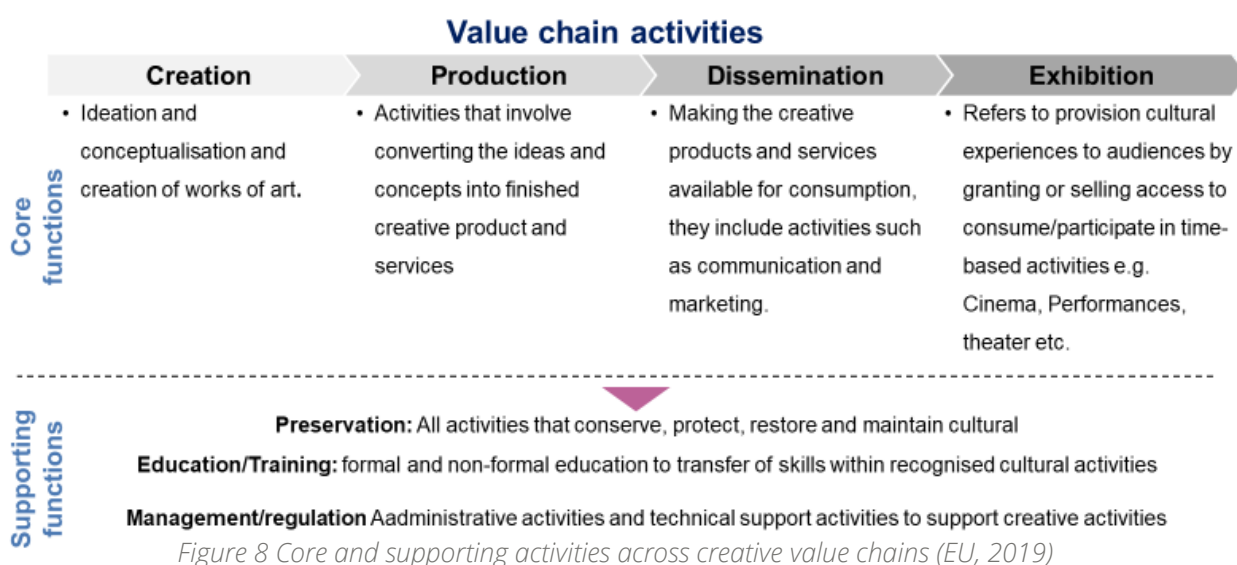


Figure 8 Core and supporting activities across creative value chains (EU, 2019)

5.3 CONTRIBUTION TO THE LABOUR FORCE AND ECONOMIES

According to a report by EY (2015), the creative economy is a significant contributor to the global workforce. The visual arts emerge as the highest employer worldwide with 6.7 million people followed by books and publishing, performing arts and T.V[KN1]. If the creative sector were a country, it would have the 4th largest workforce and be the 9th largest exporter of goods and services (Buitrago and Daque, 2013).

In the book Orange Economy, Luzardo et al. (2017) reported that in 2015, the creative sector generated 1.9 million jobs in Latin America and the Caribbean, and revenues of \$124 billion, further, they indicated that most creative

start-ups in the region result in a high social and economic impact in traditional sectors such as health, education, and transportation.

The size and opportunities of the creative sector are not often understood by governments, investors, and youth employment advocates, except in some countries such as Nigeria and Canada that have actively fostered the creative fields. In Nigeria, the film industry is responsible for more than 300,000 direct jobs, and is the largest employer after agriculture (EY, 2015).

Youth and women make up a significant part of the creative economy. In Ghana and Uganda, more than 25 percent of people in the creative economy are youth. The share of youth in cultural occupations is larger in low-income countries than in advanced countries (World Bank, 2020). Women are major contributors too, with more women than men being involved in cultural work in low- and middle-income countries (World Bank, 2020).

People often think about creative work narrowly, as just individual artists singly executing their roles. Indeed, when considering the typical broad 'strata' of artists, most think of the creative sector as high visibility, and medium to low visibility formal and informal artists, either at the top of their game or often struggling to succeed and make a living.

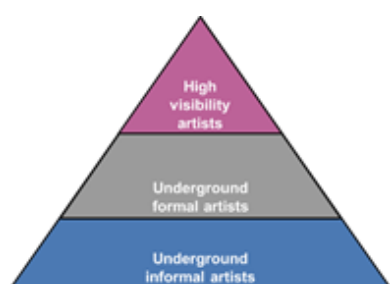


Figure 9 Stratification of artists in the creative sector

High visibility artists: This class consists of high-flying creatives. They have international reach, are educated, and run their creative businesses with a team of highly trained assistants. They include artists such as SautiSol, Lupita Nyong'o, and Michael Soi in Kenya. This category of artists enjoys an international audience connected to them by agents.

Medium/low visibility formal artists: These artists may not have an international platform, but they are popular among the locals enabling them to earn a living entirely from their creative works. Kenya's Ithera Fashions [KN1] and Samidoh are such examples. This category also includes popular performers famous in vernacular radio and TV. A good example is Riverwood Productions, which produces low quality vernacular films that are popular in Kenya's countryside.

Medium/low visibility informal artists: This segment consists of creatives running informal businesses; they mostly perform at small events or sell their products on the streets. This group includes street performers and street vendors as well as those supporting their work.

However, the more appropriate way to think about the creative fields is as possessing large business clusters with robust value chains in each of the domains similar with any other industry. There are over 150 job roles across the different creative value chains (see appendix).

5.4 BEST PRACTICES FROM VARIOUS MARKETS

Short case studies from various markets highlight best practices in the creative sector. Countries like Nigeria, South Africa, Brazil, India, and Canada offer inspiration examples of top-down and bottom-up interventions and innovations in the creative sector.



Art Banks: Canada Private Public Partnerships

In 1972 the Canada Council for the Arts established the Art Bank a division mandated to purchase artistic works and rent them out to government and corporate organisations across the country. A significant portion of the bank's collection of over 17,000 paintings, prints and sculptures is on public exhibit in Canada and across the globe. This is made possible through the Art Bank's art rental, loans to museums and outreach projects. The collection comprises pieces bought from over 3000 artists and is valued at more than \$71 million (Art Bank, n.d).

The Canadian government also donated space on the Toronto waterfront that ultimately resulted in the establishment of CineSpace Film Studios that catalysed the growth of Canada's film industry.



Tax Incentives: South Africa Art

South Africa offers a 35 % tax rebate on all filming projects undertaken in the country (Daily Nation, 2018). An additional 5% of Qualifying South African Production Expenditure (QSAPE) is provided hiring at least 30% of black South African citizens as head of departments and procuring at least 30% of QSAPE from 51% South African black-owned entities which have been operating for at least one year (DTIC, nd).

This has positioned the country a favourite filming destination for many international filmmakers.



Policy frameworks: Brazil Rounet law

The law was created to encourage individuals and companies to donate, consume, or sponsor national cultural activities. Individuals and companies investing in cultural activities get relief for part of their payable income tax of up to 6% for individuals and up to 4% for organisations. (Bruha, 2014)



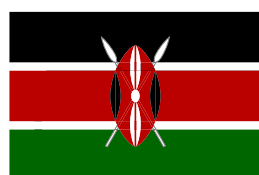
Investment by World Bank. Nigeria Nollywood

The Nigerian film industry employs over one million people making it the nation's largest employer outside agriculture. It makes a profit of approximately \$500 million producing an average of 1,500. In 2010 the World Bank injected \$20 Million through the Growth and Employment in States Project (GEMS), a federal government project that sought to support key industry clusters including the entertainment industry for its huge potential in terms of job creation and value creation (World Bank, 2011)



Safe art spaces: Swahilipot Hub, Mombasa, Kenya

Located in Mombasa, the Swahilipot Hub is a GOYN partner and provides a safe space for artists and creatives including those from a technology environment. The centre provides infrastructure including space, Internet access, and even computers and other pieces of equipment, in addition to training and mentorship for youth interested in entering the creative sphere. Further to this, it hosts the Pwani innovation Week and Pwani Got Talent gala that recognise and award young people for exemplary work in their respective fields. Projects like Tech Kidz Africa hosted at the hub recruit, train and mentor children in different disciplines.



Safe art spaces: Go Down Arts Centre, Nairobi, Kenya

The Go Down Arts Centre provides space for different artists. It features studios for fine, musical and visual artists. Additionally, the centre promotes the professional development of artists through training, workshops, mentorship, and provision of equipment. Renowned artists such as Michael Soi have developed their body of work to global standards in their time at the centre. To support innovation and collaboration, local artists are linked to global fellowships and visiting artists from can take up residence at the centre.



Ethical micro-contractor/ apprenticeship program: India

This program provides ethical training and business development support to construction micro-contractors, incentivising them to eschew forced labour. During the program, micro-contractors are required to mentor 8-10 artisans in return for financial incentives. This has improved the quality of work, increasing demand for services, and reducing vulnerability and exploitation of young people entering the sector (Pratham and GFEMS, n.d.). Although this model is currently used in the construction industry, it can be applied to the creative sector where a master craftsperson receives entrepreneurship training and mentorship, contracts, loans, and other incentives, and is required to mentor a team of creative apprentices. This results in capacity building, access to financial resources, access to markets (through contracting), and development of a trusted brand for the master. The apprentices, benefit from training, dignified work and income, access to networks, and a chance to build their portfolio. Potential use cases for micro-contracting could be a sitcom filming crew, a fashion design group, and a festivals planning team.

*Businesses in the arts,
entertainment and recreation sector
had the highest average business
life of 10.1 years (KNBS 2016 MSME
report)*

5.5 DEEP-DIVE ON THE CREATIVE LANDSCAPE IN KENYA

According to the Kenya Institute for Public Policy and Research (KIPPR), MSMEs contribute over 90% of the labour force (KIPPR, n.d.). According to KNBS, about 94,000 people were employed by MSMEs in the arts, entertainment, and recreational sector, nationally (KNBS, 2016). If 1-5% of these are in the creative sector, it can thus be estimated that the sector employs over 94,000 to 470,000 people nationwide. Creative businesses are also said to have the greatest longevity in Kenya.

To further understand the current and future job needs, roles and skills across these business clusters, it is critical to understand the creative value chains. The Kenyan landscape has several players across various creative value chains and enabling functions.

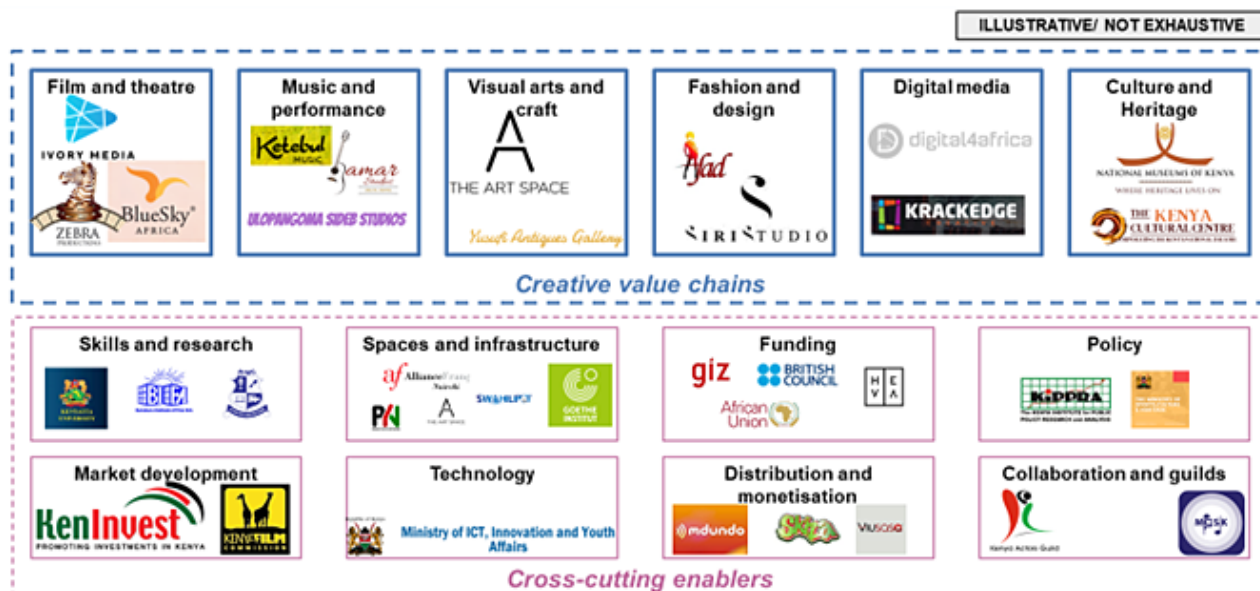


Figure 10 Examples of players in the Kenyan creative landscape

5.5.1 Creative value chains in Kenya

According to a 2014 WIPO report, the Kenyan creative economy contributed 5.3% of Kenya's GDP. Applying 5.3% to Kenya's nominal GDP in 2014 results in an estimated value of \$3.2B. The World Bank estimated the value of the Kenyan creative sector to be \$1.2M in 2014 (World Bank, 2014). The reports, however, do not provide a breakdown of the value according to different sectors that constitute the creative economy in the county. To begin the analysis, we first break down the details and backgrounds of each of the creative domains and value chains. It should be caveated that these data points are gathered from different sources whose market definition may vary and should thus be used only as directional as they do not precisely add up to the top-down values.

- Film and theatre: \$87.5M (Kenya Film Commission, 2011)
- Music and performance: \$28.9M (PWC, 2018)
- Visual arts and crafts: No available data.
- Fashion and design (including textile): \$414M (Equity, 2016)
- Digital media: \$2.34B (Frost & Sullivan, 2017) Culture and heritage: \$1.2M (Department of Culture, 2012)

Film and theatre



Figure 11 Young theatre actors on stage (Swahilipot Hub)

The film industry in Kenya constitutes local and foreign film and video producers, film and video producer support service providers, film funding companies and investment companies, film distributors and film and television commercial producers (Manyala, 2016).

According to the Kenya Film Commission, the industry makes direct and indirect contributions to the GDP, employment, and employee income. In 2011, the film industry contributed 2.45 and 2.22% to the GDP directly and indirectly, respectively. The number of people employed in the industry increased by 49% between 2005 and 2011 (Kenya Film Commission, 2011).

Music and performance



The music industry in Kenya ranges from traditional to contemporary music and is composed of music creators, musical arrangers and performers. The industry includes sound, audio-visual recording companies, managers, music trainers, publishers, promoters, and distributors.

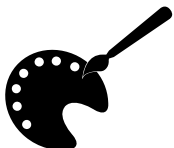
Emerging digitalisation of almost every activity from production to distribution of musical works is evident. E-commerce technology has emerged as the main form of distribution. The 40% 'local radio broadcast rule' directing local media

houses to play local music in their stations resulted in a spike of local content on the airwaves (Local content bill, 2018). According to a PWC report on entertainment and media outlook, Kenya's music market was worth USD 19.9 million in 2014, up from USD 17.8 million in 2010. Annual revenue was forecast to rise to USD 28.9 million in 2019 and USD 30 million in 2020 (PWC, 2018). There is growing investment in live music and events with notable festivals such as the Koroga Festival, Blankets and Wine, Safaricom Jazz Festival, Groove Awards, and Sauti Ya Pwani in Mombasa.



Figure 12 A group of three performs at a music event in Mombasa (Swahilipot Hub)

Visual arts and crafts



The arts and craft industry is a major driver of employment especially for women and youth. The main components of the industry include wood and stone carving industries, visual and graphic art industries, performing art, and the emerging creative art industries such as storytelling, poetry, and paintings. Artists cite the sale of their work as their primary source of income. Jobs include commissions to create large-scale sculptural pieces, or murals for the public realm. The expansion of shopping malls, hotels and real estate are big drivers in providing lucrative opportunities in this field.

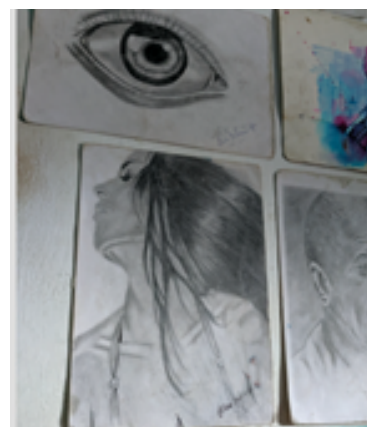


Figure 13 A collection of drawings (Pwani Youth Network)

Additionally, photography has emerged as a growing discipline in this space and is fuelled by the accessibility to and affordability of smartphones and cameras resulting in creative and diligent photography, raising the bar by combining the significance of art, history, storytelling, and digital awareness to produce high quality photographs and reaping handsome business returns. (Smartnewskenya, 2016)

Fashion and design



Kenya's Industrial Transformation Programme 2015 categorises the fashion industry under Textile and Clothing (T&C) sector, which contributes a modest 0.6% to the GDP (Ministry Of Industrialisation and Enterprise Development, 2015).

According to HIVOS (HIVOS, 2018), the fashion and design industry in Kenya is anticipating strong growth in the next 10 years, as confirmed in the study report on the Kenyan textile and fashion industry (Equity, 2016) that highlights the value chain as a source of gainful employment through roles like fashion designers and tailors.

Visual arts and crafts



Digital media encompasses all media activities that use electronics devised for its distribution (Digital Logic, n.d). Different forms of digital media such as radio, podcasts, audiobooks, video platforms such as TV and streaming sites like Netflix and YouTube, and social media sites are popular in Kenya (TIFA, 2019). The sub-sector growth is contributed by growth in access to the internet (TIFA, 2019). In 2017, the Communication Authority of Kenya (CAK) indicated that Kenya has 51.1 Million broadband users (CAK, 2018). Internet penetration in Kenya stood at an estimated 97.8% (CAK, 2018).

Culture and Heritage



Categories under cultural and heritage in Kenya include: heritage sites, performing arts venues, visual art centres and exhibits, festivals and special events, religious sites, rural destinations, indigenous communities and traditions, arts and crafts, language, gastronomy, and industry and commerce sites (Development of Culture Tourism, n.d.)

Across Kenya, museum activities and operation of historical sites, buildings and monuments employ more than 1,043 people. In 2012, all museums received a total of 700,520 local visitors and 131,002 foreign visitors. The same year the total amount of revenue generated from the visitors was USD 1,211,928. Domestic visitors have significantly increased, indicating growing domestic appetite for cultural learning (Department of Culture, 2012).



Figure 14 Young performers put on a show for cultural dance in Kenya

Culture and heritage are deeply embedded in the tourism sector, which contributes 10.5% to the Country's GDP (World Travel and Tourism Council, 2015) and more importantly, contributes significantly to job creation. It is therefore a powerful driver of economic growth with multiple backward and forward economic linkages. The sector is also highly sensitive to forces such as terrorism, global economic changes, and global pandemics such as COVID-19.

5.5.2 CROSS-CUTTING ENABLERS IN KENYA (INFORMED BY KEY INTERVIEWS AND ROUNDTABLES)

Creative value chains in Kenya are influenced (whether catalysed or impeded) by cross-cutting factors such as skills and research, spaces and infrastructure, funding, policy technology, monetisation and distribution, and collaboration. Some of these are more developed than others, as highlighted below. Additionally, there are gaps and opportunities across these factors, which will be discussed in more detail under "Challenges and Opportunities."

Skilling and research



Kenya has invested in skilling programs for the creative economy for over seventy years. In colleges and universities, investment is primarily focused on the traditional creative forms such as broadcasting media and journalism, according to expert insights. Art and Craft, for example, was one of the examinable subjects within the Kenya Primary School 8-4-4 curriculum, which was instituted in 1985 (KICD, 2018). It was then scrapped during a curriculum review in 2002 owing to recommendations that the current students had a heavy workload. The Kenyan Secondary School system then encouraged participation in the sector through optional examinable subjects such as music, art and design in select schools (KICD 2018). This decision, while well intended, created a gap in the interest and building of creative skills from an early age. The government has since corrected this through the setup of a new competency-based curriculum which reintroduced the arts into primary schools (KICD, 2017).

Though art and craft classes were removed from the curriculum the government continues to run programmes such as the Kenya Music Festival and the Kenya Schools and Colleges Drama Festival that were launched in 1959 to promote exploration of the youth's creative talents (KICD, 2018).

The vocational education system in Kenya lags in the support of the creative economy. The Technical Vocational Education and Training (TVET) sector has primarily focused on the technical subjects over the years (TVETA, 2018). The sector experienced a sharp decline in efficacy and trust from participants (Business daily, 2019). Within the last five years there has been a TVET reform agenda by the government to adapt curriculum to current skill needs of the country (TVETA, 2018).

Some tertiary education institutions are investing in the arts. These include the Kenya Institute of Mass Communication (KIMC), Kenyatta University, Nairobi University, and the Buru Buru Institute of Fine Arts (BIFA) among others. The Commission for Higher Education (CHE) has set the minimum criteria to join an arts program in select universities at a C+ (average) ; this is also the minimum requirement set by the government for high school graduates to be admitted to university. The higher education system's focus on the creative sector transformed with the launch of activities such as Kenyatta University's cultural week in the early 90s, a weeklong event which brought attention to the importance of skilling for the arts and has grown to be embraced by both public and private institutions of higher learning. Eight other universities have an annual cultural week or event around celebration of culture and creatives (list in appendix)

Market development and data



The creative market is highly fragmented and largely informal (KNBS, 2016). However, creative businesses have the longest lifespan indicating market potential that can be developed (KNBS, 2016).

When contrasted with markets like India, Nigeria, South Africa and Canada, Kenya has had limited market development of the creative sector.

There is limited market data particularly as it pertains to job opportunities for youth and return on investment in the sector.

Space, infrastructure, and asset



A few creative spaces and hubs exist in Kenya. The Go Down Arts Centre, and Kuona Trust Centre are some examples, and are all situated in Nairobi. Art galleries like Circle Art, One Off and the Art Space Kenya offer exhibition space, albeit often for elite artists. A few private studios exist for residency and ad hoc use (e.g. Saba Artist Residency in Lamu).

Interviews with experts and data from roundtable discussions show that there are few public spaces for creatives to practice their trade. Artists also lack supporting infrastructure such as access to art centres, tools, and equipment

Funding and investment



Funding for the creatives can be divided into two categories: (i) funding to organisations supporting artists such as the HEVA Fund and the Kuona Trust and (ii) funding to directly support the artists in content development. Many artists also fund their work through savings and peers as well as by taking on debt. There are minimal funding opportunities available to support creative ventures as the sector is mostly perceived to be high risk making it hard for banks and other financiers who are risk averse.

The Government of Kenya allocates a low budget to the Arts Department. During the 2019 budget, Kshs 7.9 billion was moved from the Ministry of Sports, Culture, and Arts and reallocated to universal health coverage (Capital FM, 2019). The largest portion of the money allocated to culture, which is hosted under the said Ministry goes to the sports department. The Ministry of Information and communications technology (ICT) recently announced a National Film Fund (Mukara, 2018). According to stakeholder roundtable discussions, however, there is no visible traction to the effort.

The development sector in Kenya has taken a lead in investing in initiatives that promote the creative sector. The British Council, German and French Embassies, Hivos, and the Swedish international Development Cooperation (SIDA) are among the leading supporters of the sector.

In 2018, Nairobi-based HEVA Fund signed a credit investment deal with the French development agency, AFD, to advance credit and technical support for Kenya's creative industries (HEVA, 2018b). As creative industries cannot provide collateral to secure loans, new de-risking tools allay financiers' fears of potential default and allow for capital flows

Government support and Policy

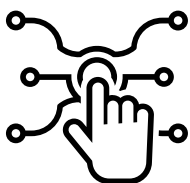


There are policy gaps in the creative economy in Kenya. However, interest is growing along the importance of the sector in offering employment opportunities to Kenya's youth in the main cities and counties (British High Commission, n.d.). In the last ten years, the government has introduced key reforms such as policies that enforce 40% local content requirement for radio and for television (Local content bill, 2018). Institutions such as the Music Copyright Society of Kenya, Kenya Film Classification Board, Kenya Film Commission, the Kenya Copyright Board among others have been set up to support the sector, according to expert interviews and roundtable discussions. Though there have been significant strides made, more can be done to create a policy environment that promotes the success of the participants of the creative economy.

In Kenya, there are a few laws that govern the creative industry. One such example is the Copyright Act 2001 (Act No. 12 of 2001). In addition, the National Policy on Culture and Heritage formulated in 2009 and launched in 2010 supports the enforcement of the Copyright Act. Together the act and the policy focus on five key areas in performing arts, intangible cultural heritage, conservation and promotion, visual arts, and design. They offer protection of literary works such as novels, poems, plays, reference works, newspapers, computer programs and databases, films, musical compositions and choreography, artistic works, advertisements, architecture, maps, and technical drawings. Though the act is in place, it does not keep up with technological changes that create many loopholes for revenue losses.

In addition, the government has instituted various tax laws that impact the creative industry. Under the current tax regime, the creative industry stakeholders experience taxes applied at the national and county levels. At the National level, the members of the creative economy are taxed directly with taxes such as income taxes, and indirectly such as VAT, filming levies, among others. County governments are also empowered by the constitution to impose property taxes, entertainment taxes, and any other tax as authorised by the county assembly (Public Finance Management Act, 2012). It can cost up to USD 1,500 to get just the permits for a shoot (Amalemba, 2017). This is in contrast to South Africa, for example, that offers incentives for film and TV productions. Some of the incentives include a tax rebate of 35% for South African productions that shoot and post-produce in South Africa, and foreign productions can receive between 20% to 25% of the South African spend (Variety, 2017).

Technology



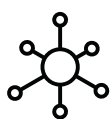
Kenya is known as the Silicon Savannah, a term widely used to refer to the Kenya Tech ecosystem (TechCrunch, 2015). Rising popularity of mobile services such as mobile money and social media has led to a mobile penetration rate of 97.8% as of June 2018 (Communication Authority of Kenya, 2018). Internet infrastructure has been a government priority for the last decade and has huge benefits lowering the cost of internet in addition to increasing internet cover across the country. This has driven the demand for digital goods and services in Kenya.

First, technology has simplified the distribution channels for creative works in music, film, and visual arts. Music for example is now distributed digitally directly to people's phones using platforms such as Mdundo, Boom Play, Apple music, Spotify, Skiza tunes and Mookh.com among others. Video platforms such as Instagram and YouTube have been leveraged by the creatives to create a following that they can then monetise. Platforms like YouTube have also become favourite platforms to distribute music. Sauti Sol, for example, earned USD 280,000 for their hit song "Nishike" on YouTube after they hit a million views becoming the most watched and listened to song in Kenya in 2014 (Business Daily Africa, 2014). There are emerging local on-demand platforms such as Royal Media's 'ViuSasa' where people can upload films that are distributed directly to consumers. In visual arts, artists such as Michael Soi bypass the traditional galleries and art collector processes by taking his art straight to his network of celebrities and collectors via Instagram.

Secondly, access to technology has improved access to skills. Creatives turn to online platforms such as YouTube to learn skills. Young DJs learn how to mix online, producers can download open-source software, which allows them to learn how to produce music online. The available technology is both filling conventional schooling gaps and replacing conventional schools as a platform for knowledge and skills acquisition in the creative sector. It must be noted, however, that access to technology does not address the issue of quality education.

Lastly, technology comes with its share of challenges in the sector, in particular related issues of piracy. It is estimated that Kenya artists are losing over USD 47 million every year (itweb Kenya, 2013). In addition, online demand services that collect revenue on behalf of artists take a significant percentage of the revenue, remitting only a fraction of the revenue, e.g. ViuSasa remits only 35% of the revenue it collects to artists denying proper income to the artist according to data from stakeholder roundtables.

Distribution and monetisation



The Film, Fashion and Design, Music, Arts and Crafts, Cultural Heritage and Festivals have been identified by funders such as the British Council, HEVA Fund and UNESCO as having the highest potential for commercialisation. There are other sectors that are up and coming including: digital content, gaming and esports (HEVA, 2018a). However, these are not discussed within this report. There is low market aggregation and limited information on market opportunities, low business acumen from creatives to monetise and sustain their creative work, and weak monetisation policies (expert interviews)

Collaboration, councils and guilds



There are various oversight and collaboration groups in Kenya that play different roles. These include the Kenya Film Commission that promotes Kenyan film locally and internationally, and the Creative Economy Working Group.

Self-organising grass-roots organisations for creatives have also sprouted across the country. Kadzandani Creative Youth Organisation, Dance Kitchen (dance) and Ufalme Africa Mombasa (film, theatre, and performance) in Mombasa are some examples.

There is little cross-value chain collaboration, and low membership of youth informal and informal groups

5.6 THE MOMBASA CREATIVE LANDSCAPE

Mombasa's cultural heritage provides a great foundation and opportunity to build a creative sector strategy. Mombasa is a city on Kenya's Indian Ocean coast. and is the country's oldest and second largest city (after the capital Nairobi) with a population of 1,208,333 people according to the 2019 census. Mombasa is a tourism-based city with a large container port, an international airport, and is an important regional tourism hub. It has a long history of culture and arts, and still maintains a thriving creative scene offering opportunities to many youths.



Inside Fort Jesus, (Image credit: The Star (Kenya))

Old history: In Mombasa's early 900-year-old history, it was a melting pot of cultures with the Portuguese arriving on her shores from the West and Arabs and Indians from the East. Over time the different cultures mixed to produce a rich hybrid and vibrant tapestry that has made Mombasa the celebrated attraction it is today.



Mombasa Spice market (Image credit: BBC.com)



Food, music and fashion: Mombasa is known for its coastal cuisine with Arab and Indian influences. It features dishes such as Pilau, Biriani, and Mnazi. Famous textiles include the kanga and lesa.

Movies: Mombasa has set the scene for several local and some international productions in the past. Leading shows in



Fadhi Williams famous for the Song "Malaika" (Image credit: Wasanii Media)

Cover photo of Tausi, a popular Kenya Sitcom (Image credit: Nairobiwire.com)

the 90s were almost entirely based on the Swahili culture and extensively employed the Swahili language and cast members. Shows such as Tausi, Kisulisuli and Tahamaki dominated the airwaves and attracted a large countrywide viewership. Currently, sitcoms such as Pete, which is produced in Mombasa, are enjoyed by fans across East Africa.



Tourists in Mombasa (Image credit: The Standard)

Music: Mombasa acted as a launchpad to some of the most popular musicians in Africa that went global. Musicians such as Fadhili Williams of the Malaika fame started his career in Mombasa. Today the coastal region continues to churn out mega musical artistes such as Otile Brown and Susumila who have amassed a wide listenership across East Africa. Bongo and taarab music genres have gained notoriety in Mombasa too.

Tourism: In 2019, Mombasa received 128,222 Visitors. Moi International Airport registered a substantial growth of 8.6% respectively compared with the overall growth of 1.2% across the country (Global Tourism Forum, 2019). The award winning sandy beaches, in addition to other sites such as the Marine Park, Fort Jesus, Mamba Village, and Haller Park.draw visitors to the city.

Current creative work in Mombasa: Mombasa county has over 440,000 people employed by MSMEs (KNBS, 2016). Assuming that 1-5% of these are in the creative sector then 4,400 to 22,000 people may be employed in the creative sector in Mombasa. There are 126,000 youth aged 15-34 in informal employment in Mombasa, and 189,000 in formal employment. Applying the same assumption on contribution of the creative sector to the economy and labour markets, there could be between 3,000 and 15,000 Mombasa youth employed in the sector (up to 6,000 in informal employment and up to 9,000 in formal employment).

5.7 DEMOGRAPHIC AND JOB ROLE BACKGROUNDS FROM YOUTH SURVEY

As part of the overall GOYN strategy, the team conducted a deep dive of the youth in Mombasa County. Mombasa County has a population of 562,000 youth aged 15-34 years. Out of this number approximately 247,000 (44%) are not in education or employment, while 126,000 (22%) are in the informal sector with 189,000 (34%) in formal employment (KNBS, 2019). This means that 66% of youth in Mombasa are estimated to be opportunity youth. The Mombasa youth surveyed were split evenly between ages 18-24 and 25-34. Sixty six percent (66%) of respondents identified as male, and 60% lived in sub counties of three of Mombasa’s six sub-counties : Mvita, Kisauni and Likoni.

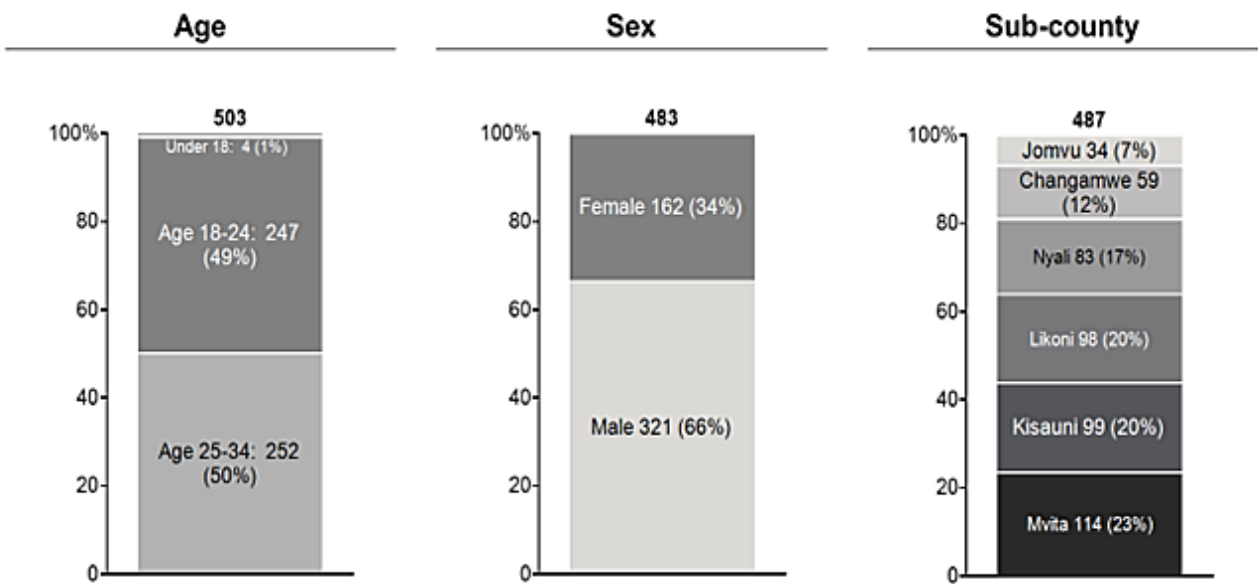


Figure 15 Demographics of Mombasa youth surveyed basedon age, gender, education, and employment

Leveraging interviews conducted prior to COVID-19, the team developed a profile of the overall creative community in Mombasa focusing on type of sector, education, employment, and income. Twenty two percent (22%) of youth

surveyed are in the film and theatre, twenty percent (20%) music and performance, and eighteen percent (18%) in arts and crafts sectors. Seventy seven percent (77%) of youth surveyed are self-employed. Eighty percent (80%) have a secondary education and above, including 30% with technical and vocational training, and 24% with a bachelor's degree. Additionally, 47% are in full-time work, with 42% and 12% in part-time and casual work, respectively. Sixty one percent (61%) of youth surveyed earned <KES 15,000 (<USD 150) per month, which is just at or below minimum wage, with 26% earning between KES 15,000 and KES 30,000 (USD 150-300) per month. Only 13% of Mombasa creative youths earned >KES 30,000 per month (>USD 300).

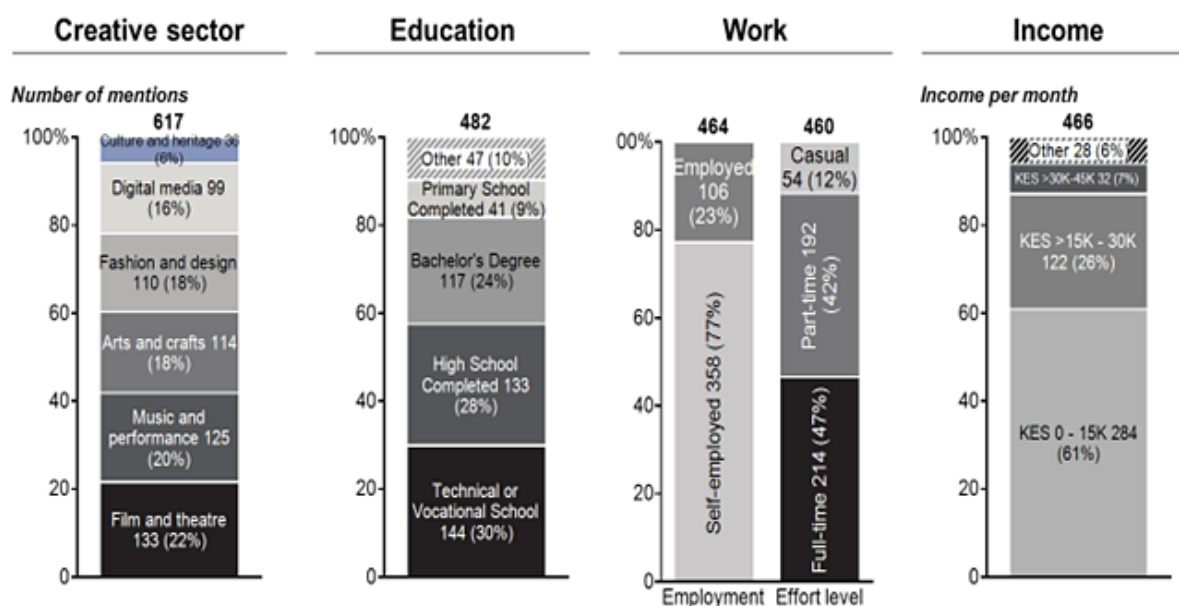


Figure 16 Overview of youth in the creative sector by type, education, employment, and income (GDI/ GAN survey, 2020)



The main creative products cited include music, art, photos, clothes, and dance, and the main occupations of youth surveyed were designers, artistes, designers, and business owners.

Figure 17 Word cloud of main creative occupations

6. CURRENT YOUTH SKILLING AND PARTICIPATION IN THE MOMBASA CREATIVE SECTOR

This section highlights insights in youth participation in the Mombasa creative sector, youth skills and evolution, and technological trends. These are informed by primary data from stakeholder interviews, roundtables, and the youth survey. A summary of key messages and insights is given below, and detailed discussions in subsequent sections

Youth participation

- Youth participation in the Mombasa creative sector is influenced by passion, income, education level and parental support. 66% of youth are motivated to join the sector by passion and income.

Current youth skills and gaps

- There is a critical gap in the creative education system. Majority (70%) of creative youths are self-taught (50%) or apprentices (20%) indicating that TVETs, universities and other training and education institutes are lagging in producing creatives.
- However, this indicates that youth passion and commitment to their craft drives them to teach themselves. The fact that 21% of youth mention they would acquire new skills through online channels indicates self-drive to augment their self-taught skills.
- Creative youth are lacking many management skills such as art management, business management (including finance and accounting), and marketing skills.

6.1 FACTORS INFLUENCING YOUTH PARTICIPATION

It was found that youth participation in Mombasa's creative sector is influenced by income, education level, passion, and parental/guardian support. A detailed discussion on each of these four influencing factors is below:

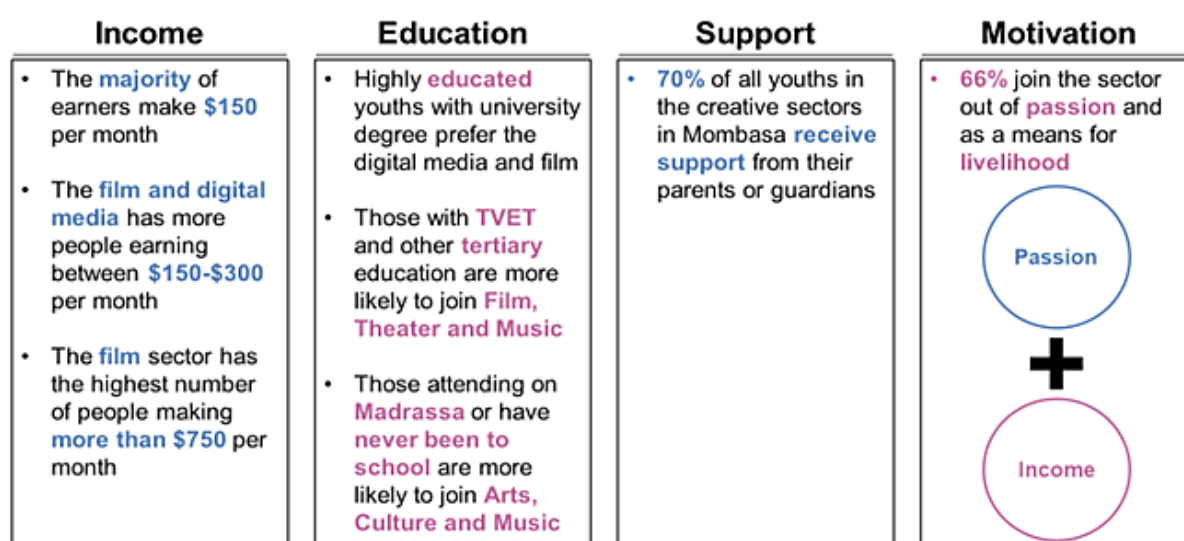


Figure 18 Factors influencing youth participation in the creative sector in Mombasa (GDI/ GAN survey, 2020)

Income: Youth survey results showed that those in the film and digital media categories were the higher earners, followed by the culture category. It appears, therefore, that there is a link between certain parts of the creative industry and people's average income. The survey revealed a gendered income variation with males (57.8%) less likely than females (67.5%) to fall into the lowest income category.

Survey data also showed that for low-income earners working in the creative industry, (<KES 15, 000 monthly), passion is a key driver. However, for those in higher income brackets, there does not exist such a singular motivation suggesting that education and experience might be crucial to success.



Figure 19 Mombasa Youth at an event organized by Swahilipot Hub (Swahilipot)

Education: The survey showed that respondents with at least some university training were more likely to work in film and digital media than other industry categories. By comparison, the majority of those in the fashion industry (in the case of this survey: tailoring) are primary school dropouts while those who make it to university are almost as equally likely to finish their bachelor's degrees, as they are to drop out. Those who have no education or attended religious studies only are more likely to enter the crafts industry.

Support: Family support emerged as a critical influence on youth in the creative economy. 86% of youth living with parents indicated that they received some form of guidance or monetary support from their parents and guardians that enabled them to enter the creative industry. While both male and female respondents received family support, males were more likely than females to come into it although females were less likely to receive 'no support at all'. The study found a correlation between the parent's educational level and the level of support they offer. Overall, the higher the education of parents/guardians, the more support they offered their wards. Youth in the higher income brackets reported receiving more frequent capital support from their parents, with males more likely than females. The findings suggest that while passion, talent and skill are essential to success, so are gender and investment, in particular, seed funding which often raised by family.

Motivation: Most respondents said they joined the creative economy because they were passionate about it or for economic reasons. Those two reasons dominated entry into all categories of the industry. Those who were passionate about the industry spoke of possessing a talent or a set of skills although it was not clear whether they distinguished between the two and passion. It appears that having talent had little to do with the choice. It is possible, that respondents referred to passion and talent interchangeably and that the distinction was lost in translation between English and Swahili. Combined with economic motivation, the lack of distinction reflects the youth's pragmatic



Figure 20 Young DJ/Producer at an event in Mombasa (Swahilipot Hub)

approach towards the sector.

Further research would be required to investigate the perceived differences between passion and talent. While there does not exist consensus on whether the two qualities are sufficient to succeed in the creative industry, it is evident that acquired skills are vital to success. Indeed, an insight into people's understanding of passion, talent and skill could provide a basis for designing programmes that combine mentorship and coaching with other modes of teaching and skills delivery to ensure that youth have the required nurture and 'know-how' to enter the industry.

6.2 CURRENT YOUTH SKILLS AND GAPS

There is a **critical gap in the creative education system**. Majority (70%) of creative youths are self-taught (50%) or apprentices (20%), which may indicate that Technical and Vocational Education and Training (TVET) colleges, universities and other training and education institutions are lagging in producing creatives. This is supported by the fact that 68% of current creative youth express a desire to pursue further skills through these establishments. Despite this, the self-taught nature of creative youth also indicates passion and proactivity in acquiring required skills. Creative **youth are lacking many management skills** such as art management, business management (including finance and accounting), and marketing skills.

a) **Skills acquisition:** Fifty percent (50%) of the respondents said they were **self-taught** in their chosen area, followed by 20% who had access to a master craftsperson and just over 5% reporting to having learnt online (although, it is likely that they did this alone, qualifying them for the self-taught category).

Out of all those surveyed, 61% said they **self-funded** their skills acquisition while 24% said they were sponsored by their parents, with 50 youths being both self-funded and sponsored by parents. That most youth are self-taught (50%) and self-funded (61%) is likely a function of limited skills development channels and funding, and self-drive on the part of the individual. It may also **indicate informality** in the sector.

It must be noted, however, that while a high proportion of self-taught creatives indicates gaps in creative education systems, it also highlights passion and commitment to their craft. The fact that 21% of youth mention they would **acquire new skills through online channels** and 17% through apprenticeships, shows self-drive to augment their self-taught skills.

b) **Skills gaps:** Several stakeholders interviewed for this research indicated that youth **lack non-creative skills** in art management, business management, branding and marketing, and some technical skills.

Art management <i>"An artist needs a good team for management this is the critical factor to success"</i> Producer, Mombasa <i>"There is a gap in the management side of the visual arts. Key gaps are in project management, arts management and curation"</i> The general, The Art Project	Business management <i>"Creatives not trained in business acumen and financial literacy"</i> <i>"Creatives lack soft skills critical and strategic thinking"</i> Stakeholder roundtable	Branding and marketing <i>"The biggest needs are around the after-production services such as marketing and branding"</i> Producer, Mombasa	Technical skills <i>"There are no specialized curriculums for acting, handling equipment, cameraman for films vs music video, etc."</i> Stakeholder roundtable
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Figure 21 Creative youth skills gaps according to expert interviews and roundtables

c) **Mentorship:** Survey results also showed a correlation between higher incomes and having a mentor. Youth that earned about USD 800 a month had a mentor. Youth in the theatre, and arts and crafts categories were more likely to have mentors than youth in other creative categories. This could be driven by the skills acquisition model, whereby youth learn from established performers and master craftspeople.

The study also found that the **highest earners were more likely to have mentors**, although in general there is little correlation between what people earn and having a mentor. This finding could be indicative of how people interpret mentorship; it is possible that some equate mentors with patrons. It is also possible that people can expand their networks and access mentorship



Figure 22 % Mentors by income level (GDI/GAN survey, 2020, N=435)

once they achieve some level of education or economic success, which suggests that mentorship is a reward rather than a support structure in this field. Over half of the respondents said they did not have access to any trade association. The reasons they gave were mostly because they were not aware of any, some had no desire to join while others lacked time.

7. SKILLS ANTICIPATION IN THE CREATIVE SECTOR IN MOMBASA

The skills anticipation analysis covers five areas as guided by the SenAi skills anticipation methodology which covers five areas: technological trends, analysis of emerging occupations, analysis of occupational impact, analysis of occupational trends and analysis of educational gaps. The following key questions are answered per section:

- **Technological trends:**
 - What technological trends have been observed in the creation and distribution of creative products in Mombasa?
 - How has youth skilling changed because of technology?
- **Emerging occupations:** What are the current creative job roles that exist, how have they evolved, and what new job roles have emerged?
- **Occupational impact:** What creative skills are dying, and which are critical for the future?
- **Occupational impact:** What creative skills are dying, and which are critical for the future?
- **Occupational trends:**
 - *As-is:* How many youth are currently employed in the creative sector in Mombasa today?
 - *Current job potential:* How many creative jobs can Mombasa opportunity youth take up today, if they had the right skills?
 - *Future job potential with investment:* How many creative job opportunities exist if economic growth and stakeholder investment are factored in?
 - *Jobs required at full potential:* How many creative jobs would be required to absorb all creative opportunity youth in Mombasa? What is the value of this job market?
- **Educational gaps:** What are the gaps in education systems in supplying required skills?

7.1 TECHNOLOGICAL TRENDS

Technology has disrupted the creation and distribution of all creative products. According to stakeholder roundtables, digital tool acquisition and distribution has reduced the costs of production and access to customers. This is because creative intermediaries and gatekeepers have been bypassed, creating opportunities for creatives to access millions of customers and make direct sales. Improved access to cheaper inputs such as mobile and smartphones (mobile penetration rate of 97.8% as of June 2018 according to the Communication Authority of Kenya) has also reduced entry barriers like production costs, allowing more youth to create their products. Additionally, access to the internet and social media (84% internet penetration and 8.2M active social media users in Kenya) has created new marketing and distribution channels for creative products (Jumia Kenya, 2019). It must be noted, however, that despite the promise of digital platforms, making money off of these platforms is still challenging. This is because the majority of the traffic and revenue on digital platforms (e.g. YouTube) comes from a small percentage of content creators.

Some examples of technology-based creation and distribution are:

- **Film and theatre:** Online channels increase on-demand content (e.g. Mombasa-based Black Tronci Films has almost 1 million YouTube views on its short films and videos)
- **Music:** Local artists can distribute their music on digital platforms (e.g. Mdundo and Skiza tunes)
- **Visual arts and crafts:** Visual artists are embracing social media and other online platforms to showcase their work (e.g. Instagram, Behance, Society6)
- **Fashion and design:** Virtual fashion shows transcend location (e.g. a virtual fashion show hosted by Afroconnect in Mombasa in 2020)
- **Digital media:** Photographers are leveraging websites and social media for their portfolios
- **Culture and heritage:** Heritage sites like Fort Jesus in Mombasa are developing virtual tours

Lastly, technology has increased access to skills development platforms for creatives through low or no cost online tutorials and courses. This is through free tutorials on YouTube, short courses on Skillshare and accredited courses on Coursera and Udemy.

7.2 EMERGING OCCUPATIONS

There are over 150 creative job roles that youth can take up in the various creative value chains (UNESCO, 2009). Some examples are given below. Many of these jobs are current job roles whose work content is evolving and are influenced by technology and innovation. For example, traditional art auctioneers need the skills to transition to online auctioneering, visual artists and crafts persons need to learn to design and model using software, and graphic designers increasingly need to learn to write their own computer code. Additionally, many existing job roles have increasing demand particularly in the digital media sub-sector. These include web design, graphic design, content creation/ blogging, and social media management (Brighter Monday, 2019).

Film and theatre (36+ roles)	Music and performance (37+ roles)	Visual arts and crafts (45+ roles)	Fashion and design (24+ roles)	Digital media (9+roles)	Culture and heritage (8+ roles)	Cross-cutting roles (12+ roles)
<ul style="list-style-type: none">• Casting agent• Stunts coordinator• Costume designer• Hair stylist• Makeup artist• Grip• Gaffer• Best boy• Stand-in• Driver• Caterer• Location manager• Archivist• Advertiser• Publicist• Trainer and supervisor	<ul style="list-style-type: none">• Advertising agent• Printer• Marketer• Costume designer• Sound providers• Sound engineers• Software• Band members• Logistics and transport• Power• Makeup artists• Event mgmt.• Graphic designers• Ticketing agent	<ul style="list-style-type: none">• Space providers• Logistics• Marketers• Printing• Sales• Studios• Curators• Auctioneers• Galleries• Graphic designers• Exhibitions• Ticketing• Promoter	<ul style="list-style-type: none">• Raw material providers• Designers• Tailors• Marketers• Sales• Studios• Models• Event managers• Promoters	<ul style="list-style-type: none">• Videography• Photography• Social media managers• Content creators• Makeup artists• Advertisers• Graphic designers• Digital artists	<ul style="list-style-type: none">• Guides• Interpreters• Curators• Collectors• Merchandising• Space managers Other cultural art forms in music, arts and crafts, and fashion	<ul style="list-style-type: none">• Operations manager• Administrator• Finance and accounting• Advertising• Sales• Distribut'n• Security• Facilities management

Indigenous art forms that make up Mombasa's rich heritage are under threat. Only 6% of youth in the creative sector are involved in culture and heritage. Art forms like carving, poetry (*ushairi*), and traditional woodwork are all dying out. Many of these skills and art forms are traditional, and passed on through apprenticeship and their disappearance is a threat to Mombasa's culture and heritage. As discussed earlier, Mombasa's rich history, culture and heritage is a key attraction for domestic and international tourism which is a leading contributor to the county's economy. Youth skills in these art forms should be encouraged and cultivated to encourage indigenous knowledge preservation. Additionally, they can be monetised to provide jobs particularly in the tourism industry, eventually improving the livelihoods of youth creatives.

Figure 23 Examples of dying art forms (GAN/GDI survey 2020, stakeholder interviews 2020)

"They need to skill up to improve in what they do or to progress in their various creative fields" (Dean, Film and Theatre Arts, Kenyatta University)

Future potential (with growth and investment):

With growth and additional investments in the creative sector, 2-3 times more jobs could be created. For example, demand for local sitcoms could increase, an increase in purchasing power could result in increased demand for visual art, corporates and local governments could invest in new festivals and exhibition spaces, and development partners could provide grants for creative assets. Under this scenario, there could be **up to ~10,200 creative job opportunities**. These would be ~3,000 jobs for youth in film and theatre, 2,400 in music and performance, ~960 in visual arts and crafts and ~3,800 in festivals.

Full potential: There are currently an estimated 373,000 opportunity youth in Mombasa. Assuming that 1%-5% would fall in the creative sector, then **3,700 to 18,500 creative job opportunities** need to be created in the sector to absorb all opportunity youth at full potential. Thus, there is a gap of about **8,300 jobs required** between the 'future potential' scenario and 'full potential' scenario to absorb all creative opportunity youth. Using the survey data to further extrapolate, this would mean up to 3,900 jobs in film and theatre, up to 3,700 in music and performance and ~ up to 3,300 in visual arts and crafts today.

Table 2 Scenario analysis of occupational trends and job opportunities

	As-is	Current potential	Future potential	Full potential
Description	Estimation of current employment in Mombasa creative sector	Current opportunities based on value chain demand drivers (~1-2-year horizon)	Increased investment by stakeholders to sector (~2-5-year horizon)	The absorption of ALL creative opportunity youth in formal/ semi-formal jobs (5+ year horizon)
Number of jobs in top sub-sectors	9,000	~3,900 potential jobs	~10,200 potential jobs	~3,700 to 18,500 jobs required
Film and theatre	~3,200	1,890	3,024	~780-3,900
Music and performance	~3,000	661	2,402	~740-3,700
Visual arts and crafts	~2,800	170	960	~660-3,300
Festivals	NA	1,192	3,848	N/A

It is assumed that the different scenarios will result in increasing job formalisation, job quality and consequently, increased youth income. For example, immediate skilling of youth to take up current job opportunities would result in fewer youth earning <KES 15,000 per month, which is currently the largest income bracket amongst creative youth. Additionally, the investment by stakeholders like government TVETs and corporates would increase skilling supply and demand for creative products respectively through formal channels. Lastly, the desired end-state where all opportunity youth are absorbed in the formal employment market would imply income upward mobility. The implied increased income would be as a result of higher-level skilling and improved quality of jobs through formalisation (e.g. benefits like pension, social security, and health insurance contributions). A summary of the estimated income levels and value of the job market per scenario is given in the table below.

Table 3 Summary of the estimated income levels and job market value per scenario

	Increasing level of job formalisation and job quality			
	As-is	Current potential	Future potential	Full potential
KES >75K	1%	1%	2%	3%
KES >60K-75K	1%	2%	3%	5%
KES >45K-60K	4%	5%	8%	10%
KES >30K-45K	7%	10%	15%	15%
KES >15K - 30K	26%	30%	30%	30%
KES 0 - 15K	61%	52%	42%	37%
Estimated annual value of job market (calculated using midpoint of income ranges)	KES 1.79 billion USD 17.9 million	KES 0.9 billion USD 9 million	KES 2.85 billion USD 28.5 million	KES 5.78 billion USD 57.8 million

7.5 EDUCATIONAL GAPS

As discussed earlier, there is a gap in the creative **education system**. Majority (70%) of creative youths are self-taught (50%) or apprentices (20%) indicating that TVETs, universities and other training and education institutes are lagging in producing creatives. Additionally, that 68% of youth would want to acquire future skills through learning institutions like TVETs (27%), private training institutes (21%) and universities (10%), indicates an opportunity for learning institutions. However, the current educational system capacity is inadequate to skill creatives as needed, as highlighted by insights by stakeholders below.

There are gaps in TVETs, private training institutes, and universities as creative youths, majority of whom are self-taught, would acquire their future skills through these channels

"There are very few entities that support the education of visual artists"

General, The Art Project

"The best place to train is TVETs. Also make them hubs for creatives"

Former creative director, HIVOS

Apprenticeship under a master craftsperson is also an effective way of developing skills through real-life experience

"Learning by apprenticeship and mentorship is much better than too much classroom theory"

Producer, Mombasa

"Our director of photography started out managing the facilities at the shoot sites and acquired skills on-the-job"

Phil IT Production

Figure 26 Quotes from stakeholder interviews on the educational gaps (2020)

At current trends from the survey, in order to skill creative Mombasa opportunity youth, TVETs and private training institutes would need to produce 400 to 2,000 creatives. Universities and colleges would need to produce 200 to 1,000 creatives, 2,000 to 10,000 would need to self-teach, and 750 to 3,700 would need apprenticeships.

- **TVET/ training institutes:** Over the next 10 years, Kenyan TVETs and training institutes can produce 4 to 5 graduating classes, each comprising 89,000 graduates [1] (KUCCPS, 2020). Assuming 1-5% of these are creative, and 2% [2] are Mombasa youth, then 534 (upper estimate) Mombasa creatives will graduate from TVETs and training institutes over the next 10 years, compared to the current opportunity youth demand of 400 to 2,000.
- **Universities/ colleges:** Over the next 10 years, Kenyan universities and colleges can produce 2 to 3 graduating classes, each comprising 122,000 graduates¹ (KUCCPS, 2020). Assuming 1-5% of these are creative, and 2%² are Mombasa youth, then 366 (upper estimate) Mombasa creatives will graduate from universities and colleges over the next 10 years, compared to the current opportunity youth demand of 200 to 1,000.
- **Apprenticeships:** Assuming the ratio of craft master to apprentice is 1:10, then 75 to 370 masters would be needed to absorb creative opportunity youth that would learn through apprenticeships (750 to 3,700 youth).

[1] Assuming 0% drop out (aggressive) and that all placed students will graduate; [2] 1.2 million people from Mombasa county out of 47.5 million nationally (KNBS 2019).

The numbers above highlight a critical mismatch between education system supply, and the demand for jobs by opportunity youth. If more self-taught creatives and apprentices seek formal education for their creative skills development, this gap is even more pronounced. Additionally, there is also a skills mismatch as discussed earlier.

In order to achieve the job scenarios laid out in the 'Occupational trends' section, the skills required per creative value chain are given in the table below.

Table 4 Summary of the future skills required by youth to take up creative jobs in different value chains

Film and theatre	<ul style="list-style-type: none"> • Business skills: management, accounting, entrepreneurship (e.g. proposal writing, pitching, networking), digital marketing and advertising • Technical skills: videography and cinematography, video editing, animation, music production, directing • Digital skills: web design, IT, consulting for digital content
Music and performance	<ul style="list-style-type: none"> • Business skills: management, accounting, negotiation, digital marketing and advertising, music promotion, branding, human resource management • Technical skills: vocal training, playing instruments, choreography, videography, editing, music and video production, music distribution • Digital skills: software deejaying, web design
Visual arts and crafts	<ul style="list-style-type: none"> • Business skills: management, accounting, entrepreneurship (e.g. leadership, networking, critical thinking), marketing and advertising • Technical skills: colour mixing and matching, drawing and design, creativity, painting, photography, carving and sculpting • Digital skills: computerised drawing and design, 3-D and 4-D design computer programming, data security
Fashion and design	<ul style="list-style-type: none"> • Business skills: management, pricing, accounting, digital marketing, entrepreneurship (e.g. leadership, networking), project management • Technical skills: fashion design, hair, and make-up, blogging and content creation, photography, editing (videos and photos), colour matching, tailoring, creativity • Digital skills: computerised fashion design and drawing • Business skills: management and customer acquisition, accounting, digital marketing, entrepreneurship (e.g. networking, negotiation, fund-raising, proposal writing), data analysis • Technical skills: advanced graphic design, video editing, photography and videography, music production, realism animation
Digital media	<ul style="list-style-type: none"> • Digital skills: computer programming, hardware maintenance and development, data and cybersecurity, cloud computing, web design, 3-D design and modelling, Search Engine Optimisation (SEO) • Business skills: management, accounting, marketing, networking
Culture and heritage	<ul style="list-style-type: none"> • Technical skills: wood carving, creativity, drawing and design • Digital skills: computer literacy



Examining a creative's journey highlights the importance of some of the future skills required, particularly to support the monetisation of creative artforms:

- In the film industry for example, screenwriter may have to pitch a script to a production house or network, in order to monetise their work. This would require proposal writing skills in addition to their technical writing skills. According to stakeholders and experts interviewed, these pitching and proposal skills are not taught in many Kenyan film and theatre certificate, diploma, and degree programs, despite being critical.
- A budding musician on the other hand would require robust negotiation skills when signing record label deals. Promotion and digital marketing skills would be required to navigate distribution and monetisation through digital platforms, particularly on a national and international level, as discussed under 'technological trends'.
- A visual artist or craftsperson would benefit from project management skills on both an artwork-level and for greater projects like exhibitions, residencies, and festivals. Managing the creation of a visual art product or craft requires not just the technical skills like colour matching or sculpting, but also an understanding of inputs required, interdependencies, managing project stakeholders and others
- For a fashion designer optimal pricing is key. Given many fashion products are consumer products, pricing at the right point is important for monetisation. This requires an understanding of basic accounting principles in order to price at a level that consumers are willing and able to pay, allowing fashion creators to sell the volumes required to cover costs including material costs and salaries
- Digital creators like photographers, graphic designers, and web designers, would need customer acquisition techniques as their work is often gig-based. Customer acquisition could be through digital gig platforms, social media marketing or other channels.

8 CHALLENGES AND OPPORTUNITIES

8.1 SYSTEMIC CHALLENGES

It is clear that there are similar thematic challenges from all of the discussions and surveys, across the sectors. These include gaps in skills, infrastructure, funding, policy, technology, monetisation and distribution, as well as collaboration. Results from the Mombasa youth survey and stakeholder engagement identified challenges affecting the creatives sector in Mombasa. These were primarily cross-cutting gaps in the ecosystem.

Skilling and research



- A critical gap in skills development for youth is the reality that there are **few mainstream institutions** for the skilling of creatives. This is reflected by the fact that most **creatives are self-taught**. Available **skilling is also considered expensive** by many, and those who take up training do so for **specialised skills** (expert interview). Most self-taught artists practice as freelancers resulting in **unsteady income**, while educated artists are mostly instructors and educators.
- The perception that creative work is a hobby with **no clear career path**. Moreover, there is a **deficit of art trainers** and minimum apprenticeship models due to stringent requirements by the government for them to have at least a master's degree.
- **Minimal mentorship** also means that few youths can draw on the experience and expertise of more seasoned creatives and other professionals, which may have a bearing on their likelihood of success (survey).

Market development and data



- There is **minimal research** on the potential of the industry. There is little to **no data** showing the ROI for creative skilling, making the case for creative skilling, upskilling, and reskilling a hard sell for investors and creators alike.
- There is **little to no market aggregation** as it is a highly fragmented sector (expert interviews). There are also **few sources of information** on opportunities for youth creatives in Mombasa and Kenya at large.
- Unlike countries such as Nigeria and Canada, Kenya has not been a big investor in developing the creative market, with **limited understanding of the ROI**. The Kenya Film Classification Board has historically **censored local films** such as Rafiki, rather than market and promote them (Article 19, 2018). Additionally, the Tourism Board focuses primarily on promoting wildlife and beaches over the arts which have untapped potential.

Space, infrastructure, and assets



- There are **few spaces and hubs** to support development of creative goods and services, for instance Mombasa has only one theatre.
- Additionally, **assets** for creative work are often **expensive** for youth (most earn <USD 150 a month) due to import duties and other costs of distribution. This includes equipment for music production, cameras and lighting for photography and videography, software and hardware for graphic design, and sophisticated sewing machines for fashion designers and tailors.

Funding and investment



- There is **minimal financial investment** in creative value chains. Banks perceive the creative sector as high risk and thus limit access to credit and asset financing for creative work. In Mombasa, there are **few funding channels** to support creatives (interviews and roundtables).
- From the perspective of government priority, the **creative sector often takes lower priority**. For example, **government budgetary allocation** to the Sports, Arts and Social Development Fund was only KES 5.3 billion (USD 53 million) in the financial year 2019/2020, the equivalent of less than 0.2% of public expenditure that year (National Treasury, 2019). In its 2019 budget, Nigeria allocated over NGN. 53 trillion (~ 1% planned expenditure) to the Ministry of Information and Culture, majority of which was allocated to projects in film, theatre and fine arts development (Budget Office of the Federal Republic of Nigeria, 2019). In 2010, President Goodluck Jonathan of Nigeria approved a USD 200 million Creative and Entertainment Industry Intervention fund, to stimulate the growth of Nollywood and other creative industries (The Elephant, 2019).
- There are **limited art/creative funds** and those that do exist often have high financing costs (high loan rates or equity stakes), limited flexible financing

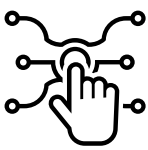
Government support and Policy

- There are **few creative regulatory bodies**, and those that exist **lag** in designing and implementing enabling policies for creatives. For instance, the policy that stipulates that radio play 40% local content in Kenya has potential to increase the demand for



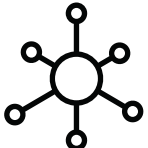
- local content but enforcement has been wanting. There has been an increase in the number of locally produced films and music to meet the policy requirement, creating new opportunities for artists and local producers leading to increased income opportunities. Implementation, however, remains a challenge due to **weak enforcement**. The stakeholder roundtable discussions highlighted that most local stations do not abide by the rules and even those that do, hardly pay royalties to artists. In addition, piracy exacerbates the challenge.
- There are **weak laws** protecting artists from piracy and other forms of exploitation particularly as it pertains to Intellectual Property (IP)[3] . Where policy exists, there is often a gap in implementation and enforcement, particularly for IP enforcement on the internet.
- There are also **poor royalty models** with financial rewards accruing to large corporates or intermediaries. Some creative policies are also punitive. **High levies and fees** for creative work pose a huge barrier. For instance, it may cost up to USD 1,000 a day for a license to shoot a video in some national parks such as the Maasai Mara and Nairobi National park. There is antagonism between artists and statute bodies making it difficult to collaborate.

Technology



- Digital disruption has affected traditional local media such as local TV shows due to the proliferation of video on-demand streaming platforms such as Netflix and ShowMax. Beyond music platforms like Mdundo and Skiza, **little local content is available on local and international streaming platforms** and television networks.
- Considering most creative youth make less than KES 15,000 (USD 150) a month, software licenses are **unaffordable** for many youths especially in sub-sectors like graphic design, film, and photography where software is required.
- There is also **no platform for information** on the creative sector such as training and job opportunities and funding (expert interviews).
- Finally, technology platforms such as peer-to-peer networks threaten the creative industry due to pervasive **piracy**.

Distribution, value chains and monetisation



- Many **value chain links are not operating at their full potential** as actors act in a siloed fashion. Links between creatives and key stakeholders such as hotels and other private sector actors functioning on an ad hoc and limited basis.
- Limited support for local, regional, and global market distribution for creative content, both physical and digital.
- The fundamental challenges in the distribution and monetisation of creative products are **low demand** from consumers, businesses, and government entities. For example, local and national governments consume minimal creative goods as it is a relatively lower priority sector. Additionally, artists often have **limited business acumen** to run their creative practices as viable businesses. Creatives often focus on what they know and want, rather than responding to market needs. The sector also **lacks end-to-end creative managers**, who can support artists to build profitable creative businesses.
- **Weak IP policies** and enforcement also mean that creatives experience challenges in monetising their creative products. Even where clear frameworks and regulators exist, such as the Music Copyright Society of Kenya (MCSK) responsible for paying royalties to musicians, non-compliance from broadcasters and the misappropriation of royalties (Nation, 2016).

Collaboration, councils, and guilds



- There is **little multidisciplinary collaboration/councils** across creative sector stakeholders including private sector and government players (expert interviews). Additionally, **few (<50%) youth are members** of creative guilds or associations (survey).

8.2 JOB CLUSTERS ACROSS CREATIVE VALUE CHAINS

Many of the job opportunities available to creative youths have been discussed under the “Skills Anticipation” section. Opportunity youth in Mombasa can benefit from these jobs across different job roles and income levels. As expected, the job market is currently skewed towards lower income levels. Of youth surveyed, for example, 61% earned <KES 15,000 (< USD 150) per month, which is just at or below minimum wage according to No. 12 of 2007 in the Labour Institution Act (Kenya Subsidiary Legislation, 2018). There is thus an imperative to develop youth creative skills to allow them to take up higher paying jobs. Additionally, there is a need to create quality job opportunities for creative youth, including decent pay, social security, and dignity.

All the opportunity job roles can be organised into three clusters: Gig work, Waged employment, and Micro businesses. These three categories can be either formal (licensed/registered) or informal (unlicensed/unregistered). Gig jobs can be full time or part-time and are often temporary. Waged employment is salaried or paid contracts. Lastly, microbusinesses and entrepreneurship are critical job pathways as these businesses are the largest job generators in the country.



Figure 27 Young person in the Sauti ya Pwani studio (Swahilipot)

Youth can be supported in pursuing a career in one of the three clusters. To exploit these opportunities, gig workers would require technical skilling, up-skilling and cross-skilling, and access to gig platforms. For MSEs, entrepreneurship training, micro-funding, access to markets and mentorship would be critical. For waged workers, job-matching and on-the-job up-skilling would be a success factor. There are currently gaps in the creative sector across each of the three job clusters. Some of these challenges have been discussed in section 6.1, but a summary is given below.

Table 5 Context and opportunities for gig work, waged employment, and micro-businesses

Gig work	Waged employment	Micro-businesses
Existing context		
<ul style="list-style-type: none"> Few platforms for young creatives to access and execute gig jobs. They mostly rely referrals No distinction between short-term contracts and on-demand gig work 	<ul style="list-style-type: none"> Few specific platforms that link creatives to available job opportunities Gap between demand and supply of skills 	<ul style="list-style-type: none"> Most of the businesses are informal Minimal access to credit since they are considered high-risk Few skilling opportunities
Opportunities		
<ul style="list-style-type: none"> A platform that connects artists to gig opportunities such as Kuhustle that is used for tech Jobs or Lynk for 'jua kali' opportunities 	<ul style="list-style-type: none"> Co-creation of a demand driven curriculum A job platform that specifically focused on creative job matching 	<ul style="list-style-type: none"> An innovative Micro-fund for creative sector Micro-incubation program to scale Micro-businesses

8.3 VALUE CHAIN-SPECIFIC JOB OPPORTUNITIES

Various creative value chains offer different types of jobs. Music, film, and visual arts have the greatest opportunities. This is aligned with the fact that most Mombasa youth are in these three sub-sectors. Detailed insights on the job opportunities in five priority sectors are discussed in this section. The summary table below highlights a few of these job opportunities. (More detail in Appendix)

Table 6 Summary of value chain-specific job roles

Value chain	No. of job roles	Waged (on contract/ salary)	Gigs (temporary/ event-based)	MSEs	Channels/ demand drivers
Film and theatre	36+	Script writer, finance officer	Actors, make-up artist	Cleaning, costume making	Local sitcoms on over 66 TV channels
Music and performance	37+	Producer, technician Curator, exhibition coordinator	DJ, master of ceremony	Catering, transport	Music studios, radio stations
Visual arts, crafts, and design	45+	Designer, seamstress, administrator	Photographer, event planner	Sign writing and mounting	Art markets, art auctions, direct/ online sales
Fashion	24+	Designer, seamstress, administrator	Stylist, graphic designers	Fabric supplier	B2C (e.g. boutiques), B2B (e.g. materials supply)

8.3.1 Film and theatre

The film and theatre industry can produce between 1,800 and 3,000 jobs according to the skills anticipation demand-driven analysis. The demand drivers for these jobs would primarily be locally licensed TV stations with a demand for local sitcoms due to the 40% local content stipulation. Film and theatre jobs can be found across over 36 job roles. According to stakeholder interview and roundtable insights, majority of these are currently lower to middle income roles such as requiring at least a high-school education. Some examples are prop and set assistants.

Potential distribution and monetisation models that youth can exploit are on-demand streaming platforms like ShowMax, Viusasa, and Iroko TV. Amateur and professional filmmakers can get paid through endorsements and product promotions for corporate brands online. Finally, traditional direct sales of DVDs is a viable sales channel, albeit susceptible to piracy.

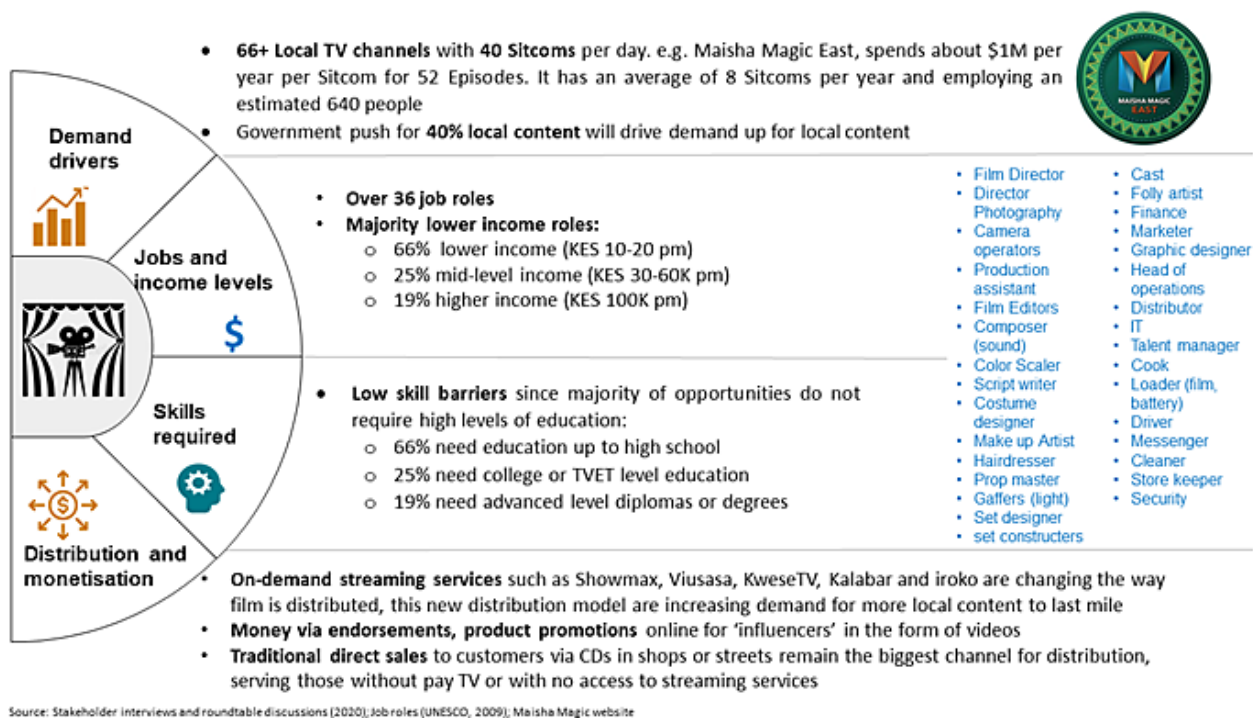


Figure 28 Film and theatre: demand drivers, job roles, income and skills levels, and distribution and monetisation models

8.3.2 Music and Performance

The music and performance sub-sector can produce between 660 and 2,400 jobs across 37 job roles according to the demand-driven skills anticipation analysis. According to stakeholder interviews and roundtable insights, majority of these jobs are currently lower income roles requiring at least a high-school education. Some examples are promotional activations, ticketing, sales, and distribution.

The demand drivers for music and performance jobs would be licensed radio stations with a mandate to play at least 40% local music. Additionally, direct end-user consumption of local music on platforms like Skiza increases the demand for local music. Live performance jobs are also driven by hospitality, Food and Beverage (F&B) players such as hotels, bars and restaurants that often put on live shows. Additionally, weddings and corporate events provide opportunities for revenue generation by artists. Potential distribution and monetisation models that youth can leverage include streaming platforms like Mdundo and Skiza locally, as well as Spotify and Apple Music internationally. If the policy environment is strengthened, artists could also make money from radio royalties. Traditional direct sales of CDs is another viable sales channel, particularly in rural areas.

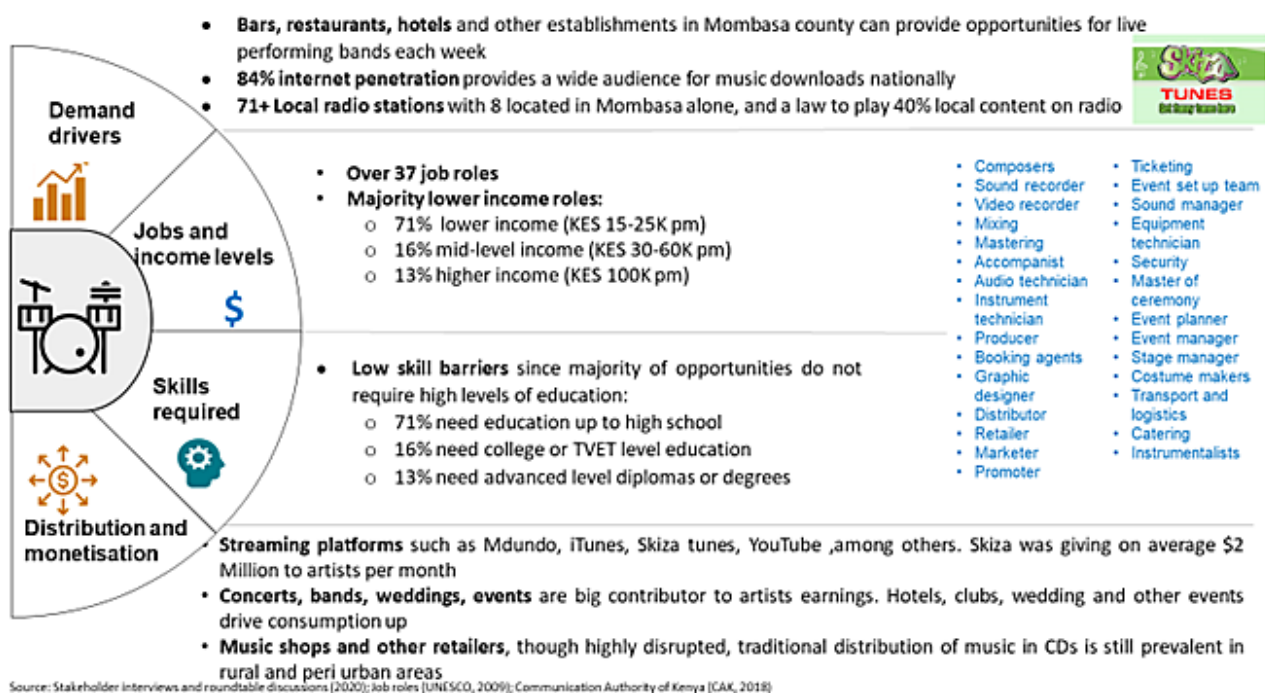


Figure 29 Music and performance: demand drivers, job roles, income and skills levels, and distribution and monetisation models

8.3.3 Visual arts, crafts, and design

The visual arts, crafts and design sub-sector can produce between 170 and 960 jobs over 45 job roles according to the demand-driven skills anticipation analysis. According to stakeholder interviews and roundtable insights, majority of these jobs are currently low to medium income roles requiring at least a high school education or apprenticeship and in some cases tertiary training or certification. Some examples are art agents, curators, sculptors, painters, and graffiti artists.

The demand drivers for visual arts, crafts and design jobs would be art exhibitions at galleries, art auctions, retail and commercial customers.

Potential distribution and monetisation models that youth can leverage are online auctions, art markets and shows, commissioned gig work and online platforms suited to visual art like Behance and Instagram.

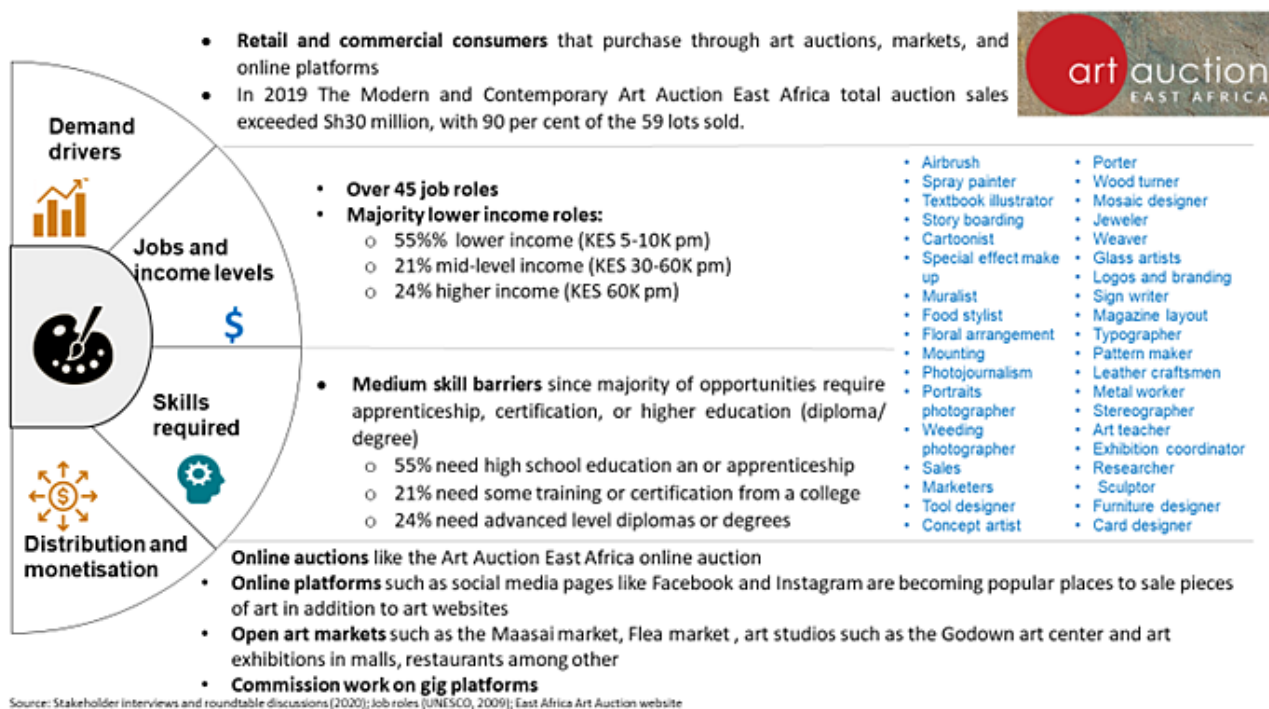


Figure 30 Visual arts and crafts: demand drivers, job roles, income and skills levels, and distribution and monetisation models

8.3.4 Fashion and design

The fashion and design has over 24 job roles that youth can take up. The demand drivers for these jobs are retail consumers, other businesses, and other creative sectors such as film and theatre, and music that require fashion services. Majority of these jobs are currently medium income roles requiring some training or certification from a college or tertiary institution. at least a high-school education or apprenticeship, and in some cases tertiary training or certification.

Potential distribution and monetisation models that youth can leverage are direct sales, and contracts for TV shows, festivals, and other media channels.

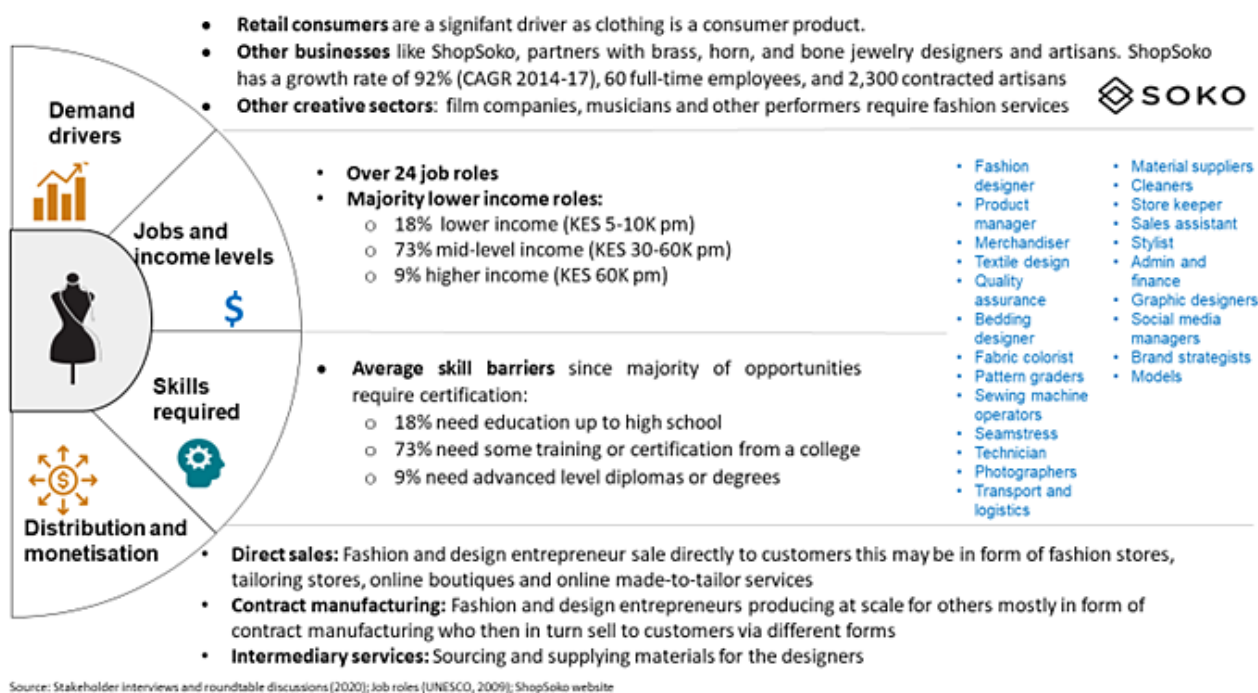
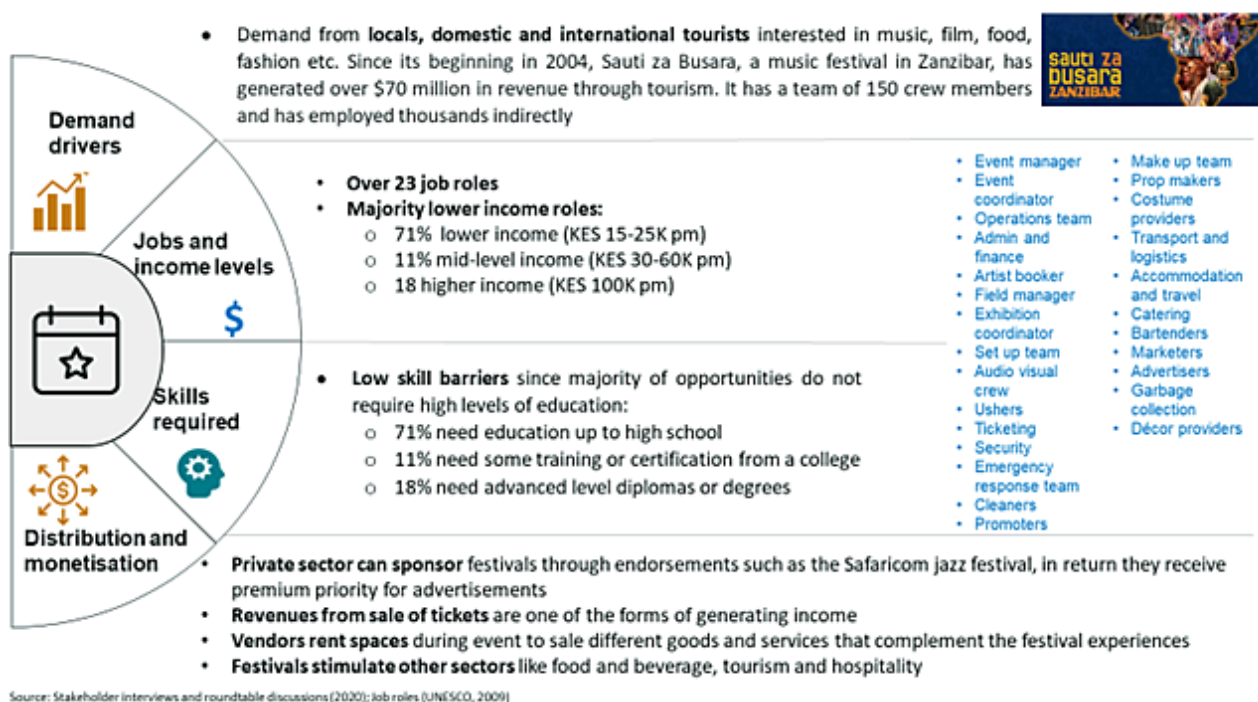


Figure 31 Fashion and design: demand drivers, job roles, income and skills levels, and distribution and monetisation models

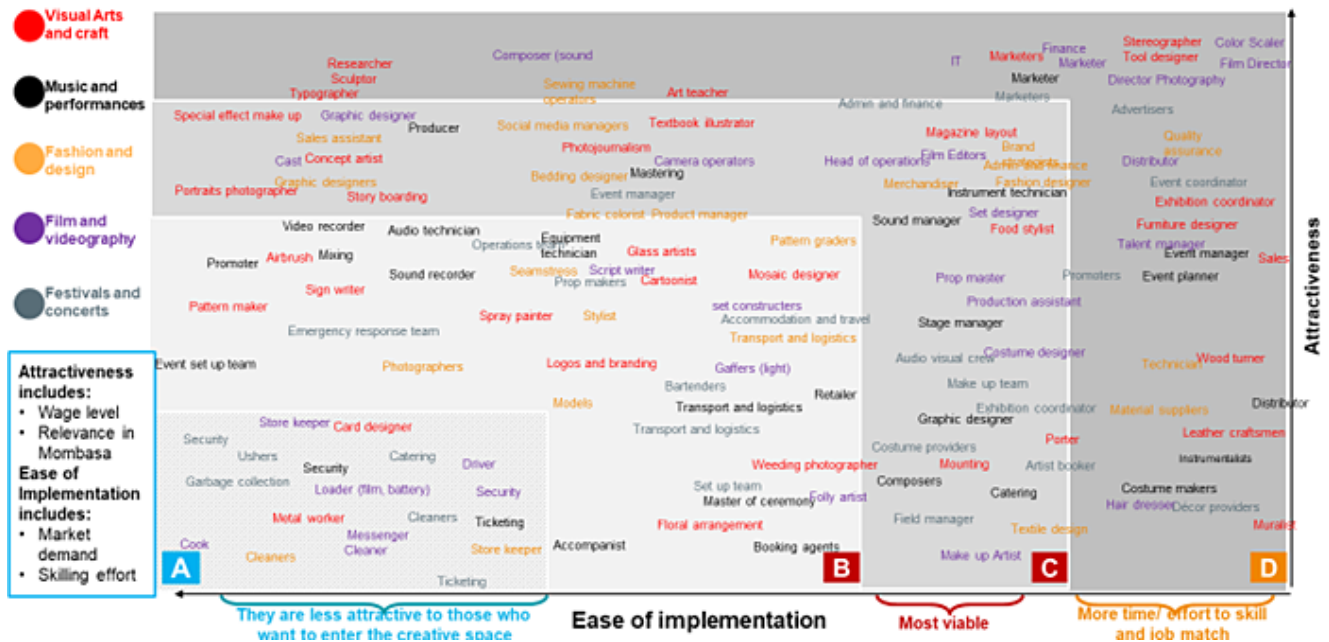
8.3.5 Festivals and events

Festivals and events cut across various creative value chains. This makes them a key source of potential job opportunities. According to the skills anticipation demand-driven analysis, there could be between 1,200 and 3,800 creative job opportunities from festivals. These jobs are across over 23 job roles. The demand drivers for these jobs are domestic and international tourists, and local festival goers. Many of the festival jobs are lower-income jobs such as servers, ushers, ticketing staff and security. Potential monetisation models are revenues from ticket sales, vendor fees and corporate sponsorships.



8.3.6 Key job considerations

Mapping job roles in various creative sectors according to their attractiveness and ease of implementation highlights the most viable opportunities. In Mombasa, factors contributing to attractiveness include wage level and relevance. Ease of implementation is a function of market demand and skilling effort.



There are three segments of jobs that emerge in the mapping of 'ease of implementation' and 'attractiveness':

- **Least attractive:** These are low-paying jobs with lesser relevance, despite being easy to enter. They are often times auxiliary to core creative activities and casual in nature. Some examples are cleaning, security, driving, store-keeping and ticketing.
- **Most viable:** These have a moderate to high ease of implementation and attractiveness. Job roles with low attractiveness and high ease of implementation may not be attractive to creatives as they are motivated by passion and income.
- **High effort:** Roles that are highly attractive but have a low ease of implementation require time and high levels of effort to fulfil. These are likely niche and specialist roles like film directors, furniture designers, costume makers and distributors (film or music).

Various stakeholders can develop supply-side and demand-side systems in the 'most viable' segment across various creative value chains. Some examples across creative supply chains are:

- **Film and theatre:** roles that are required on every film and theatre production and do not require advanced skills or experience but offer medium and above wage levels. Some examples are gaffers, costume and set designers, prop designers, make up artists, and audio/ visual technicians
- **Music and performance:** roles demanded by every music and performance production and do not require advanced skills or experience but offer medium and above wage levels. Stage managers, sound and instrument technicians are some examples.
- **Visual arts and crafts:** some most viable roles include illustrators for print and digital publications, fine artists, curators and exhibitionists.
- **Fashion design:** roles required for the creation of most fashion products and require a moderate-level of skills and experience. Designers, fabric colourists, seamstresses are some examples.
- **Digital design:** roles like web designers, portrait and event photographers, and graphic design are most viable as they are in demand from retail and corporate consumers, and require moderate-level skill and experience.

9 RECOMMENDATIONS



The project team is inspired by the youth of Mombasa who continue to exhibit resilience and artistic vision despite the effects of COVID-19 and the structural challenges that they face every day. We would like to put forward several recommendations below for key stakeholders to consider towards achieving sustainable economic growth, a flourishing cultural landscape, and a place of self-expression for the youth of Mombasa. For each of these recommendations, there are investments and partnerships that will require unlocking, but as outlined below, these directions could result in significant return on investment for economies, stakeholders and all citizens that would benefit from the innovation and creative output of the world's youth.

Based on the research, there are four pathways for delivering on the potential of the creative sector in Mombasa and each of the stakeholders would have a role to play in their development depending on the business cluster type from film to music.



GOYN Youth Advisory Group Vision: "A Mombasa with increased access to youth opportunities, employability and freedom of expression"

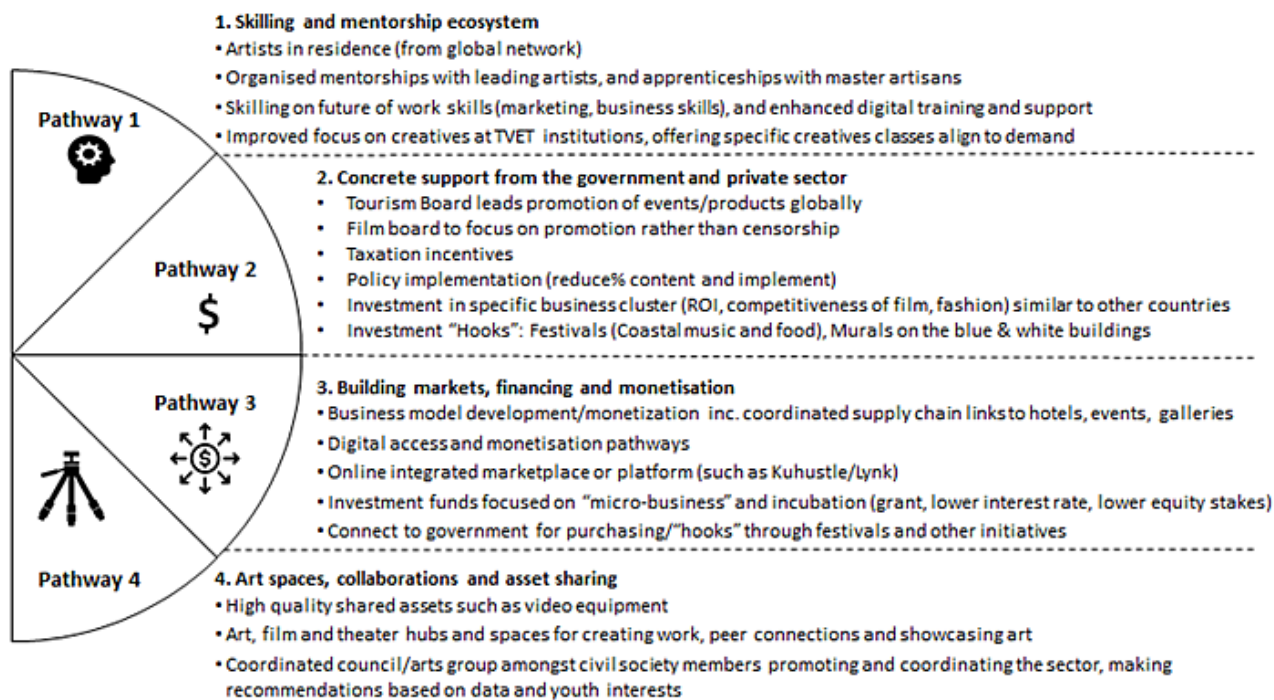


Figure 33 Overview of recommendations and the four pathways to creative youth employment

9.1 PATHWAY 1: SKILLING AND MENTORSHIP ECOSYSTEM

9.1.1 Mentorships and apprenticeships with leading artists, including artists in residence programs (global and local)

Design and implement a work-based model for apprenticeship: Of the youth surveyed, only 23% indicated that they were directly employed in the creative sector. The occupational demand mapping in the 'Skills Anticipation' section shows that there are more opportunities that can absorb higher numbers. The lack of appropriate skills and experience has been cited as a key barrier to job placement in the sector. A work-based learning approach based on the principles of quality apprenticeship could accelerate job readiness. Developing a career program with different options for youth entering the sector might provide a clear picture for career development. Working closely with small and medium businesses to offer apprenticeship opportunities could transfer knowledge and skills needed to grow the sector.

Fund master artisans as small businesses: There are emerging business models to fund master tradesmen to foster and grow small teams of tradespeople. A similar model can be developed for the artist world, from fashion to film and music.

Small stipends could be provided as part of creative group development. Mentorships and artists in residence programs: These would allow local and even global artists to bring their talents and experience to support and work with young local artists. Given the importance of mentorship to increasing incomes and success, any program supported for creatives in Mombasa should include mentor network development as the core of the programme.

9.1.1 Mentorships and apprenticeships with leading artists, including artists in residence programs (global and local)



Figure 34 Spoken word artist, Ohmslow Montana, poses for a photograph with other youth

Develop entrepreneurship skills: Of the youth surveyed, 73% said they were self-employed, mostly in an informal setup. Challenges identified around self-employment are sales and marketing, accounting, and bookkeeping, as well as customer relationship management. Equipping entrepreneurs with these skills would accelerate the growth of their

enterprises helping them move from the informal into the formal sphere. To further accelerate this, the government must reform policy and create incentives such as tax breaks and waivers that make it easier for informal entrepreneurs to register as formal microbusinesses. Additionally, most entrepreneurs cannot take long time off to attend formal learning classes as their businesses heavily depend on their presence. Skilling partners like private institutions and NGOs can play a significant role in offering flexible micro-learning modules that do not require long periods away from work.

9.1.3 Improved focus on creatives at TVET institutions aligning skilling to demand

- **Increase demand-driven skilling:** Development of demand-driven curricula by various institutes to be delivered both online and offline must be made accessible to youths. Further, there is an opportunity for creating a collaborative consisting of the private sector, entrepreneurs and trainers in the sector to develop and exchange data that continuously inform where and what jobs are demanded and what skills are and will be required to fill the available opportunity.
- **Change negative perception of the creative sector:** Negative perception of the creative sector makes it hard for youths to perceive it as a viable sector. This is driven by stereotyping the sector as an option for only “not serious” and more of a hobby option with no clear growth trajectory. The collaborative can spearhead the demystification of the sector by sharing data and evidence on the opportunities and potential of the sector. Additionally, it can document and share success stories to inspire those interested to join the sector on different platforms.
- **Set up a local art academy:** To institutionalise creative endeavours more fully, with sufficient private public partnership, it would be highly impactful to establish a Mombasa Art academy focused on a diversified set of creator work. This would act as a creative TVET college and connect demand, support students with monetisation tools and access to markets and capital.

9.2 PATHWAY 2: CONCRETE SUPPORT FROM THE GOVERNMENT AND PRIVATE SECTOR

As demonstrated in the aforementioned case studies of Nigeria, India and Canada intentional top down investment and policy support in certain sectors such as film, fashion, music and cultural events have a significant effect on building robust creative business clusters that in turn create thousands of jobs while also preserving and promoting local culture.



9.2.1 Collaboration of the Tourism and Film Boards on promotion of local events and products nationally and globally

- **Promote local content:** In other countries such as Canada, Nigeria and Singapore, the tourism boards and film and arts boards play an active role in supporting local content nationally and internationally. Kenyan Tourism and Film Boards should work together to support the branding, marketing, and promotion of local content national and globally. By linking artists to markets, the artist's revenues are bound to grow encouraging business growth and development.

- **Build a strong Mombasa brand:** The importance of building a strong and consistent brand in achieving organisational goals cannot be emphasised enough. The identification of products and services that encapsulate Mombasa's cultural heritage and spirit is key in enhancing credibility and awareness which will inevitably grow revenue for stakeholders and artists. This could be done through fashion, gastronomy, arts, film, live theatre, and/or music. In partnership with other stakeholders such as the private sector, the Tourism Board, and the County Government, creative goods can be marketed both locally and internationally. Curating the "Made in Mombasa" collection will position the county as a centre for culture and arts. This could be integrated into the 'Mombasa Experience' that goes beyond the beach and in return expands the market for creative goods and services.
- **Design data-driven policies:** The lack of comprehensive and reliable data on the value of the creative economy and its contribution to the economy hampers efforts to develop effective evidence-based policies. Inadequate data also perpetuates the perception that the sector is not as important as others such as agriculture, manufacturing, and trade resulting in minimal investment both from public and private sectors. Institutionalising the artists

federation, supported by government and the private sector to undertake the documentation of data, and communicating it to relevant stakeholders would best achieve the desired results. Working in partnership with youth employment efforts such as the Global Opportunity Youth Network, to document and committedly share the value of the sector might attract attention to the support needs of the sector.

- **Integrate the procurement of creative goods and services:** The cross-cutting nature of the creative economy and its potential benefits to other industries means that policy development must be harmonised with that of all other sectors it intersects with such as tourism, hospitality, and trade.

9.2.2 Investment in specific business clusters (ROI, competitiveness of film, fashion)

- **Invest in the film, music, or fashion sector:** Set up high touch options such as film production studios or lighter touch options through film festivals. Private-public partnerships can be leveraged to invest in land, buildings and incentives for film and music production studios. Similar to Canada, where there is significant support for the film industry, Kenya could consider leveraging the artistic talents of local film producers and support a Kenyan film industry based in Mombasa.
- **Leverage industry alliances and partnerships:** Create artist federations and partner with private sector festivals such as Safaricom Jazz Festival and Blaze to showcase artwork. Other agencies that can participate in the creative sector are the Kenya Private Sector Alliance (KEPSA), East Africa Philanthropy Network, and Kenya National Chamber of Commerce and Industry (KNCCI).

9.2.3 Regular art festivals and other campaigns/promotions

(In partnership with government but could be led primarily by civil society and private sector sponsors)

- **Leverage local assets, culture, and history:** Host at least two to three festivals annually (e.g. International Music Festival building on historical trade routes, coastal music and food, a week-long arts and film festival). Creative players can build on the existing Pwani Innovation Week and Hivos events.



Figure 35 Attendees at Pwani innovation week



Figure 36 Poster for Hivos open day



Figure 37 A Canadian Film Studio



Figure 38 International Artists at a music festival

- **Introduce innovative “hooks”:** Add intricate and locally relevant large murals all over the city to complement the white and blue paint of the buildings.


9.2.4 Tax incentives and policy implementation

- **Introduce tax incentives:** Tax incentives have proven to be a great boost to the creative economy. South Africa, for example, offers a 35% tax rebate on all filming projects done in the country (update source). [1] [KN2] The Kenyan government, through relevant agencies, can reform the tax regime and create incentives that will promote the growth of the industry. This may include removal of punitive levies or a reduction of VAT on creative goods as well as the high cost of licenses for operating creative businesses. To accelerate recovery of the sector post-COVID, there is a need to set up fiscal and tax incentives to unlock and stimulate creative productivity.
- **Support policy and tax reform as and ensure proper implementation of policy:** There is need to strengthen implementation frameworks of existing policies that protect creative work. Failure to do this negatively impacts the artists as exemplified in the poorly enforced 2014 local content bill for TV and radio broadcast discussed in earlier sections. Government agencies must work closely with artists and their guilds to achieve this. In addition, government agencies must train their officers to understand the creative sector so that they are able to better enforce the relevant policies. Canada for example has a 35% local content requirement for radio play and broadcasting that has resulted in significant increase and preservation of Canadian music and the arts. Another option is for Kenya to reduce the local content percentage requirement to a more manageable level, but to strictly enforce it.

9.3 PATHWAY 3: BUILDING MARKETS, FINANCING AND MONETISATION

9.3.1 Business model development and monetisation

Improve creative livelihoods: The most challenging aspect of developing a creative job and career is to convert these activities into a dignified and living wage. The sector needs a set of tools and examples of different positions, job roles, and remuneration rates. In the case of entrepreneurs, guidelines on how to find markets and the skills to position the business to access the markets are required. A working group to find local and global case studies develop a set of tools and training programmes could facilitate this.



"The creative sector is not only one of the fastest growing sectors in the world, but also can be highly transformative in terms of income generation, job creation and a nation's earnings through export"
(UNESCO 2013).

- **Establish supply chain linkages:** There is an opportunity to reach the potential of creative economic growth by fostering and coordinating supply chain links to hotels, events, and galleries, including local, regional, and global access to markets through networks. In Mombasa, we would propose a concerted effort in developing, coordinating, and financing creative supply chains in partnership with GOYN.
- **Encourage the procurement of local creative products:** Fostering “buy local” efforts and procurement by creating strategic partnerships with the county government, the private sector and bodies such as the Tourism Board, Kenya Private Sector Alliance (KEPSA), Export Processing Zone (EPZ) Authority, and Kenya Association of Manufacturers (KAM) among others, could accelerate consumption of creative goods and services. For instance, the county government of Mombasa could allocate a quota dedicated to procuring particular creative goods and services from Mombasa creatives. The private sector could be incentivised through reduced levies to procure and consume Mombasa creative goods and services. Special industrial zones like the EPZ should be leveraged to ensure that creative goods meet international standards and link them to global markets through promotions in international trade fairs and partnerships.

9.3.2 Enhanced digital access to improve access to markets and monetisation

- **Leverage technology for market linkages and monetisation:** Technology can scale market linkages for creative goods and services in Mombasa. The ability to link directly to the consumer on digital platforms is replacing traditional distribution and consumption models, many of which were discussed in the “Skills Anticipation” section. The new platforms have also created new monetisation models for creative products, especially through micro-advertisements and on-demand payment for content and online purchases. Investing in commerce platforms and supporting artists to acquire digital skills may change fortunes for the artists.
- **Tap into online integrated marketplaces or platforms:** One of the biggest challenges for creative businesses is the extreme fragmentation and small-scale nature of the creators. Marketplaces currently exist in Kenya for other trades such as Kuhustle and Lynk, but not for the creative sector. Setting up a platform to aggregate goods and services and create links to markets would address a critical challenge in Mombasa of small-scale fragmented activities.



Figure 39 Mombasa Youth Creating Digital Content (SwahiliPot Hub)

9.3.3 Investment funds focused on “micro-business” and incubation

- **Create arts and culture funds:** Creation of a Mombasa art fund could provide an alternative source of finance. The fund could be driven by a public-private partnership model. The government could allocate a budget and seek support from the private sector and private donors. The management of such a fund would be governed by an independent body that would ensure the mandate is executed. Development partners have made significant efforts in contributing small grants to artists and organisations that support artists, however, most of this funding goes towards supporting creative activities for activism such as “Ma vulture inc” by Boniface Mwangi a leading photographer who pushed to create civil rights awareness. Funds can be set up with seed funding through partnerships with the government youth fund, the HEVA Fund, HIVOS and other development partners.
- **Incentivise financial institutions to fund creatives:** There are different models tried in a different sector that promote access to finance to underserved segments. For example, ACELI Africa closes the gap between banks and smallholder farmers by providing financial incentives to lenders to mitigate their risk, while on the other hand, facilitating technical assistance to agricultural SMEs so that they can qualify for and manage finances received. The gap in financing for creative activity can be closed by studying similar models and adopting what fits within the sector.
- **De-risk credit for financiers:** As seen earlier, de-risking investments by financiers in the creative sector is critical as creatives often do not meet credit requirements. Another recommendation from the latest HEVA report is the provision of a creative business rescue finance facility and establishment of a Guarantee Fund Facility to increase access to commercial financing for the CCI sector (HEVA, 2020). This will not only cushion the creatives from financial losses but also provide capital to kick-start their businesses.

9.4 PATHWAY 4: ART SPACES, INFRASTRUCTURE AND COLLABORATIONS

9.4.1 Infrastructure and shared assets

- **Provide assets and infrastructure:** Most creative youth that are interested in creating content have expressed their challenges in producing without access to quality equipment for video, film, lights photography and editing. Again, similar to the farming model, creating spaces where youth can access and cheaply rent high end equipment would go a long way towards developing high quality content. For example, with relatively little investment, the county/national government could create a movie studio facility, with editing suites and professional equipment for daily rental that creatives can operate at subsidised rates.
- The GOYN team in partnership with SwahiliPot and others can work on sponsorships and partnerships with strategic partners to donate or lease equipment.

9.4.2 Hubs and spaces for creating work, peer connections and showcasing art

- **Invest in spaces and hubs:** These spaces can be provided by the government, private sector, and development partners. Spaces can be art studios, art market spaces, and art innovation labs. Reducing taxes and levies on the importation of critical tools can further lower costs of productions, making locally produced goods and services marketable. A good example is the Swahilipot Hub outdoor amphitheatre in Mombasa, that is often used for local art and cultural events. Further, art hubs and spaces for content development and performance that are distributed and of varying sizes and types of creative work could build a more vibrant and robust creative ecosystem.

9.4.3 Online portal to connect youths to creative jobs, events, equipment, peers

- **Create a 'one-stop-shop' portal:** As shared in the workshops and surveys, youth often do not have access to the right information, partners, or peers. An online portal, hosted at GOYN and SwahiliPot and

PYN and partners would be able to share important and timely information on creative opportunities, events, equipment availability and jobs across the county. Existing creative platforms such as those by the British Council, Alliance Française, Goethe Institute, HIVOS and HEVA fund can all be integrated to create a 'one-stop-shop' for creative opportunities.

9.4.4 Coordinated council/arts group amongst civil society members

- **Build a collective to support the creative sector:** A collaborative group to promote and coordinate the sector can be established to fill the gaps identified within the creative sector in Mombasa. All key stakeholders including the artists, county and national government, private sector and skilling partners need to synergise and work together to promote the sector as viable, for career opportunities for the youth on one hand, and as a viable sector for investment from the government, development and private sector on the other. The collective would also be responsible for making recommendations based on data and youth interests.



Figure 40 A videography team poses for a picture on set

These issues of associational divide were echoed by HIVOS in 2016, which stated that “the current state of associations in East Africa is that they are fragmented, disunited and lack a consistent agenda on how to engage the government and different industries to ensure the standards of the industry consistently improve”. (HIVOS, 2016)

10 THE PATHWAY FORWARD

10.1 Potential steps to be taken by stakeholders

Private Sector

- Data and evidence building for the value of the creative sector
- Establishment of a council that can engage different stakeholders and lobby on behalf of artists
- Increased partnerships between artists guilds and associations, training institutes, and other ecosystem players to facilitate the idea and information exchange
- Establishment of a creatives board comprising different stakeholders similar to the Tourism Board of Kenya to promote creatives and their work

Government

- Create regulatory infrastructure for artist guilds and associations
- Allocate specific funds to support research, innovation, and funding of the creative sector

	<ul style="list-style-type: none"> Participate in Public-Private sector partnerships to grow collaboration between artists, donors, and government
Civil Society	<ul style="list-style-type: none"> Creation of safe spaces for artists to learn, create and exhibit works of art Protect artists work and expression from the government law enforcers and crackdowns based on role in activism Build capacity of creatives to use art as a tool for social change sustainably
Fund	<ul style="list-style-type: none"> Build more investable creative start-ups through technical bus Identify ways to incentivise mainstream financial institutions such as banks to s to invest in the creative businesses Challenge regulations that make it difficult for the creatives to formalise businesses, as investment opportunities for informal business are limited
Youth	<ul style="list-style-type: none"> Safe spaces to learn, create and express works of art fund to support those that enter the sector to facilitate the acquisition of tools and pieces of equipment Funding and scholarships for those that want to acquire skills but cannot afford . Agitate for favourable laws and policies to make it easier for an artist to practice works of art and earn a livelihood
TVET and colleges	<ul style="list-style-type: none"> Increase investment for research and innovation to improve the quality of education disseminated Build the capacity of teachers and trainers through exchange prog Industry partnerships to facilitate the exchange of ideas and making learning more demand-driven Review criteria for teachers and trainers rely more on those with experience as opposed to those with a higher level of education

10.2 Quick wins and immediate pilots

Project	Approach	Outcome
Film	<ul style="list-style-type: none">• Develop a fully equipped film studio.• The studio will target up to two sitcoms per and two feature films in response to current local content demand by TV stations	<ul style="list-style-type: none">• Develop a PPP approach between the private sector, government, and development partners to encourage co-investment <ul style="list-style-type: none">• The production of the two sitcoms and two films will create an additional 400 jobs in Mombasa
Festivals	<ul style="list-style-type: none">• In addition to Pwani Innovation Week and Mombasa Cultural Week, aim for two large annual festivals such as an international music festival and an international film and theatre festival	<ul style="list-style-type: none">• Develop a PPP approach between the private sector, the tourism board, and the county government to sponsor the festivals <ul style="list-style-type: none">• These two festivals would provide an additional 300 jobs
Skills	<ul style="list-style-type: none">• Target 50 master craftspeople, and experienced artists to each mentor 10 youths interested in films and festivals	<ul style="list-style-type: none">• Incentivise the master craftspeople and senior artists to take in youths for apprenticeship by providing stipends for the 500 youth <ul style="list-style-type: none">• 500 youths trained to match opportunities created by the first two investments

11 CONCLUSION



The creative sector is critical to developing youth skills and employment in Mombasa County because both passion and income are key motivators for participating in the sector. These are a catalyst for job creation. Additionally, stakeholders should explore natural synergies that occur between Mombasa's rich cultural heritage, creative and tourism industry.

If successfully implemented, the identified pathways could facilitate access to meaningful creative jobs by the youth that could result in sustainable livelihoods.

Figure 41 A young animated artist performs with a microphone in hand

Further, a systemic shift must take place to create a policy landscape that incentivises the development of the sector and its creators. Youths in creative sectors are either self-employed or employed and mostly operate in the informal sector. The majority earn less than the minimum wage while exposed to uncertainty and the lack of social security making it difficult for youth to focus and develop within the sector leading many to quit for other opportunities or seek multiple informal positions at the same time, creating a 'bouquet' of gig economy jobs. As with any youth initiative, particularly pertaining to employment, the above would be contingent on the full participation of key stakeholders. Notably, the involvement of both county and national government policymakers in designing and implementing policy frameworks to support the monetisation of youth creative products as well as private and public sector investments in seed funding, infrastructure development and youth skilling. If even a fraction of the above pathways are successfully implemented, there is no doubt that the creative sector can be a driving force in the transformation of youth livelihoods in Mombasa and across Kenya.

"Whether it be arts and crafts, books, films, paintings, festivals, songs, designs, digital animation or video games, the creative industries are more than just sectors with good economic growth performance and potential. They are expressions of the human imagination spreading important social and cultural values," said Dr Mukhisa Kituyi, UNCTAD. (UNCTAD, 2013)

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13 APPENDICES

13.1 List of all stakeholders interviewed and involved in roundtables

<i>One-one-one expert interviews</i>				
Date	Name	Title	Organisation	Location
14 Jan 2020	Prof John Mugubi	Dean, Film and Theatre Arts	Kenyatta University	Nairobi
15 Jan 2020	Sylvia Gichina	CEO	The Art Project	Nairobi
17 Jan 2020	Philip Karanja	Director	PhillT Productions	Nairobi
	Abel Mutua	Script Writer		
18 Jan 2020	Gregg Tendwa	Former Creative Director	HIVOS	Nairobi
21 Jan 2020	Zilpah Shirly Akumu	Director	Tuchipuke Pamoja Africa	Mombasa
20 Jan 2020	Mahmoud Noor	Chairperson	Swahilipot Hub	Mombasa
21 Jan 2020	Fatma Twahir	Curator	Fort Jesus	Mombasa
21 Jan 2020	Dr Khalid	Director	Heritage Training Institute	Mombasa
4 Feb 2020	Wycliffe Buhere	Lecturer	Kenya Institute of Mass Communication	Nairobi
20 Feb 2020	Wakake Otieno	Live music performer in Mombasa		Nairobi
26 Feb 2020	Alfred Sigo	Founder	Pwani Youth Network	Mombasa
26 Feb 2020	Anthony Juma Nyando	Managing Director	Music producer in Mombasa	Mombasa
<i>Roundtable 1: March 10, 2020, Park Inn By Radisson, Nairobi</i>		<i>Roundtable 2: March 12, 2020, English Point Marina, Mombasa</i>		
Name	Organisation	Name	Organisation	

Baraza Mwabe	Mwanaume ni Effort Kenya	Zilpah Shirly Akumu	Tuchipuke Pamoja Africa	
Philip Karanja	Philt production	Mark Mghoro	Tuchipuke Pamoja Africa	
Gregg Tendwa	Dj/ Amnesty international	Otieno Wakake	Madi in Malini	
Daisy Chesang	Metta Lab	Maimuna Siraji	Pad a dada	
Kajuju Gicharu	Trainer/ crafter	Atrash Mohamed Ali	Aga Khan Foundation East Africa	
Lilian Wanjiru	Fashion entrepreneur/ Student	Hardik Modka	The Silent Itch	
Milka Chege	HIVOS	Ernest A. Masai	Tuchipuke Pamoja Africa	
Titus Nderitu	Ariel affair Africa	Shufaa Yakut	Swahilipot Hub	
Boniface	Arts Contributor -Daily nation	Daniel W. Ngahu	Msanii List/BTB	
		Rajab Salim	Swahilipot Hub	
		Juma Yusuf Kibwana	Lens	
		Alfred Sigo	Pwani Youth Network	
		Mlaghui Kulola	The Silent Itch	

13.1 List of Kenyan universities that host a “Culture week”

1. Co-operative University of Kenya
2. Catholic University of East Africa
3. Strathmore University
4. St. Paul's University
5. Kisii University
6. Kibabii University
7. Technical University of Mombasa
8. United State International University

13.3 SKILLS ANTICIPATION

13.3.1 Long list of opportunity job roles

Table 7 Sample job roles across various creative value chains (UNESCO, 2009)

36	37	45	24	9	8	23	12
Film and thea	Music and performance	Visual arts and crafts	Fashion and design	Digital Media	Culture and heritage	Festivals (cross-cutting)	Cross cutting
Printing	Printing	Space providers (incl. stuc	Material suppliers	Videography	Guides	Event manager	Operations manager
Costumes	Costumes	Logistics and transport	Fashion design	Photography	Interpreters	Event coordinator	Administration
Sound providers	Sound providers	Printing	Studios	Social media managers	Curators	Operations team	Finance and accounting
Sound engineers	Sound engineers	Curating	Models	Content creators/ influ	Collectors	Artist booker	Advertising
Software	Software	Auctioning	Event management	Makeup artistry	Merchandising	Field manager	Marketing
Band members	Band members	Graphic design	Promotion	Petouch artistry	Space management	Exhibition coordinator	Sales
Logistics and transport	Logistics and transport	Ticketing	Product management	Graphic design	Exhibition coordination	Set up team	Driver
Power providers	Power providers	Promotion	Merchandising	Web design	Ticketing	Audio visual crew	Messenger
Make up artistry	Make up artistry	Art agents	Textile design	Digital art		Ushers	Cleaner
Event management	Event management	Airbrush	Quality assurance			Ticketing	Store keeper
Graphic design	Graphic design	Spray painter	Bedding design			Security	Security
Ticketing	Ticketing	Textbook illustrator	Fabric coloring			Emergency response team	Distributor
Promotion	Promotion	Storyboarding	Pattern grading			Promoters	
Film Director	Composers	Cartoonist	Sewing machine operators			Make up team	
Director Photography	Sound recorder	Special effect make up	Seamstress/ tailors			Prop makers	
Camera operators	Video recorder	Muralist	Technicians			Costume providers	
Production assistant	Mixing	Food stylist	Photographers			Logistics and transport	
Film Editors	Mastering	Floral arrangement	Transport and logistics			Accommodation and travel	
Composer (sound)	Accompanist	Mounting	Cleaners			Catering	
Color Scaler	Audio technician	Photjournalism	Store keeper			Bartenders	
Script writer	Instrument technician	Portraits photographer	Sales assistant			Garbage collection	
Costume designer	Producer	Weeding photographer	Stylist			Décor providers	
Make up Artist	Booking agents	Tool designer	Social media managers			Sanitation providers	
Hairstresser	Graphic designer	Concept artist	Brand strategists				
Prop master	Retailer	Porter					
Gaffers (light)	Event set up team	Woodturner					
Set designer	Sound manager	Mosaic designer					
set constructors	Equipment technician	Jeweler					
Casting	Security	Weaver					
Foley artist	Master of ceremony	Glass artists					
Graphic designer	Event planner	Logos and branding					
Head of operations	Event manager	Sign writer					
IT	Stage manager	Magazine layout					
Talent manager	Costume makers	Typographer					
Cook	Transport and logistics	Pattern maker					
Loader (film, battery)	Catering	Leather craftsmen					
	Instrumentalists	Metal worker					
		Stereographer					
		Art teacher					
		Exhibition coordinator					
		Researcher					
		Sculptor					
		Furniture designer					
		Card designer					
		Collectors					

13.3.2 Occupational trends detailed assumptions per scenario

Film

Scenario 1: Current p- 37 job roles 1890 jobs			Scenario 2: Future p 37 job roles 3024 jobs		
Assumptions	Value	Notes	Assumptions	Value	Notes
No. of sitcoms per TV stn	3	Assume Mombasa creatives are involved in the production of 3 sitcoms per TV station (1 daytime, 2 evening)	No. of sitcoms per TV stn	4	Assume Mombasa creatives are involved in the production of 4 sitcoms per TV station (1 daytime, 2 evening)
No. of TV stations	10	RTs of total number of TV stations nationally	No. of TV stations	12	RTs of total number of TV stations nationally (66)

Job role units per st No. of jobs

Film Director	1	30
Director Photography	1	30
Camera operators	2	60
Production assistant	2	60
Film Editors	1	30
Composer (sound)	1	30
Color Scaler	1	30
Script writer	2	60
Costume designer	1	30
Make up Artist	2	60
Hair dresser	2	60
Prop master	1	30
Gaffers (light)	2	60
Set designer	1	30
set constructors	4	120
Cast	10	300
Folly artist	5	150
Finance	1	30
Marketer	1	30
Graphic designer	1	30
Head of operations	1	30
Distributor	2	60
IT	1	30
Talent manager	1	30
Cook	1	30
Loader (film, battery)	1	30
Driver	1	30
Messenger	1	30
Cleaner	2	60
Digital marketer	2	60
Titles	1	30
Visual effects	1	30
Store keeper	1	30
Prosthetics	1	30
Animation	1	30
Security	2	60
Film Consultants	1	30

Job role units per st No. of jobs

Film Director	1	48
Director Photography	1	48
Camera operators	2	96
Production assistant	2	96
Film Editors	1	48
Composer (sound)	1	48
Color Scaler	1	48
Script writer	2	96
Costume designer	1	48
Make up Artist	2	96
Hair dresser	2	96
Prop master	1	48
Gaffers (light)	2	96
Set designer	1	48
set constructors	4	192
Cast	10	480
Folly artist	5	240
Finance	1	48
Marketer	1	48
Graphic designer	1	48
Head of operations	1	48
Distributor	2	96
IT	1	48
Talent manager	1	48
Cook	1	48
Loader (film, battery)	1	48
Driver	1	48
Messenger	1	48
Cleaner	2	96
Digital marketer	2	96
Titles	1	48
Visual effects	1	48
Store keeper	1	48
Prosthetics	1	48
Animation	1	48
Security	2	96
Film Consultants	1	48

Music (radio and online platforms)

Scenario 1: Current p- 14 job roles 120.96 jobs			Scenario 2: Future p 14 job roles 241.92 jobs		
Assumptions	Value	Notes	Assumptions	Value	Notes
No. of studios needed per	6	Source: Mombasa-based music producer	No. of studios needed per	12	Source: Mombasa-based music producer
No. of songs produced per	5	Assume that local vernacular radio new hits turnover is 1 month	No. of songs produced per	5	Assume that local vernacular radio new hits turnover is 1 month
Lifespan of a song (month)	2	RTs of total number of TV stations nationally	Lifespan of a song (month)	1	RTs of total number of TV stations nationally
Number of unique local stn	58	by law	Number of unique local stn	58	by law
% local songs required	40%	Average of one unique song every 8 min (fact)	% local songs required	40%	Average of one unique song every 8 min (factoring in song repeats, talk show time, adverts, transitions etc.)
Unique songs played per	10		Unique songs played per	10	

Job role units per st No. of jobs

Composers	1	6
Sound recorder	1	6
Video recorder	2	12
Mixing	1	6
Mastering	1	6
Accompanist	3	17
Audio technician	1	6
Instrument technician	1	6
Producer	1	6
Booking agents	2	12
Graphic designer	2	12
Distributor	3	17
Marketer	1	6
Promoter	1	6

Job role units per st No. of jobs

Composers	1	12
Sound recorder	1	12
Video recorder	2	23
Mixing	1	12
Mastering	1	12
Accompanist	3	35
Audio technician	1	12
Instrument technician	1	12
Producer	1	12
Booking agents	2	23
Graphic designer	2	23
Distributor	3	35
Marketer	1	12
Promoter	1	12

Music (live performances)

Scenario 1: Current p- 13 job roles 540 jobs			Scenario 2: Future p 13 job roles 1680 jobs		
Assumptions	Value	Notes	Assumptions	Value	Notes
No. of establishments (%)	20	Top hotels, bars and restaurants	No. of establishments (%)	40	Assuming more hotels, bars and restaurants have live performances, some sponsored by corporate
No. of unique live perform.	1	Assuming live performances occur the week	No. of unique live perform.	2	Assuming unique live performances occur twice a month

Job role units per st No. of jobs

Event set up team	5	100
Sound manager	1	20
Equipment technician	1	20
Master of ceremony	1	20
Event planner	1	20
Event manager	1	20
Stage manager	2	40
Costume makers	2	40
security	4	80
Transport and logistics	1	20
Catering	2	40
Instrumentalists	4	80
Ticketing	2	40

Job role units per st No. of jobs

Event set up team	5	400
Sound manager	1	80
Equipment technician	1	80
Master of ceremony	1	80
Event planner	1	80
Event manager	1	80
Stage manager	2	160
Costume makers	2	160
security	4	320
Transport and logistics	1	80
Catering	2	160
Instrumentalists	4	320
Ticketing	2	160

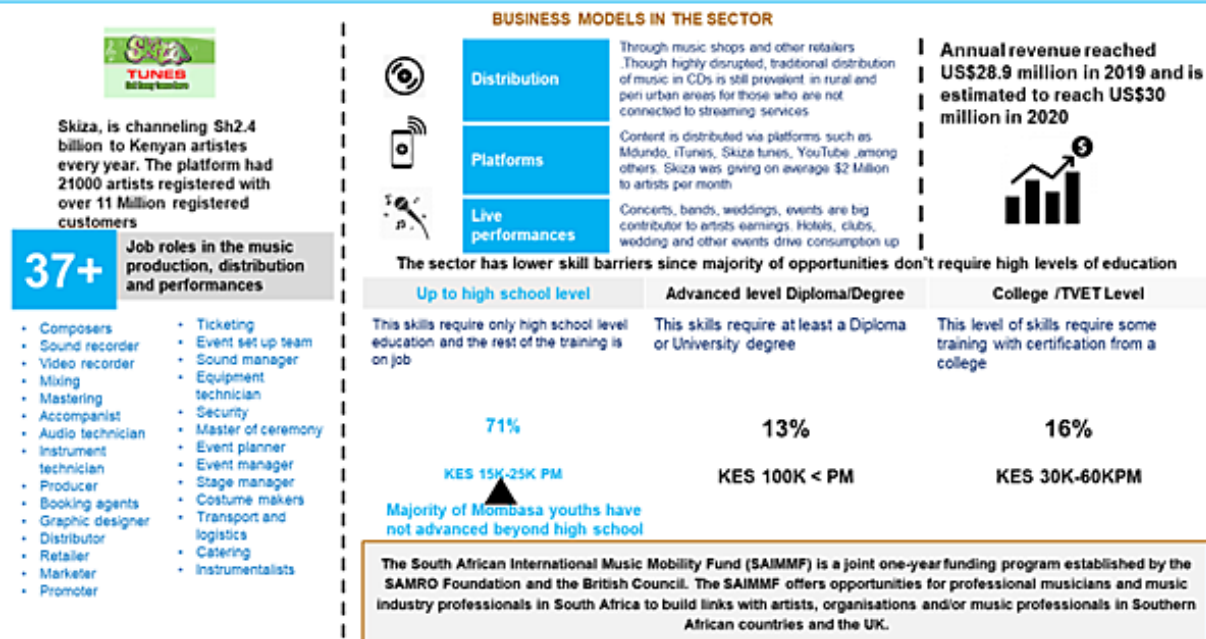
Visual arts and crafts

Scenario 1: Current p: 6 job roles 170 jobs			Scenario 2: Future p: 6 job roles 960 jobs		
Assumptions	Value	Notes	Assumptions	Value	Notes
Nb. of exhibition spaces	5	—	Nb. of exhibition spaces	10	Assume new investment in art spaces and exhibitions
Nb. of exhibitions per space	0.5	Assume one every two months	Nb. of exhibitions per space	1	Assume one every month
No. of unique exhibitions	6	Calculation	No. of unique exhibitions	12	Calculation
Job role	Units per ex	No. of jobs	Job role	Units per ex	No. of jobs
Space provider	1	30	Space provider	1	120
Curator	1	20	Curator	1	120
Exhibiting artist(s)	2	40 Assume average of 2 per exhibition	Exhibiting artist(s)	2	240 Assume average of 2 per exhibition
Promotion and ticketing	1	20	Promotion and ticketing	1	120
Sales and distribution	1	20	Sales and distribution	1	120
Logistics	2	40	Logistics	2	240

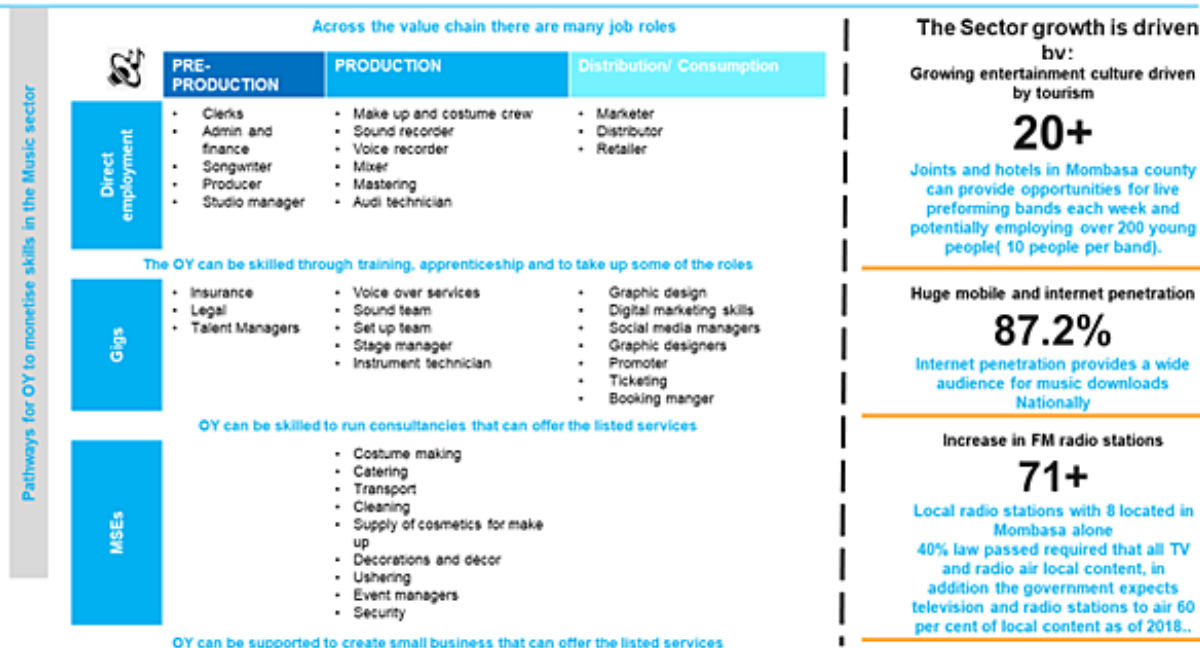
Festivals and events

Scenario 1: Current p: 29 job roles 1192 jobs			Scenario 2: Future p: 29 job roles 3848 jobs		
Assumptions	Value	Notes	Assumptions	Value	Notes
Nb. of festivals per year	4	One every quarter	Nb. of festivals per year	4	One every quarter
Target attendance	3000	Medium sized festival	Target attendance	10000	Large festival
Event factor	3	Target attendance divided by 1000	Event factor	10	Target attendance divided by 1000
No. of MCs per festival	2		No. of MCs per festival	2	
No. of performing acts per festival	4	4 acts per stage over 4-8 hours, 1 stage	No. of performing acts per festival	8	4 acts per stage over 4-8 hours, 2 stages
Entourage per performing act	4		Entourage per performing act	4	
Job role	Unit per 1000	No. of jobs	Job role	Unit per 1000	No. of jobs
Event manager	1	12	Event manager	1	40
Event coordinator	2	24	Event coordinator	2	80
Operations team	4	48	Operations team	4	160
Admin and finance	1	12	Admin and finance	1	40
Artist booker	1	12	Artist booker	1	40
Field manager	1	12	Field manager	1	40
Exhibition coordinator	1	12	Exhibition coordinator	1	40
Set up team	10	120	Set up team	10	400
Audio visual crew	4	48	Audio visual crew	4	160
Ushers	10	120	Ushers	10	400
Ticketing	5	60	Ticketing	5	200
Security	10	120	Security	10	400
Emergency response team	2	24	Emergency response team	2	80
Cleaners	5	60	Cleaners	5	200
Promoters	1	12	Promoters	1	40
Make up team	2	24	Make up team	2	80
Prop makers	2	24	Prop makers	2	80
Costume providers	1	12	Costume providers	1	40
Transport and logistics	2	24	Transport and logistics	2	80
Accommodation and travel	2	24	Accommodation and travel	2	80
Catering	2	24	Catering	2	80
Bartenders and waiters	10	120	Bartenders and waiters	10	400
Marketers	2	24	Marketers	2	80
Advertisers	1	12	Advertisers	1	40
Garbage collection	5	60	Garbage collection	5	200
Décor providers	5	60	Décor providers	5	200
Master of ceremony	NA	8	Master of ceremony	NA	8
Performing acts	NA	16	Performing acts	NA	32
Entourage of performing acts	NA	64	Entourage of performing acts	NA	128

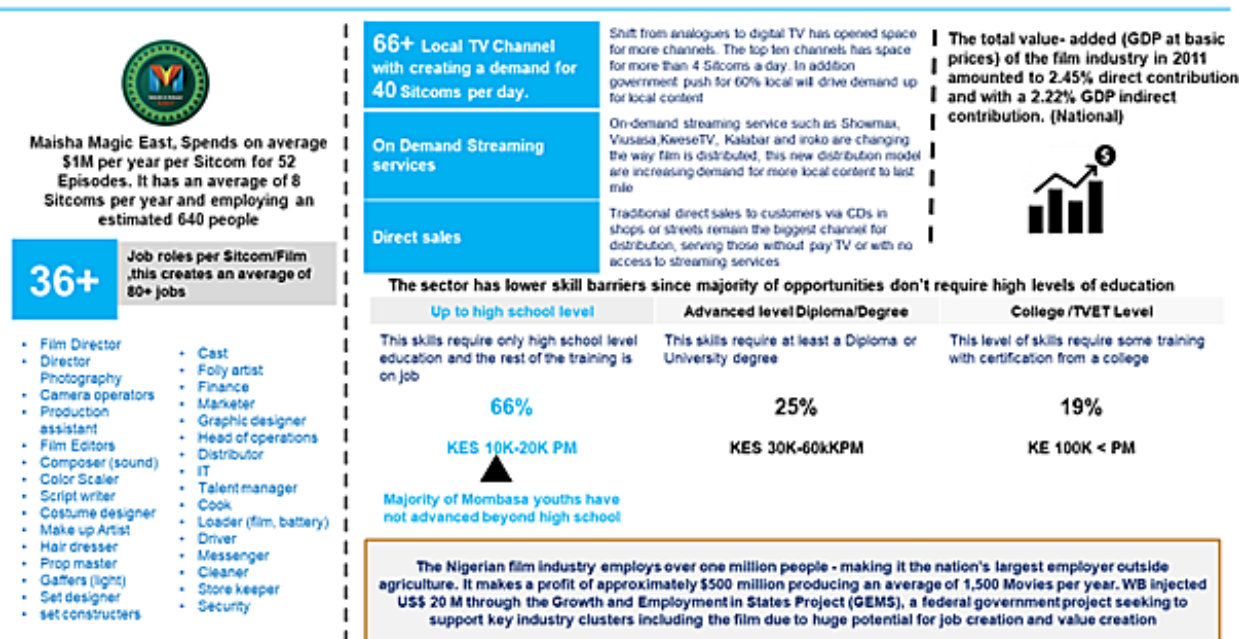
Building the Music sector in Mombasa can drive employment for Opportunity Youths



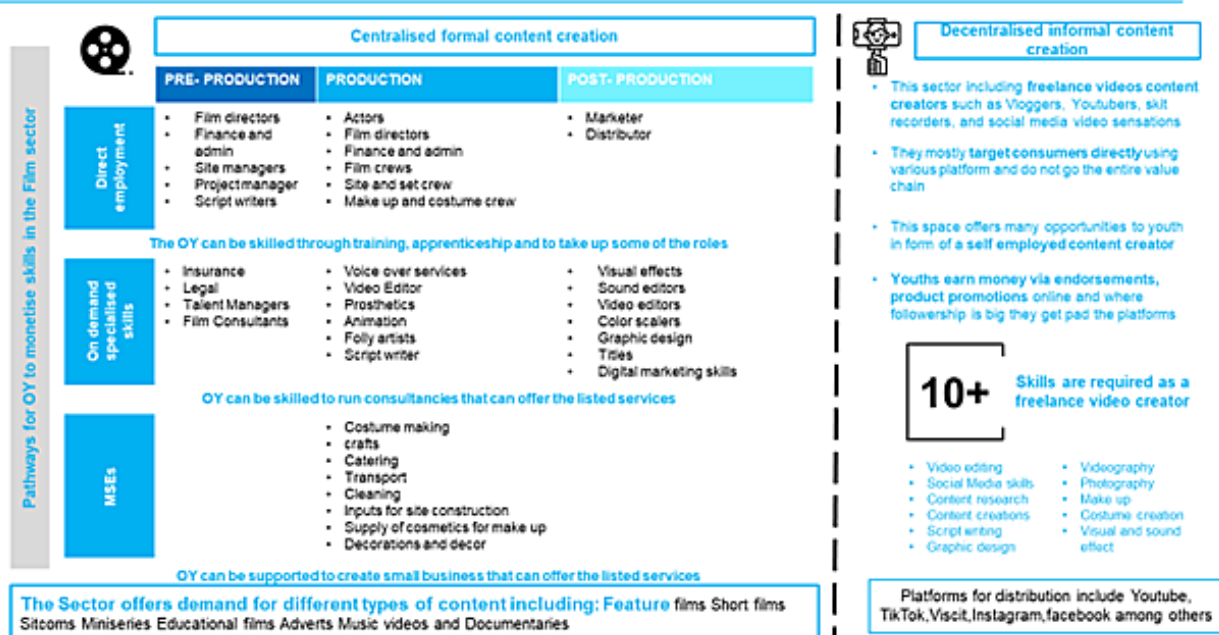
Opportunity youth in Mombasa can benefit from the different roles the sector Music offers



The film sector can drive employment among opportunity youths



Opportunity youth in Mombasa can benefit from the different roles the sector Film offers



Visual Arts, Craft and Design industry can provide a wide range of opportunities for opportunity youths



In 2019 The Modern and Contemporary Art Auction East Africa was held Radisson Blu Hotel, Nairobi. The total auction sales exceeded Sh30 million, with 90 per cent of the 59 lots sold.

45+

Job roles in the visual arts and crafts industry

- Spray painter
- Textbook illustrator
- Story boarding
- Cartoonist
- Special effect make up
- Muralist
- Food stylist
- Floral arrangement
- Mounting
- Photojournalism
- Portraits photographer
- Weeding photographer
- Sales
- Marketers
- Tool designer
- Concept artist
- Porter
- Wood turner
- Mosaic designer
- Jeweler
- Weaver
- Glass artists
- Logos and branding
- Sign writer
- Magazine layout
- Typographer
- Pattern maker
- Leather craftsmen
- Metal worker
- Stereographer
- Art teacher
- Exhibition coordinator
- Researcher
- Sculptor
- Furniture designer
- Card designer

BUSINESS MODELS IN THE SECTOR

Art Markets	Open art markets, such as the Maasai market, Flea market, art studios such as the Godown art center and art exhibitions in malls, restaurants among other
Online sales	Online platforms, such as social media pages like Facebook and Instagram are becoming popular places to sale pieces of art in addition to art websites
Art auctions	The east Africa art auction and few others are emerging as new platforms to sale art

Auctioning art fairs and online sales are other growing trends in the local art market. The global art auction figures rose by three per cent in 2019 reaching USD\$29.1 billion (Sh2.9 trillion)



The sector can benefit from skilling the youths on the different roles

Up to high school level	Advanced level Diploma/Degree	College /TVET Level
This skills require only high school level education and the rest of the training is on job	This skills require at least a Diploma or University degree	This level of skills require some training with certification from a college
55%	24%	21%
KES 5K-10K PM	KES 60K < PM	KES 30K-60K PM

Majority of Mombasa youths can benefit from some form of training and apprenticeship

Festivals provide a wide range of opportunities to drive employment among opportunity youths



Since its beginning in 2004, it has generated over \$70 million in revenue through tourism in Zanzibar. It has a team of 150 crew members directly and employed thousands indirectly

23+

Job roles in festivals absorbing on average 100 direct and over 200 indirectly.

- Direct**
 - Event manager
 - Event coordinator
 - Operations team
 - Admin and finance
 - Artist booker
 - Field manager
 - Exhibition coordinator
 - Set up team
 - Audio visual crew
 - Ushers
 - Ticketing
 - Security
 - Emergency response team
 - Cleaners
 - Promoters
- Indirect**
 - Make up team
 - Prop makers
 - Costume providers
 - Transport and logistics
 - Accommodation and travel
 - Catering
 - Barenders
 - Marketers
 - Advertisers
 - Garbage collection
 - Decor providers

BUSINESS MODELS IN THE SECTOR

Live performances	People pay to watch performing artists. Revenues from sale of tickets are one of the forms of generating income
Endorsements and Sponsorships	Private sector can sponsor festivals through endorsements such as the Safaricom jazz festival, in return they receive premium priority for advertisements
Vendors	Vendors rent spaces during event to sale different goods and services that complement the festival experiences

Data on economic contribution



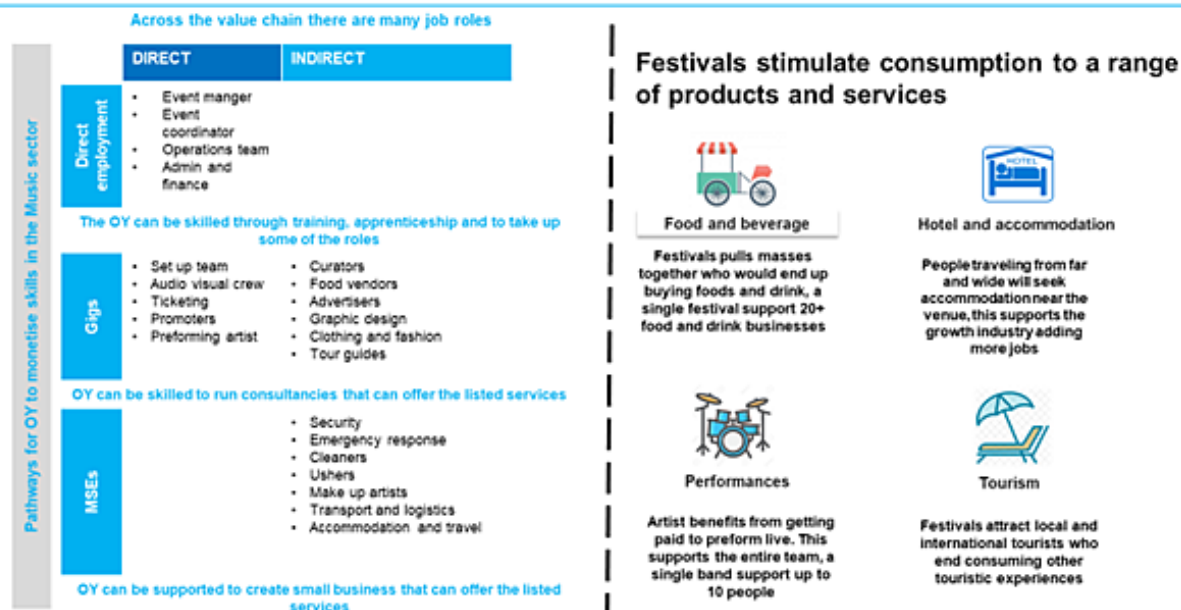
The sector has lower skill barriers since majority of opportunities don't require high levels of education

Up to high school level	Advanced level Diploma/Degree	College /TVET Level
This skills require only high school level education and the rest of the training is on job	This skills require at least a Diploma or University degree	This level of skills require some training with certification from a college
71%	18%	11%
KES 15K-25K PM	KES 100K < PM	KES 30K-60K PM

Majority of Mombasa youths have not advanced beyond high school

The Perth International Arts Festival is a three-week long festival, held annually in February and it attracts more than 300 000 patrons to events in Perth and well as in the Great Southern region. It has to become a festival of major international standing. It provides huge opportunities for Tourism contributing and contributing to the local economy

Festivals provide a wide range of opportunities to drive employment among opportunity youths



Fashion industry can provide a wide range of opportunities to drive employment among opportunity youths

