

## Export or Die? Why Nigerian Designers Ignore Global Markets While Importing \$1.5 Billion of Foreign Goods

Kennedy Jude Eweka<sup>1</sup>, Abraham David Morakinyo<sup>2\*</sup>, Ifeakachukwu Valentine Omem<sup>3</sup> and Chizoba Maryann Morakinyo<sup>4</sup>

<sup>1,3</sup> *Department of Fine and Applied Arts, Faculty of Environmental Sciences, University of Benin, Benin City, Edo State, Nigeria*

<sup>2\*</sup> *Department of Industrial Design, Faculty of Environmental Sciences, Modibbo Adama University Yola, Adamawa State, Nigeria*

<sup>4</sup> *Department of Library and Information Sciences, Faculty of Management Sciences, Modibbo Adama University, Yola, Adamawa State, Nigeria*

\*Corresponding Author: [morakinyo@mau.edu.ng](mailto:morakinyo@mau.edu.ng) | ORCID: 0009-0000-0725-6867

### Abstract

Nigeria annually imports consumer goods, furniture, ceramics and manufactured products valued at approximately \$1.5 billion, a figure that coexists paradoxically with a large, formally trained community of industrial designers and applied arts practitioners who remain substantially absent from global export markets. This paper investigates the structural, institutional and perceptual barriers that explain this paradox, drawing on primary survey data from 45 design educators, practitioners and students across 18 Nigerian states. The study finds that only 6.7% of respondents identified export and global market access as the most significant future trend for Nigerian design — a figure that stands in sharp contrast to the scale of the import dependency problem. Analysis of challenge indicator data, qualitative policy narratives and sustainability integration profiles reveals a sector constrained by infrastructure deficits, funding scarcity, weak policy frameworks and an inward-looking educational culture. Drawing on export readiness theory, creative economy frameworks and the resource dependence perspective, the paper argues that export disengagement is not a preference but a structural outcome of accumulated institutional neglect. It connects directly to companion findings on physical infrastructure deficits documented across the same 18 states (Morakinyo et al., 2026), establishing that the workshop and the world market are separated by the same underlying failures. The paper recommends a national design export strategy, accreditation-linked infrastructure investment and curriculum reform oriented towards global competitiveness.

**Keywords:** Nigerian design, Export readiness, Creative economy, Import substitution, Industrial Design, Design policy, Global markets

## 1. Background

Nigeria occupies a peculiar position in the global creative economy. It is the continent's most populous nation, home to a large body of university-trained designers and applied arts practitioners and the originating ground of cultural traditions — in textile, ceramic, metalwork and furniture production — that carry international recognisability and commercial appeal (Eze and Nwosu, 2020; Nwankwo, 2018). Yet, year after year, the country imports substantial volumes of the very categories of goods that its trained designers could, in principle, produce. The National Bureau of Statistics (2023) records that Nigeria's imports of manufactured consumer goods, furniture, ceramics, plastics and related categories exceeded \$1.5 billion annually in the period 2021 to 2023. Meanwhile, the contribution of design and creative industries to Nigeria's export earnings remains negligible — a fraction of a percentage point in official trade statistics (UNCTAD, 2022).

This gap is not simply an economic inconvenience. It represents a structural failure with consequences extending across employment, skills utilisation, foreign exchange conservation and national identity. Countries with comparable creative endowments — Ghana, South Africa and, at a broader scale, India and Brazil — have developed policy frameworks specifically designed to convert design capability into export performance (British Council, 2020). Nigeria has not. The reasons for this failure are poorly understood in the academic literature, partly because the Nigerian design sector itself remains understudied as a unit of economic and policy analysis (Okonkwo, 2021; Adelabu and Fatuyi, 2020).

The literature on creative economy exports from developing economies identifies several structural preconditions for design export readiness: adequate physical infrastructure for production at scale; access to digital marketing and e-commerce platforms; professional standards frameworks that support quality assurance; and educational systems that orient graduates towards both local production and global market participation (UNESCO, 2013; UNCTAD, 2022). Morakinyo et al. (2026), in a companion study mapping design makerspaces, workshops and technology hubs across 18 Nigerian states, establish that 84.4% of design practitioners rated their regional infrastructure as either Poor or Fair — a baseline condition that is structurally incompatible with the scale of production and quality assurance required for sustained export participation. The present paper builds directly on those findings by examining the export-facing dimensions of the same structural problem.

The theoretical frame of this paper draws on three interlocking bodies of literature. First, export readiness theory — particularly the firm-level and sector-level frameworks developed by Diamantopoulos and Kakkos (2007) and adapted for creative industries by Potts and Cunningham (2008) — provides a framework for understanding why sectors with latent export potential fail to activate it. Second, the resource dependence perspective (Pfeffer and Salancik, 1978) explains how the chronic scarcity of funding, tools and institutional support produces risk-averse, domestically-oriented professional behaviour. Third, the import substitution industrialisation literature, revisited in the context of African creative economies by Lall and Pietrobelli (2002), offers a policy-level lens for understanding why design-intensive goods continue to flow inward when domestic capability exists to produce them.

The study asks three specific research questions. First, what proportion of Nigerian design practitioners perceive global export access as a priority future orientation for the sector? Second, what structural barriers — measurable through challenge indicator data — most directly impede export participation? Third, how do practitioners' qualitative policy narratives characterise the relationship between domestic capability and global market engagement?

## 2. Materials and Method

This study employs a mixed-methods design, combining quantitative analysis of structured survey data with qualitative thematic analysis of open-ended practitioner responses. The

dataset is drawn from the same survey instrument used in Morakinyo et al. (2026), administered online between December 2025 and January 2026 across the Nigerian design and applied arts community. The instrument was distributed through professional networks associated with the Society of Industrial Designers of Nigeria, university department contacts and online design communities.

A total of 45 valid responses were collected from practitioners across 18 states: Adamawa, Bauchi, Benue, Borno, Cross River, Delta, Edo, Enugu, FCT, Kaduna, Kogi, Lagos, Nasarawa, Niger, Ogun, Ondo, Plateau and Rivers. Educators and academics constituted the largest respondent group (n = 26, 57.8%), followed by practitioner and professional designers (n = 14, 31.1%), design students (n = 3, 6.7%) and one industry stakeholder (2.2%). Experience profiles were heavily senior: 21 respondents (46.7%) reported more than 15 years of practice and a further 6 (13.3%) reported 11 to 15 years. This seniority profile lends weight to the professional orientation judgements captured by the instrument, as the majority of respondents have accumulated sustained experience within the sector.

Respondents rated six operational challenge dimensions on a five-point Likert scale from 1 (Not a Challenge) to 5 (Critical Challenge). They also selected the single future trend they expected to have the greatest impact on Nigerian design over the next five to ten years, from five options including Export and Global Market Access. Open-ended responses on policy priority were subjected to thematic analysis using the framework of Braun and Clarke (2006). Quantitative data were analysed through mean computation, frequency distributions and cross-tabulation. All responses were anonymised prior to analysis, consistent with the informed consent conditions set out in the survey instrument.

The study's principal limitation is its sample size of 45 respondents, which limits the generalisability of findings to the full population of Nigerian design practitioners. However, the geographic spread across 18 states and the seniority of the respondent profile provide a credible basis for the pattern-level findings reported here. The study is best understood as generating an evidence-anchored baseline from which larger-scale future surveys can be designed.

### 3. Results

#### 3.1 Export Orientation as a Future Trend: The Paradox of Low Salience

Table 1 presents the distribution of respondents' selections of the future trend expected to have the greatest impact on Nigerian industrial design. The results are striking in their asymmetry. Digitalisation and Artificial Intelligence was selected by 28 respondents (62.2%), establishing it as the overwhelmingly dominant perceived future force. Export and Global Market Access was selected by only 3 respondents (6.7%), the lowest-ranked option of the five presented. Growth in Local Manufacturing and Cultural Revival and Afro-centric Design each attracted 5 responses (11.1%). Sustainable and Circular Design was selected by 4 respondents (8.9%).

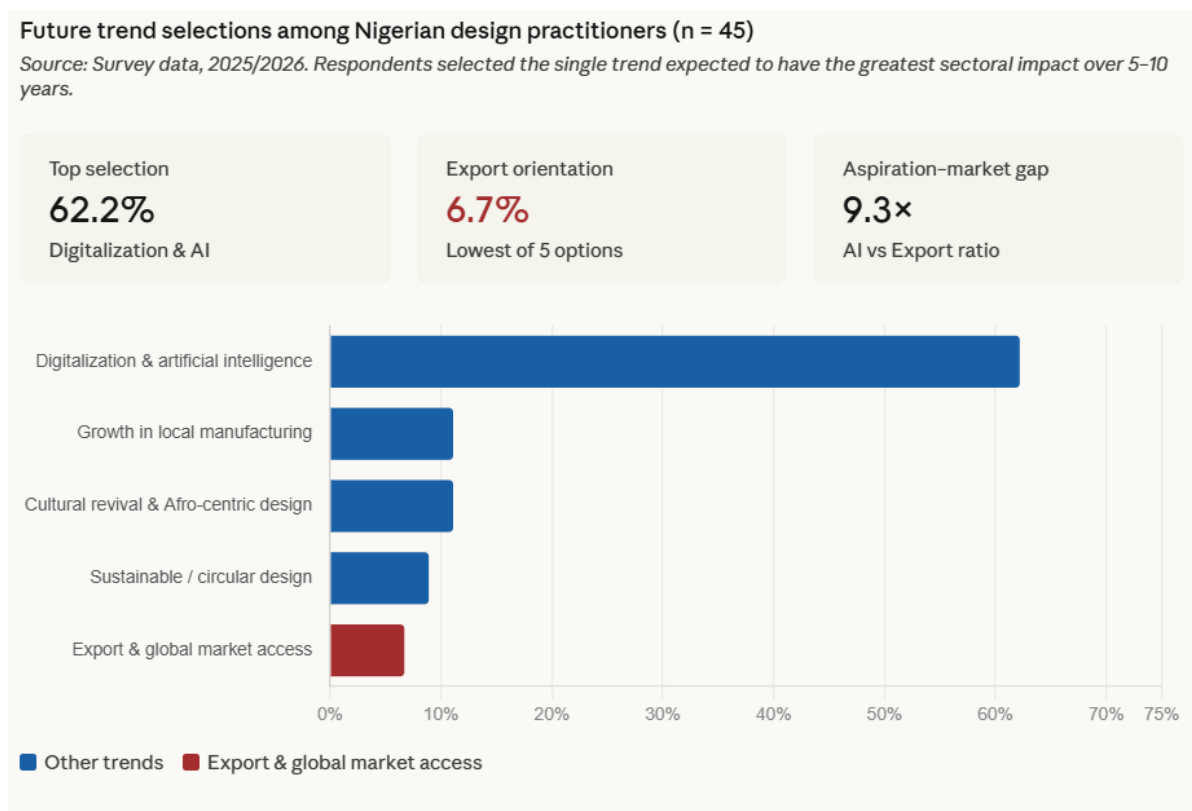
**Table 1: Respondents' Selection of the Most Significant Future Trend for Nigerian Industrial Design (n = 45)**

Trend	Frequency (n)	Percentage (%)
Digitalisation and Artificial Intelligence	28	62.2
Growth in Local Manufacturing	5	11.1
Cultural Revival and Afro-centric Design	5	11.1
Sustainable / Circular Design	4	8.9

Trend	Frequency (n)	Percentage (%)
Export and Global Market Access	3	6.7

*Distribution of respondent selections across five future trend options. Export and Global Market Access registers the lowest salience at 6.7%, despite Nigeria’s documented \$1.5 billion annual import dependency in design-intensive goods categories. Source: Survey data, 2025/2026.*

The comparative weight of each trend option is rendered visually in Figure 1.



*Figure 1: Future Trend Selections — Percentage of Respondents by Category*

*Note: Horizontal bar chart of future trend selections. The marginal standing of export orientation (6.7%) against the commanding share held by digitalisation (62.2%) is unmistakable. The data suggest that export aspiration has been crowded out by more immediate structural preoccupations.*

The low salience of export orientation is doubly striking when considered against Nigeria’s documented import dependency in design-relevant goods categories. The country imports at scale — in furniture, ceramics, textiles and plastics — precisely the categories of goods that its design community is trained to conceptualise and specify (National Bureau of Statistics, 2023). The data suggest not that practitioners are indifferent to this paradox, but that they do not perceive export engagement as a proximate or achievable response to their circumstances. Export aspiration, in other words, has been crowded out by more immediate structural preoccupations.

### 3.2 Challenge Indicators and Export-Constraining Factors

Table 2 presents mean scores for the six operational challenge indicators. Access to modern tools and technology returned the highest mean (3.31), followed by access to funding and

grants (3.24) and government policy and support (3.13). All three exceeded the scale midpoint of 3.0, placing them in the moderate-to-critical challenge range. These three indicators are precisely those that export readiness theory identifies as binding constraints on creative sector export capacity: without production-grade equipment, financial resources and a supportive policy environment, design practitioners cannot reach the quality and volume thresholds required for sustained export participation (Potts and Cunningham, 2008; Lall and Pietrobelli, 2002).

*Table 2: Mean Scores for Operational Challenge Indicators Across the Design Sector (n = 45)*

<b>Challenge Indicator</b>	<b>Mean Score (1–5)</b>	<b>Classification</b>
Access to modern tools and technology	3.31	Critical
Access to funding and grants	3.24	Critical
Government policy and support	3.13	Moderate-Critical
Access to sustainable / local materials	2.82	Moderate
Client / public appreciation of design value	2.78	Moderate
Quality of formal design education	2.73	Moderate

*Mean severity ratings on a 5-point Likert scale. The three highest-rated barriers — tool access, funding and policy — are precisely those identified in the export readiness literature as binding constraints on creative sector internationalisation. Source: Survey data, 2025/2026.*

The relatively lower mean for quality of formal design education (2.73) is notable. It does not indicate that education is unproblematic; rather, it suggests that practitioners rank the material and institutional constraints above the pedagogical ones. This reading is consistent with the infrastructure deprivation findings of Morakinyo et al. (2026), which document that no respondent across 18 states rated their design infrastructure as Excellent and 84.4% rated it as either Poor or Fair.

Figure 2 presents these scores as a radar chart, making visible the uneven topography of constraint across the six dimensions and highlighting the clustering of the three highest-rated barriers around production capacity and institutional support.

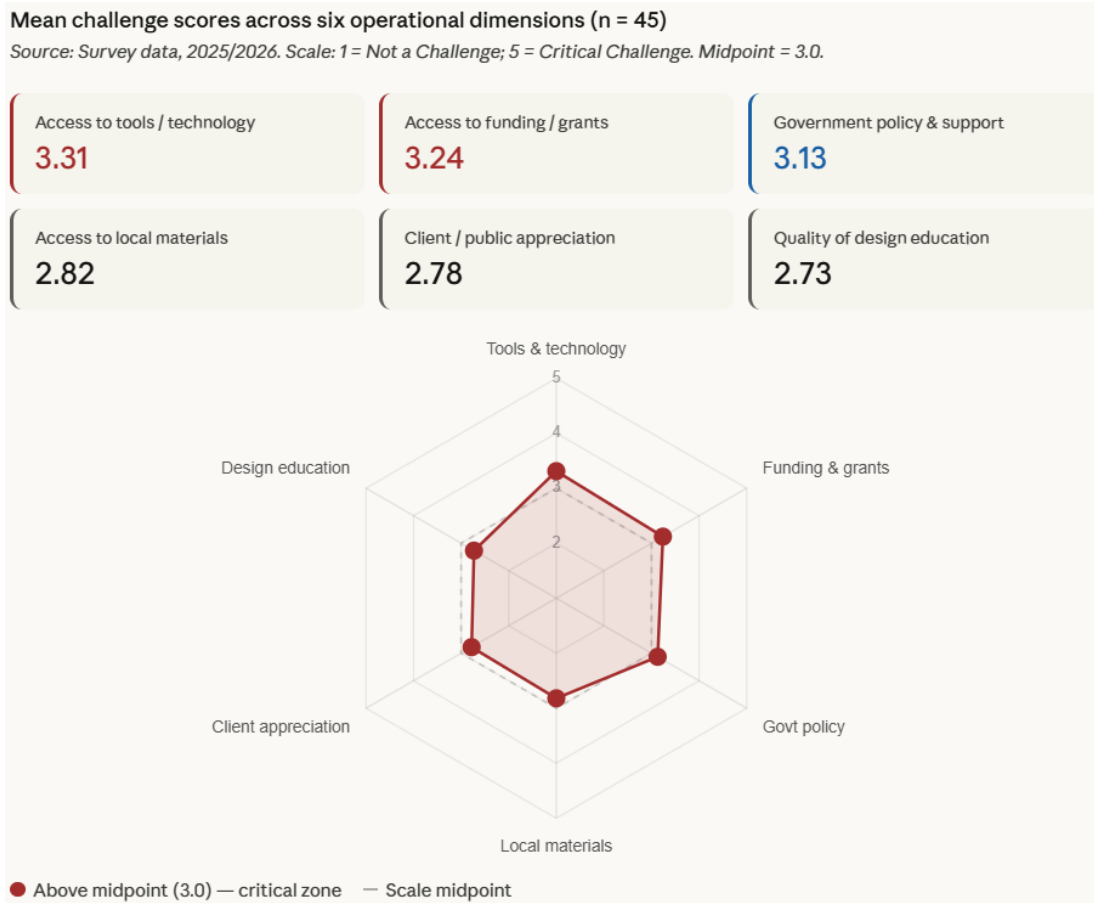


Figure 2: Radar Chart of Mean Challenge Scores Across Six Indicators

Note: Radar chart of mean challenge scores. The polygon foregrounds the relative dominance of tool access, funding and policy constraints. The three highest-rated axes cluster at the production-capacity and institutional-support end of the chart, confirming that export disengagement is materially rather than motivationally determined.

### 3.3 Sustainability Integration and Export-Readiness

Table 3 presents the cross-tabulation of sustainability integration levels with respondents' export trend selection. Of the three respondents who identified Export and Global Market Access as their priority future trend, two reported being somewhat integrated with sustainable practices and one reported no integration. No respondent who described sustainability as a core principle of their practice selected export as their primary future orientation.

Table 3: Sustainability Integration Levels Cross-Tabulated with Export Trend Selection (n = 45)

Sustainability Integration Level	N	%	Chose Export as Top Trend
Not integrated	14	31.1	1 (7.1%)
Somewhat integrated*	24	53.3	2 (8.3%)
Fully integrated	3	6.7	0 (0.0%)
Core principle of practice	4	8.9	0 (0.0%)

\* Note: The 'Somewhat integrated' category in this instrument aggregates two finer-grained levels used in companion papers (Morakinyo et al., 2026; Umukoro et al., 2026), where respondents were asked to distinguish between 'Minimally integrated' and 'Somewhat integrated.' The combined figure of 53.3% in this table is consistent with the 84.4% who report sustainability as absent or partial across the companion dataset when 'Not integrated' (31.1%) is included. Source: Survey data, 2025/2026.

This finding carries an important implication. Global design markets — particularly in Europe, North America and East Asia — increasingly impose sustainability criteria as conditions of market access, through regulatory requirements, buyer specifications and consumer expectations (European Commission, 2022). A Nigerian design sector in which 31.1% of respondents report no sustainability integration and only 15.6% treat it as a fully embedded or core commitment is structurally unprepared to meet the entry conditions of the export markets it is not, in any case, oriented towards. The twin deficits of export aspiration and sustainability practice are mutually reinforcing.

The distribution of sustainability integration levels across respondent role categories is illustrated in Figure 3, which reveals that disengagement from sustainable practice is concentrated among educators and practitioners rather than students — the very groups whose institutional influence shapes curriculum and studio culture.

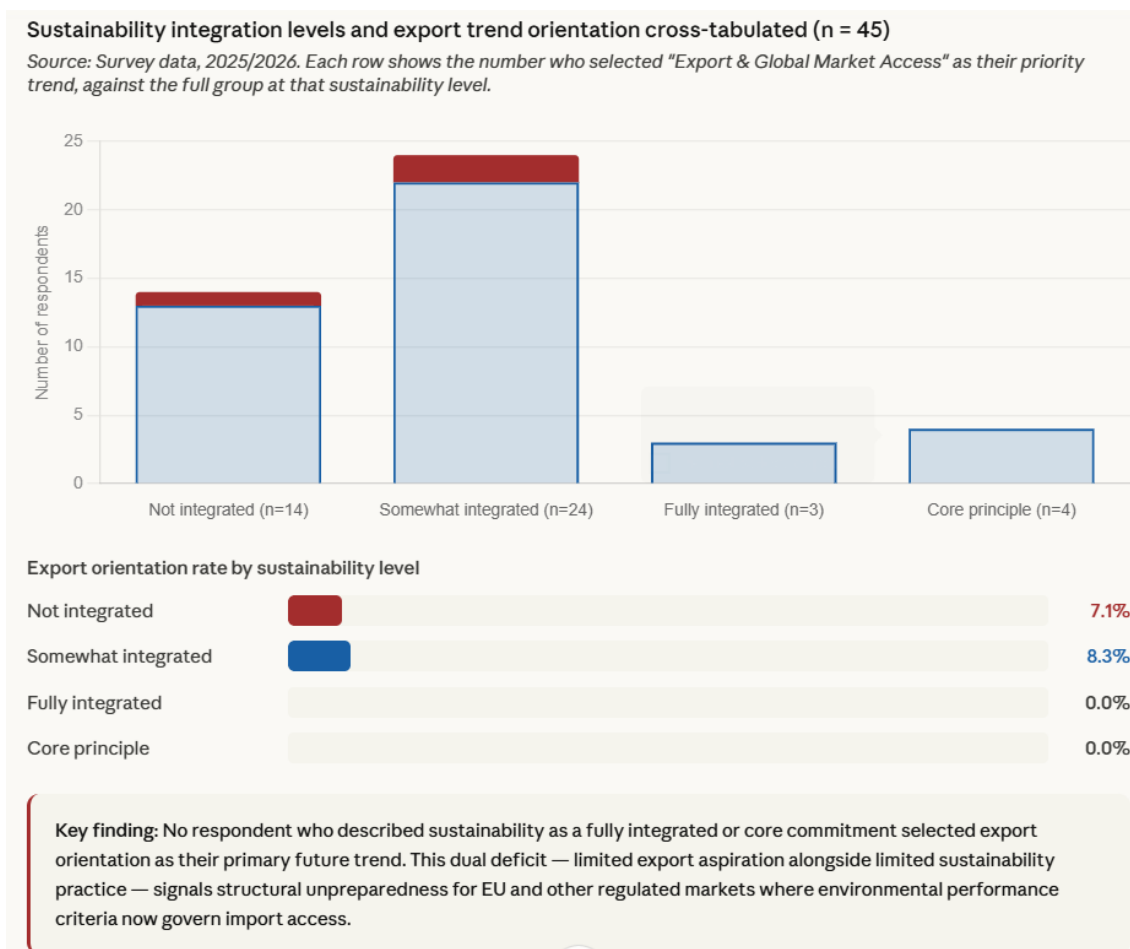


Figure 3: Distribution of Sustainability Integration Levels by Respondent Role Category

Note: Stacked bar chart showing the distribution of sustainability integration levels by role. Disengagement from sustainable practice is concentrated among educators and practitioners — the groups with the greatest

*institutional influence over curriculum and studio culture. Students show proportionally higher integration, suggesting generational awareness that has not yet been institutionalised.*

### **3.4 Qualitative Dimensions: What Practitioners Say**

Open-ended policy responses yielded illuminating practitioner-generated accounts of the barriers separating Nigerian design from global market participation. Four thematic clusters emerged from the analysis using the framework of Braun and Clarke (2006).

The first and most prominent theme was the inadequacy of physical infrastructure and basic production amenities. One practitioner from Edo State stated that the sector requires “complete setup with basic amenities,” a formulation whose very plainness encapsulates the scale of deprivation. A respondent from Rivers State called for “equipping the studios with computers and other modern facilities” as the single most impactful change. These observations confirm that the gap between Nigerian design and global markets begins not in marketing or trade policy but in the material conditions of production.

The second theme was the demand for government recognition and policy engagement. Multiple respondents, across states and role categories, identified the absence of formal government recognition of industrial design as a profession as a fundamental obstacle. One Edo-based practitioner called for “government recognition, support and funding of the profession and discipline.” A respondent from Plateau State drew an analogy with professional regulation in law and medicine, arguing that no practitioner should be permitted to operate without certified qualification. Professional regulation, in this reading, is understood not merely as a gatekeeping mechanism but as a quality assurance framework — the kind that export market buyers require.

The third theme concerned curriculum misalignment. Respondents from Adamawa, FCT and Ondo consistently described curricula as insufficiently responsive to current trends, digital competencies and market realities. One Ondo-based educator called for a complete review of curricula “from primary school to tertiary institutions, to embrace practical-based educational learning, rather than emphasis on theoretical knowledge.” The reference to primary school indicates an awareness that design orientation must begin far earlier than university entry to produce practitioners capable of competing internationally.

The fourth theme — the most directly export-relevant — was export promotion and raw material processing. A Bauchi respondent offered the most succinct formulation: “Export promotion. This will stimulate best practices.” A Kaduna practitioner called for “raw material processing and beneficiation to be accessible for artists, designers and industrialists,” identifying the upstream supply chain as a binding constraint on downstream export capacity. These responses indicate that the minority of practitioners who do hold export awareness understand the problem systemically — from raw material access through production capacity to market promotion.

## **4. Discussion**

The finding that only 6.7% of respondents identified export and global market access as their priority future orientation demands careful interpretation. It would be premature — and unfair — to characterise Nigerian design practitioners as lacking ambition or global awareness. The data suggest, rather, a rational response to structural conditions. When access to tools, funding and policy support are all rated as moderate-to-critical challenges, it is rational to orient professional energies towards the immediate domestic context, where at least some demand exists, rather than towards international markets that impose additional entry requirements. Export disengagement is not a preference; it is the predictable outcome of resource dependency (Pfeffer and Salancik, 1978).

The dominance of digitalisation and AI as the perceived future force (62.2%) deserves scrutiny in this context. It is not inconsistent with export orientation — digital tools are, after all, central to contemporary design export practice, particularly in product design, fashion, ceramics and digital fabrication-enabled manufacturing. But as Morakinyo et al. (2026) establish, access to digital fabrication tools is reported by only 13.3% of respondents in the same dataset. The aspiration for digitalisation is real; the physical and financial conditions for it are largely absent. This aspiration-infrastructure gap means that even the perceived transformative force most associated with global competitiveness remains, for most practitioners, a cognitive orientation rather than an operational reality.

The import dependence figure of \$1.5 billion annually (National Bureau of Statistics, 2023) provides the economic context for understanding what is at stake. Nigeria is, in effect, exporting purchasing power to foreign design and manufacturing sectors while its own design profession operates at below its productive potential. The import substitution industrialisation literature, updated for the creative economy context by Lall and Pietrobelli (2002), argues that this pattern is not inevitable. Countries that have successfully converted design capability into export performance — India’s handicraft and textile sectors, Ghana’s Kente and contemporary fashion industry and South Africa’s design and craft export programmes — have done so through deliberate state support for production infrastructure, quality standards and market access facilitation (British Council, 2020; Nwankwo, 2018).

The sustainability-export cross-tabulation (Table 3) points to a further dimension of the problem. Global buyers, particularly in the European Union following the implementation of the European Green Deal and the Ecodesign for Sustainable Products Regulation, are increasingly imposing environmental performance criteria on imported goods (European Commission, 2022). For Nigerian design exporters to participate in these markets, they must not only meet quality and delivery standards but also demonstrate lifecycle thinking, material traceability and waste reduction commitments. A sector in which 31.1% of respondents report no sustainability integration and the majority describe it as only somewhat present is not positioned to meet these criteria in the near term.

The qualitative data add texture to the quantitative picture. Practitioners who articulate export awareness are not doing so in the abstract; they connect it to specific upstream requirements — raw material processing, professional regulation and curriculum reform. This systemic understanding is significant. It suggests that the policy knowledge required to design an effective Nigerian design export strategy is not absent from the practitioner community; it is simply unmoored from any institutional mechanism that might translate it into action. The recurring demand for government recognition, industry-academia collaboration and infrastructure investment across diverse respondent profiles points to a convergent practitioner analysis that awaits a willing policy interlocutor.

The comparison with the African tech hub literature is instructive. Friederici (2019) observes that African tech hubs have been systematically overpromised by donors and governments while remaining structurally disconnected from the broader economic and infrastructural conditions that determine enterprise success. A similar dynamic operates in Nigerian design: the occasional government creative industry initiative, the sporadic design competition and the periodic international design week invitation — these are the tech hub equivalents of a sector that lacks the sustained, system-level investment that export performance requires. High-visibility events cannot substitute for workshop equipment, fabrication capacity and trade finance.

## **5. Summary of Findings**

This study produces six principal findings. First, export and global market access registers as the lowest-priority future orientation among Nigerian design practitioners, selected by only

6.7% of respondents as their primary anticipated future trend. Second, the barriers most directly implicated in this disengagement — tool access (mean 3.31), funding (mean 3.24) and government policy (mean 3.13) — are precisely those identified in the export readiness literature as binding constraints on creative sector internationalisation.

Third, 84.4% of respondents rate their regional design infrastructure as Poor or Fair, a condition that is structurally incompatible with the production quality and volume requirements of sustained export participation (Morakinyo et al., 2026). Fourth, sustainability integration is partial or absent for 84.4% of respondents, rendering the sector unprepared for the environmental performance criteria now imposed by major global import markets. Fifth, the minority of practitioners who do articulate export awareness demonstrate a systemic understanding that connects raw material processing, production infrastructure, professional regulation and market promotion. Sixth, Nigeria imports at least \$1.5 billion annually in design-intensive goods categories — furniture, ceramics, textiles and plastics — that its trained design community could, under appropriate structural conditions, produce.

## 6. Conclusion

The question posed in this paper’s title is deliberately provocative. “Export or Die” is not a counsel of despair but an analytical challenge: why does a nation with substantial, formally trained design capability remain absent from the global markets it could serve, while spending billions of dollars importing the goods its designers are qualified to create? The answer emerging from the data is structural rather than attitudinal. Nigerian designers are not indifferent to global markets; they are operating in conditions — of infrastructure deprivation, funding scarcity, policy neglect and curricular misalignment — that make export engagement a rational impossibility rather than a missed opportunity.

The companion paper (Morakinyo et al., 2026) establishes that the physical substrate of Nigerian design practice is, across 18 states, systematically inadequate. The present paper establishes that this material inadequacy translates directly into export disengagement. The workshop and the world market are separated, but they are separated by the same structural failures: insufficient investment, absent policy and an educational system that has not yet oriented itself towards the twin imperatives of quality production and global competitiveness. Addressing these failures is not an optional upgrade for Nigerian design; it is the precondition of the sector’s survival as a substantive contributor to the national economy.

## 7. Limitations

This study is limited by its sample size of 45 respondents and the voluntary nature of survey participation, which may introduce self-selection effects. South-East and South-South geopolitical zones are underrepresented relative to their share of Nigerian design programmes. The survey instrument did not incorporate firm-level case studies or export transaction data, which would have strengthened the economic analysis. Policymakers and export promotion officials were not directly surveyed, leaving the institutional perspective on design export barriers unrepresented. Future research should extend the geographic coverage, incorporate firm-level case studies of Nigerian design exporters and conduct comparative analysis with design sectors in Ghana and South Africa that have achieved measurable export growth.

## 8. Recommendations

The following recommendations are addressed to federal and state policymakers, university administrators, professional bodies and the practitioner community.

**Design Export Readiness Assessment.** The Federal Ministry of Industry, Trade and Investment should commission and publish a Nigerian Design Export Readiness Assessment, benchmarked against comparable creative economy export strategies in Ghana, South Africa

and India. This assessment should quantify the import substitution potential of the design sector and set measurable five-year export targets for design-intensive goods categories.

**Dedicated Creative Goods Export Desk.** The Nigerian Export Promotion Council should establish a dedicated Creative Goods Export Desk, providing trade finance facilitation, market intelligence and international buyer matchmaking services specifically tailored to design practitioners and small design enterprises. The existing framework, which treats design goods as a subcategory of general non-oil exports, is insufficiently specific to generate sectoral impact.

**Professional Regulation of Industrial Design.** Professional regulation of industrial design practice should be formalised through an Act of the National Assembly, establishing the Society of Industrial Designers of Nigeria as a statutory regulatory body with authority to set professional standards, certify practitioners and enforce quality benchmarks. Professional certification is a prerequisite for the quality assurance credentials that export buyers require.

**Export Market Orientation in Curricula.** Universities offering programmes in Industrial Design and Fine and Applied Arts should integrate export market orientation into design curricula, including modules on international intellectual property, global quality standards, sustainable product certification and e-commerce platform deployment. Practical engagement with export markets through final-year live briefs with international buyers should be institutionalised as a curriculum requirement.

**Sustainability as a Structural Requirement.** Sustainability integration must be elevated from an elective orientation to a structural component of design education and professional practice, in recognition of the environmental criteria now governing market access in the European Union and other major import destinations. This requires dedicated sustainable materials laboratories, lifecycle assessment training and integration of circular economy principles within studio pedagogy.

## 9. Ethical Considerations

This study was conducted in accordance with established ethical principles for research involving human participants. Participation was entirely voluntary and withdrawal was permitted at any stage without consequence. An informed consent statement was presented at the commencement of the survey, confirming the anonymous nature of data collection, the academic purpose of the study, and the storage arrangements for any personally identifying information optionally provided. Contact details volunteered for follow-up were maintained separately from the analytical dataset on a password-protected platform and did not influence any reported finding. The study did not involve vulnerable populations, clinical intervention, or deception. The participants were told that their information would be kept confidential and would not be released to anybody or third party. Ethical oversight was conducted in accordance with the research governance policies of the team of authors' host institutions. No external sponsor, funder, or third party had access to individual response data at any stage of the research.

## 10. Acknowledgements

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## 11. Use of Artificial Intelligence

Claude (Anthropic, claude-sonnet-4-6) was used to assist with part of manuscript drafting, structural coherence, readability and language editing during the preparation of this manuscript. In accordance with JCP guidelines, the authors disclose this use in the interest of transparency and research integrity.

All content generated or refined with AI assistance was carefully reviewed, verified and revised by the authors. No AI output was accepted uncritically. The survey design, data collection, quantitative analysis, and all interpretive conclusions are the original work of the authors, conducted independently using Microsoft Excel and JASP (Version 0.18.1). Claude was not used at any stage of data generation or statistical analysis.

No AI-generated text has been cited as a source. All claims are supported by human-authored, peer-reviewed, or otherwise verifiable sources. The authors bear full responsibility for the accuracy, completeness, originality, and integrity of the final manuscript, and are satisfied that no factual errors.

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