Mapping the Cultural Industries in South Africa

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MEASURING & VALUING SOUTH AFRICA'S CULTURAL & CREATIVE ECONOMY
What are CCI mapping studies?

- Purpose: Varies widely, sometimes focusing on a whole country, or more narrowly on a specific cultural domain or sub-sector of the domain.
- Most commonly tracked indicators include:
  - Number and geographical distribution of firms in the industry;
  - Firm characteristics by sub-group including industry structure (cluster analysis), legal organisation and concentration;
  - Contributions to the economy (production, productivity or value added; contribution to tax);
  - Employment (direct & indirect);
  - Trade (exports and imports)
Defining the CCIs: UNESCO classifications
Mapping study Methods & Data

Survey Approach (Primary data collection)

- Advantages
  - Can focus specifically on cultural sector (as defined by study)
  - More up-to-date
  - Insights from those in the sector itself

- Disadvantages
  - Not audited & survey data less reliable (low participation rate)
  - Based on a sample, not all firms
  - Costly
  - International comparisons difficult
  - Does not capture cultural workers outside the cultural sector.

National-Level Data (Secondary data extraction)

- Advantages
  - Audited (increased reliability)
  - Collected at regular time intervals
  - Cost effective

- Disadvantages
  - Categories used sometime too broad to accurately identify cultural sector
  - Time lags
  - Can’t capture informal sector

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Example 1: Sarah Baartman District Mapping Study (Drummond & Snowball, 2018)

• Goals of the research
  • To identify the kinds of CCIs in the District so that more targeted funding & policy could be developed
  • To explore the link between socio-economic welfare of population and the presence of the CCIs.

• Data collection techniques:
  • Secondary Sources: 2014 & 2016 studies; Internet searches; Tourism brochures; virtual searches
  • Fieldwork: Field trips to 31 of the 35 SBD towns
  • Construction of a socio-economic welfare index from Census data for each municipality
The Cultural and Creative Industries related to the Socio-Economic Status Index in the Sarah Baartman District
Example 2: Cultural employment in SA (Hadisi & Snowball, 2018)

- Used to answer questions about the size of cultural employment, demographics, earnings, and spatial distribution.
Cultural employment in SA: Are there clusters?

<table>
<thead>
<tr>
<th>Province</th>
<th>Cultural Employment (%)</th>
<th>Number Cultural of Jobs</th>
<th>Non-Cultural Employment (%)</th>
<th>Total Employment (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gauteng</td>
<td>36.99%</td>
<td>146 729</td>
<td>31.50%</td>
<td>31.64%</td>
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<tr>
<td>Western Cape</td>
<td>15.05%</td>
<td>59 699</td>
<td>14.63%</td>
<td>14.64%</td>
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<tr>
<td>Mpumalanga</td>
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<td>36 226</td>
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<td>7.51%</td>
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<tr>
<td>KZN</td>
<td>15.52%</td>
<td>61 564</td>
<td>16.23%</td>
<td>16.22%</td>
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<tr>
<td>Limpopo</td>
<td>7.83%</td>
<td>31 059</td>
<td>8.25%</td>
<td>8.24%</td>
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<tr>
<td>Free State</td>
<td>4.54%</td>
<td>18 009</td>
<td>5.13%</td>
<td>5.12%</td>
</tr>
<tr>
<td>North West</td>
<td>4.91%</td>
<td>19 477</td>
<td>5.97%</td>
<td>5.94%</td>
</tr>
<tr>
<td>Eastern Cape</td>
<td>6.74%</td>
<td>26 736</td>
<td>8.79%</td>
<td>8.74%</td>
</tr>
<tr>
<td>Northern Cape</td>
<td>0.79%</td>
<td>3 134</td>
<td>1.97%</td>
<td>1.94%</td>
</tr>
</tbody>
</table>
Domain Specific CCI Employment

Provincial Location Quotients for Visual Arts and Crafts

<table>
<thead>
<tr>
<th>Province</th>
<th>Percentage of all cultural employment</th>
<th>Percentage of Domain C cultural employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limpopo</td>
<td>7.83%</td>
<td>12.48%</td>
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<tr>
<td>KZN</td>
<td>15.52%</td>
<td>20.11%</td>
</tr>
<tr>
<td>Eastern Cape</td>
<td>6.74%</td>
<td>8.24%</td>
</tr>
<tr>
<td>Mpumalanga</td>
<td>7.02%</td>
<td>7.88%</td>
</tr>
<tr>
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<tr>
<td>Western Cape</td>
<td>15.05%</td>
<td>12.79%</td>
</tr>
<tr>
<td>Gauteng</td>
<td>36.99%</td>
<td>28.18%</td>
</tr>
</tbody>
</table>
Example 3: Mapping publically funded projects (Van der Linde, Jooste & Snowball, 2018)
Funding, CCI clusters & cities

MGE funded events in Johannesburg and Ekhurhuleni

Heat Map of CCI clusters and MGE funded events
What can mapping studies be used for?

• Greater visibility of the CCI sector
• Benchmark and track progress and emerging developments
• Identify existing areas of comparative advantage or specialization (networks & clusters)
• To explore relationships between CCIs and other socio-economic variables (role of cultural and creative sector in economic and social development)
• Identify areas of potential growth and development by government departments and policy-makers and to shape strategic interventions
THANK YOU!

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