Mapping the Cultural Industries
Methods and the way forward

Jen Snowball

Cultural Observatory
Rhodes University, Professor of Economics
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

- **Core creative arts**: Literature, Music, Visual arts, Performing arts
- **Other core cultural industries**: Film, Museums, galleries, libraries, Photography
- **Related industries**: Advertising, Architectural Design, Fashion
- **Wider cultural industries**: Heritage services, Publishing and print media, Television and radio, Sound recording, Video and computer games

#### CULTURAL AND CREATIVE DOMAIN

<table>
<thead>
<tr>
<th>CULTURAL AND NATURAL HERITAGE</th>
<th>PERFORMANCE AND CELEBRATION</th>
<th>VISUAL ARTS AND CRAFTS</th>
<th>INFORMATION, BOOKS AND PRESS</th>
<th>AUDIO/VISUAL AND INTERACTIVE MEDIA</th>
<th>DESIGN AND CREATIVE SERVICES</th>
<th>TOURISM</th>
<th>SPORTS &amp; RECREATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museum (also virtual)</td>
<td>Performing Arts</td>
<td>Fine Arts</td>
<td>Books</td>
<td>Film &amp; video</td>
<td>Fashion Design</td>
<td>Charter travel &amp; tourist services</td>
<td>Sports</td>
</tr>
<tr>
<td>Archeological and historical places</td>
<td>Music</td>
<td>Photography</td>
<td>Newspapers and magazines</td>
<td>TV &amp; Radio (also internet live streaming)</td>
<td>Graphic Design</td>
<td>Physical fitness &amp; well-being</td>
<td>Physical fitness &amp; well-being</td>
</tr>
<tr>
<td>Cultural landscapes</td>
<td>Festivals and Events</td>
<td>Crafts</td>
<td>Other printed and electronic matter</td>
<td>Internet podcasting</td>
<td>Interior Design</td>
<td>Amusement &amp; theatre parks</td>
<td>Amusement &amp; theatre parks</td>
</tr>
<tr>
<td>Natural Heritage</td>
<td></td>
<td></td>
<td>Library (also virtual)</td>
<td>Video games (also online)</td>
<td>Landscape Design</td>
<td></td>
<td>Gambling</td>
</tr>
</tbody>
</table>

#### TANGIBLE AND INTANGIBLE CULTURAL HERITAGE

(Also oral traditions and experience, rituals, indigenous knowledge and knowledge economy)

Language and social cohesion and nation building
What can mapping studies be used for?

• to give greater visibility to the sector by demonstrating both cultural and economic values generated;
• to benchmark the progress of CCI firms against other firms, to plan ahead in terms of marketing and distribution and to improve collaboration and networking through the identification of strategic clusters;
• to lobby for support by industry organisations or institutions and to provide evidence of their value and economic importance;
• to identify areas of potential growth and development by government departments and policy-makers and to shape strategic interventions;
• to track progress over time and to analyse emerging developments in the sector.
Steps in the Mapping Study Process

- Why do mapping?
  - Who is it for?
- Which policy questions can mapping be used to address?
- How are the creative industries defined?
- Who is in charge?
  - Who does the work?
- Which research approach should be adopted?
- How can the project's findings connect with key audiences and policy agendas?
- How can momentum be maintained?
<table>
<thead>
<tr>
<th>Country</th>
<th>Report</th>
<th>Year</th>
<th>Data collection method used/recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>Arts and Culture Production Satellite Account</td>
<td>2015</td>
<td>Quantitative data from national statistical offices such as Arts and Cultural Production Satellite Account (ACPSA), U.S. Bureau of Economic Analysis, Tourism Satellite Accounts, US Census.</td>
</tr>
<tr>
<td>Republic of Colombia</td>
<td>Guide to Producing Regional Mappings of the Creative Industries</td>
<td>2007</td>
<td>Recommended use of available quantitative secondary information from (i) official national government statistics and (ii) professional associations and previous surveys. Primary information collection only recommended if data from these sources not available/reliable.</td>
</tr>
<tr>
<td>Global</td>
<td>Cultural Times: The First Global Map of Cultural and Creative Industries</td>
<td>2015</td>
<td>Quantitative data from national statistics, market research, existing CCI studies and industry reports, supplemented by interviews with “stakeholders and experts”.</td>
</tr>
<tr>
<td>UK</td>
<td>Mapping the Creative Industries: A Toolkit</td>
<td>2010</td>
<td>Quantitative data from government national and regional statistical offices is recommended. If reliable data is not available, explore non-governmental statistics (trade associations, industry bodies, trade publications, online networks etc.). If these are not available, compilation of primary data should be explored. If this is not feasible (it is very costly), qualitative methods are suggested.</td>
</tr>
<tr>
<td>Argentina</td>
<td>Atlas Cultural de la Argentina.</td>
<td>2014</td>
<td>Quantitative study as part of “Cultural Information Systems” also incorporating Cultural Satellite Accounts. Made use of both primary sources, such as surveys of specific sectors conducted by SInCA (e.g. National Survey of Reading, the National Survey Cultural consumption), as well as national government statistics from the Bureau of National Accounts of the National Institute of Statistics and Census. Supplementary, region-specific data was obtained from other government agencies and business associations.</td>
</tr>
</tbody>
</table>
Mapping study Methodology

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
An example of existing data - Southern Africa: CCI trade growth 2007 - 2011

UNCTAD Data, 2015

- Exports 2007 - 2011
- Imports 2007 - 2011
The Physical Spatial Dimensions: Sector specific – Argentinian Example.
Spatial dimensions: Clusters and Zones in SA

The Department of Arts and Culture (DAC) is one of South Africa’s most vital national departments in that it contributes to social cohesion, and is active in sustaining the country’s heritage. Also, the DAC plays a crucial role in supporting individuals, communities and businesses involved in what is known as the cultural industries sector. This sector continues to contribute to South Africa’s economic development, as it offers employment opportunities for both unskilled and skilled groups.

The Department of Arts and Culture’s National Mapping Study has been implemented in order to quantify the contribution of the cultural industries to the South African economy. A combination of research methodologies have been undertaken in order to compile as comprehensive a database as possible, of entities within the Arts and Culture sector in South Africa. These have been defined in terms of 6 main domains, and mapped in order to allow the Department to get a broader picture of how individuals and organisations in the Arts and Culture sector in South Africa are distributed.
2 Methods:
(1) Constructing a database of CCIs in South Africa (25 000)
(2) Interviewing a sample (2 400)
# National level insights: CCI Employee Characteristics

<table>
<thead>
<tr>
<th>Type</th>
<th>Full Time</th>
<th>Part Time</th>
<th>Contract</th>
<th>Below matric</th>
<th>Matric</th>
<th>Tertiary</th>
<th>Formal/Certified</th>
<th>Informal/Uncertified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age groups</td>
<td></td>
<td></td>
<td></td>
<td>10%</td>
<td>20%</td>
<td>20%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Position</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entry Level (0-2 years)</td>
<td>19%</td>
<td>29%</td>
<td>46%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intermediate (2 - 5 years)</td>
<td>18%</td>
<td>25%</td>
<td>45%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior (&gt; 5 years)</td>
<td>17%</td>
<td>25%</td>
<td>47%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Below matric</td>
<td>25%</td>
<td>32%</td>
<td>23%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Matric</td>
<td>19%</td>
<td>27%</td>
<td>22%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tertiary</td>
<td>18%</td>
<td>25%</td>
<td>22%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informal/Uncertified</td>
<td>34%</td>
<td>23%</td>
<td>18%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formal/Certified</td>
<td>25%</td>
<td>25%</td>
<td>22%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Regional Studies: Gauteng

- Number of Cultural entities
- Contribution to GGP
- Direct Employment & overall employment impact

<table>
<thead>
<tr>
<th></th>
<th>RSA %</th>
<th>Gauteng %*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Race of owner(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black, Coloured, Asian</td>
<td>63</td>
<td>53</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age of owner(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt; 35 yrs</td>
<td>34</td>
<td>36</td>
</tr>
<tr>
<td>35 - 54</td>
<td>58</td>
<td>54</td>
</tr>
<tr>
<td>55 +</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Gender of owner(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Female</td>
<td>49</td>
<td>43</td>
</tr>
<tr>
<td>Entity Size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 5</td>
<td>61</td>
<td>54</td>
</tr>
<tr>
<td>6 – 10</td>
<td>18</td>
<td>22</td>
</tr>
<tr>
<td>11 +</td>
<td>20</td>
<td>24</td>
</tr>
</tbody>
</table>
Sector Studies: Performance & Celebration

Percentage of CCIs in Performance & Celebration by Province

- National
- EC
- Free State
- Gauteng
- KZN
- Limpopo
- Mpumalanga
- Northern Cape
- North West
- Western Cape

- Performance & Celebration (Total)
- Performing arts
- Music
- Festivals & Events
Performance & Celebration Labour Force

- **Employment Type**
  - Full Time
  - Part Time
  - Contract

- **Position**
  - Entry/Junior level (0 – 2 years’ experience)
  - Intermediate (2 – 5 years’ experience)
  - Senior (more than 5 years’ experience)

- **Training**
  - Informal/uncertified training
  - Formal, certified training

**Performing Arts**
- Performing Arts
- Music
- Festivals & Events
The next step: Producing useful data

• Mapping studies are “living” documents that need to be updated and used in ways useful to industry stakeholders.

• SA needs to:
  • Explore existing national-level data: What do we know and what is missing? How reliable are data sources?
  • What are CCI policy objectives and what information (indicators) do we need to give useful data?
  • How can we use the existing data as a starting point to produce micro-level regional and “state of the sector” reports?