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**MEASURING & VALUING SOUTH AFRICA'S
CULTURAL & CREATIVE ECONOMY**



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Cultural Employment in South Africa

Serge Hadisi & Jen Snowball



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Importance of Cultural Sector Employment



- **World-Wide CCI mapping study (2015):** 1% of all employment (29.5m people)
- **East Africa CCI Bill (2015):** “One of the fastest growing sectors in the global economy”
- **CCIs in Nigeria (2009):** “It is estimated that millions of Nigerians are engaged in some form of creative work that, when organised, could boost the Creative Economy”
- **National policies being developed in Senegal:** “To develop institutions and train cultural sector workers”
- **South African revised White Paper:** “This policy positions the sector to creatively respond to globalisation, environmental challenges, job creation and sustainable employment...”

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International Studies



- Employment in CCIs using the British Labour Survey: 1.9 million people working in creative occupations in the UK, which made up 6.1% of total jobs (Department for Culture, Media and Sport, 2015).
- Originally the CCIs were generally seen as “open” to all, with successful participant based on talent. (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O'Brien et al., 2016).
- BUT, even in developed countries, people from working class backgrounds are under-represented. There are some sub-sectors which are more open than others. (e.g., craft sector and publishing and music). Why?
- One of the reasons why CCIs not as “open and meritocratic” as expected is their method of production.

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Attributes of CCI employment



1. **Mostly short-term** contracts in CCIs sectors;
2. **Regional concentration**, particularly in large cities.
3. **Requires specific skills** for a specific project, in a short time-frames, when project is over, the team is disbanded (e.g., Film sector);
4. **CCI jobs are volatile**, where the demand is volatile and uncertain, short term employment is a way of managing risk. Employing people in permanent positions would bankrupt firms if too few projects come in;
5. **Social networks & social capital are important** Team made up of artists already known each other, or who have been recommended by someone know to the team;

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Research in South Africa



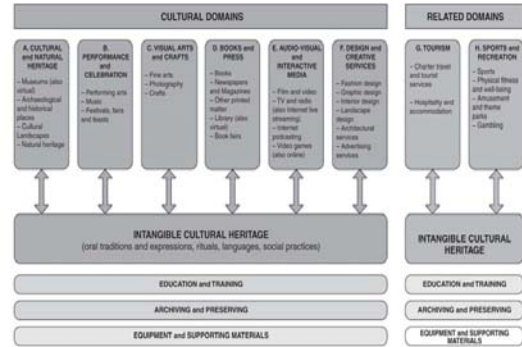
- To date, there have been 3 studies: 1 national and 2 regional (WP and Gauteng) on cultural employment.
- Challenges:
 - Based on survey data where the “population” is not known, so uncertainty about the representativity of the sample;
 - Expensive surveys are not conducted at regular intervals, so comparisons across time not possible.
- **This study:**
 - Part of a larger CCI mapping study (SACO, 2018)
 - Uses audited Statistics South Africa data based on large samples representative at national and provincial levels;
 - Annual data allows comparisons over time.

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Research Framework



- Defining cultural occupations in the Quarterly Labour Force Survey**
 - Adapted international system used by UNESCO Survey of Cultural Employment Statistics Manual (2015) to allow for local context and international comparison.
 - Process of matching UNESCO employment classification codes (ISCO-08) and classification codes (ISIC-REV.4) to the South African Standard Classification of Occupation (SASCO) codes and Standard Industrial Classification of all economic activities in South Africa (SIC) 5th edition/1993 used in QLFS to identify cultural occupations and cultural industries. (Hadisi and Snowball, 2016a).
 - Not all the categories match or are grouped in the same way, but there is sufficient overlap between the two systems to guide the SA definitions, and weightings are suggested where too little detail is given in the 2009 UNESCO (FCS).



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E.g. of Cultural Employment codes and weightings for occupations and industries



4-digit code	Description Occupations	Weighting	3-digit Code	Description Industries	Weighting
2310.	Technikon, teacher training, technical and other colleges, university and other higher education institutions teaching professionals	2.5%	324.	Publishing	100%
243.	ARCHIVISTS, LIBRARIANS AND RELATED INFORMATION PROFESSIONALS		376.	Manufacture of watches and clocks	15%
2431.	Archivists and curators	100%	392.	Manufacturing n.e.c	40%
2432.	Librarians and related information professionals	100%	613.	Wholesale trade in household goods	50%
244.	SOCIAL SCIENCE AND RELATED PROFESSIONALS		623.	Other retail trade in new goods in specialised stores	40%
2442.	Sociologists, anthropologists and related professionals	100%	624.	Retail trade in second – hand goods in stores	5%
2444.	Philologists, translators and interpreters	100%	853.	Renting of personal and households goods	50%
245.	WRITERS AND CREATIVE OR PERFORMING ARTISTS		862.	Software consultancy and supply	5%
2451.	Authors, journalists and other writers	100%	864.	Data base activities	50%
2452.	Sculptors, painters and related artists	100%	882.	Architectural, engineering and other technical activities	50%
2453.	Composers, musicians and singers	100%	883.	Advertising	5%
2454.	Choreographers and dancers	100%	889.	Business activities n.e.c	16.6%
2455.	Film, stage and related actors and directors	100%	920.	Education services	0.005%
			961.	Motion picture, radio, television and other entertainment activities	100%
			962.	News Agency Activities	100%
			963.	Library, archives, museums and other cultural activities	100%

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Research Framework

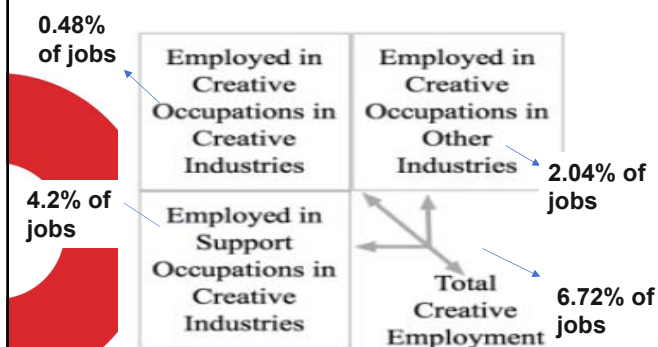


Composition of the QLFS data used in the study:

- Labour Market Dynamics Survey/QLFS run by Statistics South Africa in 9th year: Data available from 2008- 2015.
- Panel data tracking individuals in a sample representative of the population at national and provincial levels
- The survey interviewed Individuals in Households who are in the labour force employed and, specifically for this study being in cultural jobs.
- Survey weights for the data collected were applied to the sampled households to ensure the correct responses of the entire national population.
- Roughly 33 000 dwellings/households constituted the survey sample size per quarter (population aged 15 years +).
- In 2015, the master sample was updated and now based on the Census 2011 results.

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Linking the Cultural Economy to Cultural Workers



The Cultural Trident

- Cultural Workers working in the cultural sector made up 0.48% of jobs.
- Cultural workers working outside of the cultural sector made up 2.04% of jobs.
- Non-cultural workers working in the cultural sector made up 4.2% of jobs.
- The total Creative employment in the economy is about 6.72% of jobs.
- Note:** lack of industry data at 4-digit level, the cultural industries figure should be treated as *an estimate*, rather than an exact number.

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Cultural trident as percentage of total employment



Cultural Trident as Percentages of total employment	% of total employment	Number of jobs
A. Cultural occupations in Cultural Industries	0.48%	75 209
B. Cultural occupations in Non-Cultural Industries	2.04%	321 464
C. Non-Cultural occupations in Cultural Industries	4.20%	661 340
Cultural occupations (A + B)	2.52%	396 673
Cultural industries employment (A + C)	4.68%	736 550
The Creative Economy (A + B + C)	6.72%	1.06m

- CCI occupations: 2.52% of jobs in South Africa in both cultural industries and non-cultural industries (e.g., actor working in a performing arts company and a designer working in a car manufacturing firm).
- Cultural industries employment made up 4.68% of jobs (cultural & support occupations).
- If one includes all three parts of the creative trident, the cultural economy makes up 6.72% of all jobs in the country.

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How big is cultural employment in SA?



Employment by industry in South Africa, 2015

Country	Percentage of persons employed in creative economy (A + B + C)	Year (if not 2015)
Mexico	9.95	
Russian Federation	7.6	2014
Germany	7.09	
Malta	6.72	
South Africa	6.72	
Chile	5.8	2013
Spain	4.55	
Thailand	4.53	
China	4.16	
Uganda	2.53	2012
Mozambique	1.69	2014

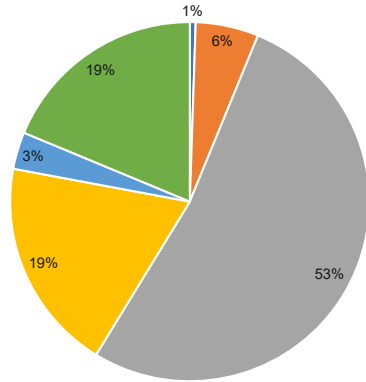
Source: UNESCO International Database

Industry	Percentage of total employment	Number of Jobs (in thousands)
Agriculture	5.59	880
Mining	2.89	455
Manufacturing	11.20	1762
Utilities	0.84	132
Construction	8.93	1405
Trade	20.09	3161
Transport	5.75	905
Finance & Business Services	13.97	2198
Community & Social Services	22.56	3551
Private households	8.18	1288

Source: LMDSA report, 2015. Authors' own percentage calculations

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Cultural Occupations: Domains



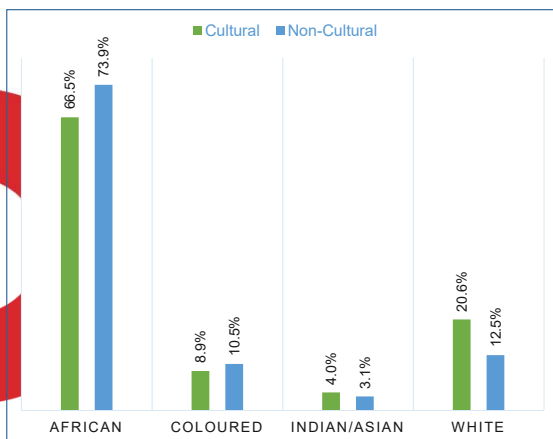
- A. Cultural & Natural Heritage
- B. Performance & Celebration
- C. Visual Arts & Crafts
- D. Books, Information & Press
- E. Audiovisual & Interactive Media
- F. Design & Creative Services

In terms of employment:

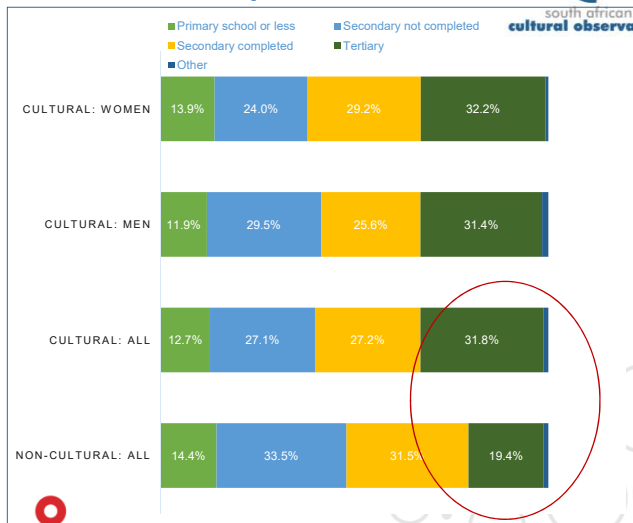
- Visual Arts and Crafts account for 53% of all cultural occupations;
- Books, Information and Press and Design and Creative Services 19% each
- Much smaller contributions from Performance and Celebration (6%), Audio-visual and Interactive Media (3%), and Cultural and Natural Heritage (1%)

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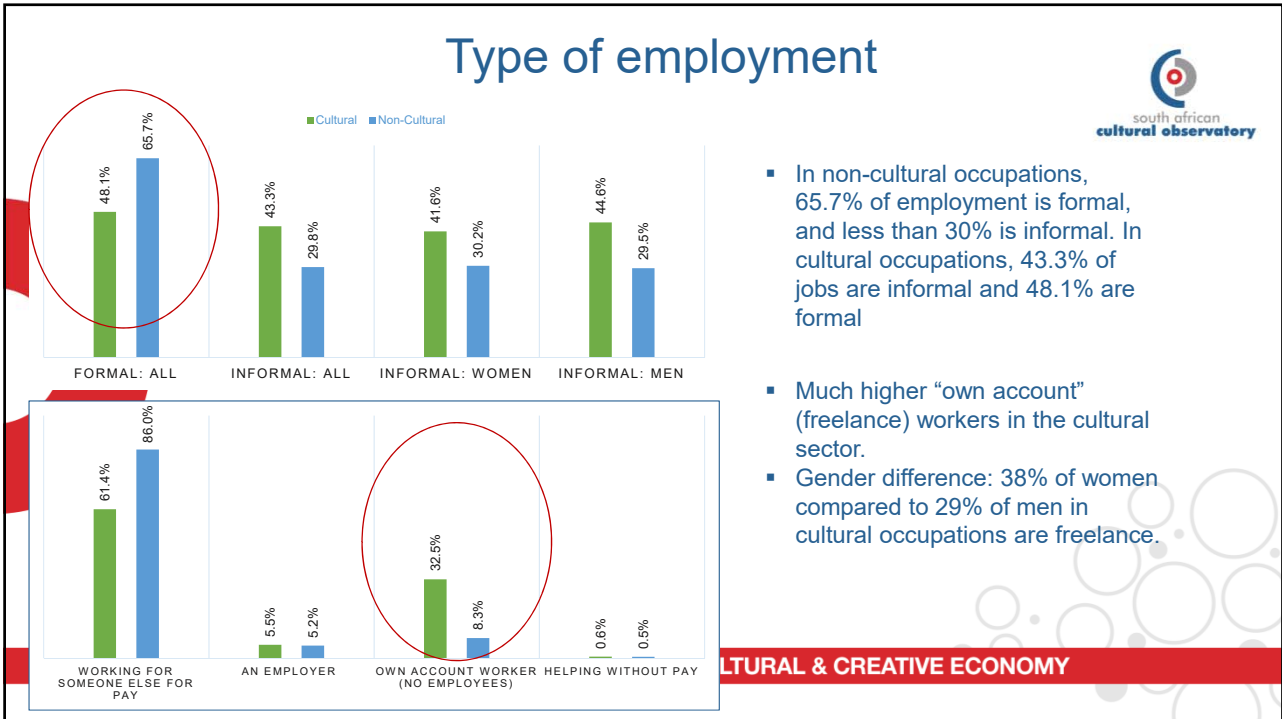
Who works in cultural occupations?



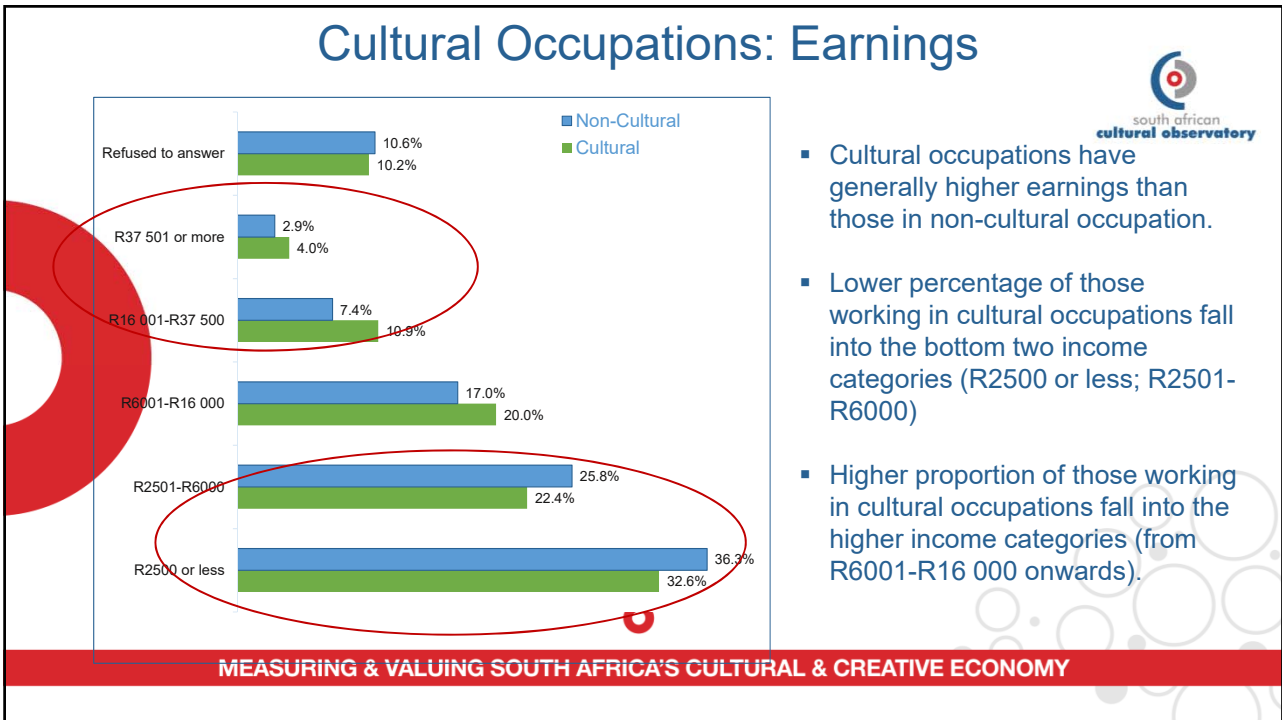
Less representative domains (Audio Visual and Interactive Media; Design & Creative Services) > 43% white (55% and 66% have tertiary education)



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- In non-cultural occupations, 65.7% of employment is formal, and less than 30% is informal. In cultural occupations, 43.3% of jobs are informal and 48.1% are formal
- Much higher “own account” (freelance) workers in the cultural sector.
- Gender difference: 38% of women compared to 29% of men in cultural occupations are freelance.



- Cultural occupations have generally higher earnings than those in non-cultural occupation.
- Lower percentage of those working in cultural occupations fall into the bottom two income categories (R2500 or less; R2501-R6000)
- Higher proportion of those working in cultural occupations fall into the higher income categories (from R6001-R16 000 onwards).

Cultural employment in SA: Are there clusters?



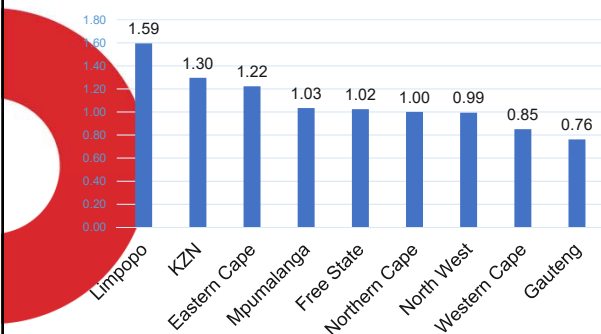
Province	Cultural Employment (%)	Number of Cultural Jobs	Non-Cultural Employment (%)	Total Employment (%)
Gauteng	36.99%	146 729	31.50%	31.64%
Western Cape	15.05%	59 699	14.63%	14.64%
Mpumalanga	7.62%	30 226	7.51%	7.51%
KZN	15.52%	61 564	16.23%	16.22%
Limpopo	7.83%	31 059	8.25%	8.24%
Free State	4.54%	18 009	5.13%	5.12%
North West	4.91%	19 477	5.97%	5.94%
Eastern Cape	6.74%	26 736	8.79%	8.74%
Northern Cape	0.79%	3 134	1.97%	1.94%



Proportion of cultural occupations by Province in South Africa

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Domain Specific CCI Employment

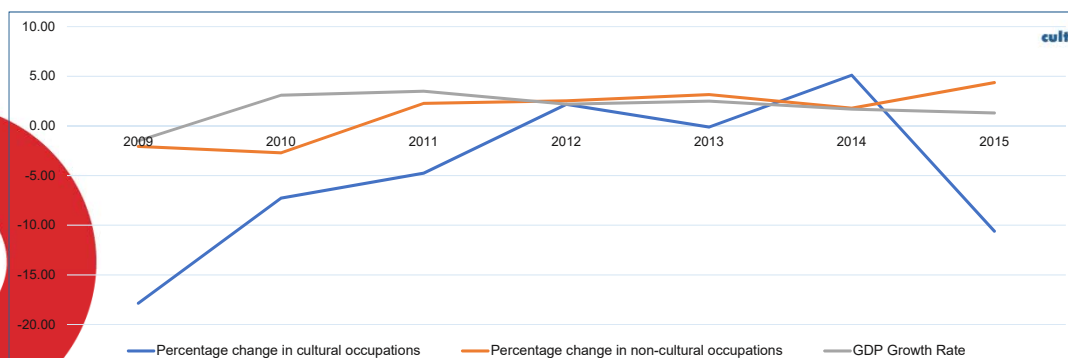


Province	% of all cultural employ.	% Domain C cultural employ.
Limpopo	7.83%	12.48%
KZN	15.52%	20.11%
Eastern Cape	6.74%	8.24%
Mpumalanga	7.62%	7.88%
Free State	4.54%	4.65%
Northern Cape	0.79%	0.79%
North West	4.91%	4.88%
Western Cape	15.05%	12.79%
Gauteng	36.99%	28.18%

Provincial Location Quotients for Visual Arts and Crafts

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Cultural Employment Over Time



Year	2009	2010	2011	2012	2013	2014	2015
Percentage change in cultural occupations	-17.86	-7.28	-4.76	2.17	-0.11	5.11	-10.61
Percentage change in non-cultural occupations	-2.06	-2.71	2.27	2.53	3.15	1.79	4.37
GDP Growth Rate (Percentage change)	-1.5	3.1	3.5	2.2	2.5	1.7	1.3

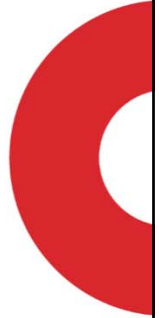
Concluding Remarks

- Cultural employment can be reliably measured using national-level data from Stats SA
- Over time analysis demonstrated that the CCIs are *volatile* and very responsive to changes in the economy.
- Cultural employment contributes significantly to employment in SA and can grow faster than employment in other sectors.
- Cultural workers have higher average earnings and education levels than non-cultural workers.
- Compared to non-cultural employment, cultural employment has more informal sector jobs, and a greater proportion are freelance or contract workers, especially for women.
- In some domains (where tertiary education is required), access to higher education may be constraining faster transformation in the industry.

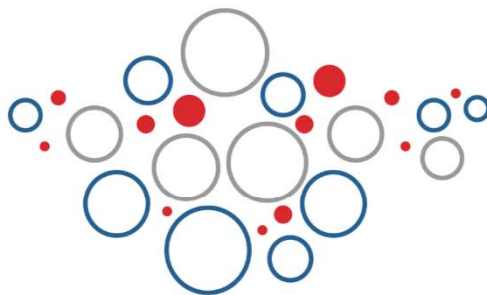
Concluding Remarks



- Including all three parts of the creative trident, the cultural and creative industries in South Africa accounted for an estimated **6.7%** of all jobs in the country.
- As found internationally, cultural workers tend to “cluster” in some provinces, especially those with larger cities, although smaller clusters may be identified individually in more rural provinces.



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THANK YOU!



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