



South African Cultural Observatory

Research Report: Cultural Employment in South Africa November 2016 Serge Hadisi and Jen Snowball

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Executive Summary

The Cultural and Creative Industries (CCIs) are attracting increasing attention worldwide as potential drivers of economic growth, innovation and job creation. The latter is particularly important in South Africa, which has very high unemployment rates. The first phase of this research was to adapt the UNESCO guidelines on defining cultural occupations for South Africa, using International Standard Classification of Occupations (ISCO) codes. Following international trends, cultural occupations were defined to include both traditional cultural workers (such as writers, performing artists and sculptors) as well as those in the more commercial creative industries (such as architects and designers). “Cultural employment” includes those working in “cultural occupations”, both in the CCIs and outside of them, but does not include those working in CCIs in non-cultural jobs.

Results show that cultural and creative occupations contribute significantly to employment in South

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Africa, making up 2.93% of total employment in 2014 (443 778 jobs), which is slightly more than mining, and about two thirds of the number of agricultural jobs. Time series analysis

has shown that, while cultural employment can grow faster than non-cultural employment, it is more volatile, being significantly affected by economic downturns.

Compared to non-cultural jobs, more jobs in the cultural sector are in the informal sector, especially for women. There are also significantly more freelance (or “own account”) workers in cultural employment. The percentage of black African, coloured and Indian or Asian people employed in cultural occupations is somewhat lower (81% in 2014) than in non-cultural occupations (89%).

As also found in other studies, cultural workers tend to have higher levels of education and earnings than non-cultural workers, suggesting that this sector has the potential to boost economic growth. However, cultural jobs tend to “cluster” in some provinces, notably those with larger cities.

This report also demonstrates how reliable, national-level data, collected by Statistics South Africa, can be used to provide information on cultural employment.

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1. Introduction: Purpose and Methods

The Cultural and Creative Industries (CCIs) are attracting increasing attention worldwide as potential drivers of economic growth, innovation and job creation. The latter is particularly important in South Africa, which has very high unemployment rates. To date, there have been no studies of employment in the CCIs in South Africa using officially collected, national-level data, although there have been attempts to measure the size of the creative economy using survey data (for example, regional studies such as the Western Cape (2009) and Gauteng (2009) studies, and a national study conducted in 2014). However, these studies have some constraints: (i) since the population of CCIs is not known, there is always a concern that the sample is not representative thus reducing the reliability of the results; and (ii) since the surveys are expensive, they are not conducted at regular intervals and thus do not allow for comparisons over time.

The first phase of this research was to examine the UNESCO definition of cultural occupations and to determine to what extent South African national data collection methods used by Statistics South Africa could be used to match this definition, and possible adaptations needed (for more discussion see Hadisi and Snowball, 2016, *Measuring Cultural Employment in South Africa: A comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Codes*). While acknowledging that cultural occupation in each country are different and need to take context into account, it is also useful to be able to make comparisons and to use best-practice.

Once “cultural occupations” had been defined for South Africa, the second phase of the research was to isolate data on cultural and non-cultural employment. The data presented in this report is from the Stats SA (Statistics South Africa) Labour Market Dynamics South Africa (LMDSA), which is an annual dataset running from 2008 - 2014. The data set is large, consisting of a sample size of around 341 320 households, about 235 000 of which are interviewed per year. Sampling is done extremely carefully and is representative at national, provincial and metro levels. The analysis of data was conducted descriptively, using ratios, graphs and tables, using the statistical software package referred to as “Stata 14”.

2. A Review of the Literature on Cultural and Creative Employment

In 2015, the first world-wide CCIs mapping study was released (CISAC, 2015). Their findings showed that the CCIs employ 29.5 million people, or 1% of the world’s population that is in the labour force.

The newly released East African Community CCI Bill (2015) also recognised the sector as, “one of the fastest growing sectors in the global economy” with the potential to increase GDP and increase employment in both developed and developing countries. An exploratory study of the CCI sector in Nigeria (Agoralumier, 2009) concluded that, “In Nigeria, although statistics are not available, it is estimated that millions of Nigerians are engaged some form of creative that when organized could boost the Creative Economy”. Work on national policies to promote the cultural sector in Senegal was funded under the Millennium Development Goals Achievement Fund (2008 – 2012) to develop institutions and train cultural sector workers in areas such as copyright law, and to market and develop cultural venues and cultural tourism (UNESCO, 2012).

In South Africa, there have been three studies, two regional and one national, that have sought to quantify the economic and employment effect of the CCIs. The Western Cape study (2008) calculated that there were 47 545 people working in the creative sector in the province. However, they note that this is a conservative estimate, since it did not include educators and the cultural tourism sectors. The Gauteng (2009) study found that cultural industries created direct employment for more than 63 000 people in the province, which amounted to 1.9% of the total workforce.

A national mapping study (2014) found that the cultural industries in South Africa employed 177 609 people directly (mid-range estimates). However, they emphasise that creative firms also create upstream and downstream demand for goods and services, so that, overall, the sector creates more than half a million jobs, which is 3.6% of employment in South Africa. This study, like the two regional ones, was done by interviewing a sample of CCI firms, and compiling a database of 23 000 CCI firms in South Africa which was used to estimate the size of the industry.

One of the first studies of employment in the CCIs using official national statistics (as compared to surveys) was done using the 2014 British Labour Force Survey (Department for Culture, Media and Sport, 2015). They found that there are 1.9 million people working in creative occupations in the UK, which made up 6.1% of total jobs. Like some other studies, they found evidence that creative employment tended to “cluster” in some sectors, particularly around large cities. For example, 28.9% of creative jobs were found in London, while only 16.4% of all jobs were based in this region.

A Brazilian study (Kon, 2016) using national data found that the creative sector accounted for 5% of “industry jobs” in the country. This study defined the CCIs quite broadly, including also sports, and information technology, architecture and engineering. Creative workers employed just over a million

people in Brazil in 2010, which amounted to 3.1% of formal employment in the country. However, when household surveys were used to estimate informal employment in the CCIs (defined as self-employed, and workers in companies, but without a formal contract), a further 988 049 workers were identified.

Some researchers (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O'Brien et al., 2016) have noted that, although the cultural and creative industries (CCIs) were originally seen as open to all, with successful participation based on talent, this has not, in fact, been found in most research. For example, previous studies done in the UK and US have shown that workers in the CCIs have actually tended to be from middle class, affluent backgrounds, and are mostly dominated by white people (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O'Brien et al., 2016). These findings have implications for CCI job creation potential, and also for the kinds of arts and culture that are produced.

Based on the 2014 UK survey, O'Brien et al. (2016) rejected the view of the cultural and creative sector as "open and meritocratic". Instead, they find that, in the UK, those from working class backgrounds are under-represented and generally have lower wages than those from privileged classes. However, they also find that there are significant differences between the various CCI sectors: so, for example, the craft sector is much more "open" than sectors like publishing and music.

There are a number of reasons why the CCIs might not be as open and meritocratic as they were first assumed to be, mostly to do with the short-term, contract nature of work in some CCI sectors (Oakley, 2006; Grugulis and Stoyanova, 2012; Grodach and Seman, 2013). For example, in the film sector, teams of people, representing the specific skills required for a specific project, are assembled over fairly short time-frames. When the project is over, the team disbands. Caves (2000) argues that this method of production is an important way to offset the risk associated with creative ventures, where demand is volatile and uncertain. In this situation, firms that employed people on full-time, permanent contracts would go bankrupt if too few projects came in, and would not have the necessary flexibility needed to source people with the specific skills required for particular projects.

However, one of the results of this method of production is that social networks (also referred to as social capital) are of great importance to being employed in the CCIs. Given the short time-frame of most creative projects, teams are often made up of artists already known to each other, or who have been recommended by someone known to the team, or who already have a reputation for good work

in the industry. Grugulis and Stoyanova (2012) and Eikhof and Warhurst (2013) argue that these recruiting practices make sense given the tight production schedules of many cultural and creative projects. However, this makes it very difficult for new artists to break into the industry, and middle class people, who tend to have more social capital, have a better chance of success (Eikhof and Warhurst, 2013; Siebert and Wilson, 2013).

Short-term, project based work also results in unpredictable employment patterns and incomes. Those who can rely on their parents or families to support them during periods when they are not employed are likely to stay in the industry longer, and thus more likely to develop the necessary networks and reputation. Again, people from middle-class backgrounds have the advantage (Eikhof and Warhurst, 2013; Siebert and Wilson, 2013).

Short-term contracts also mean that on-the-job training is limited, since there is seldom time or incentive for such interventions. In some CCI sectors, one can enter the industry by working as an unpaid volunteer to build up the social capital and experience needed. However, this is only possible if the resources are available to support the person during this time, again giving those from more affluent backgrounds the advantage (Siebert and Wilson, 2013).

Eikhof and Warhurst (2013) comment on the long and erratic working hours for those employed in the CCIs, which also sometimes involves travel. These working conditions can be particularly difficult for women, who are often the primary care-givers in family life. Oakley (2013) agrees, suggesting that, far from the discourse of cultural work as “good” work, the reality is that working conditions are often characterised by long hours, insecurity and lack of access to training. While some occupations in the CCIs are well-represented by labour unions in the UK (such as journalism, broadcasting, and acting), most others are not, offering little protection from the “often exploitative employment practices” in the CCIs.

Eikhof and Warhurst (2013) developed a model to show how the nature of production in the CCIs is translated into persistent social inequality. Their argument is that the model of production (characterised by project-based work, high risk and high sunk costs) leads to project-based employment (with high employment insecurity, reliance on social capital, and long, erratic working hours). This, in turn, leads to employment insecurity, the difficulty of breaking into the industry without social capital and networks, and with uncertain earnings, which all perpetuates social

inequality, with the sector being dominated by people from middle class backgrounds, and with more men than women being employed in the industry.

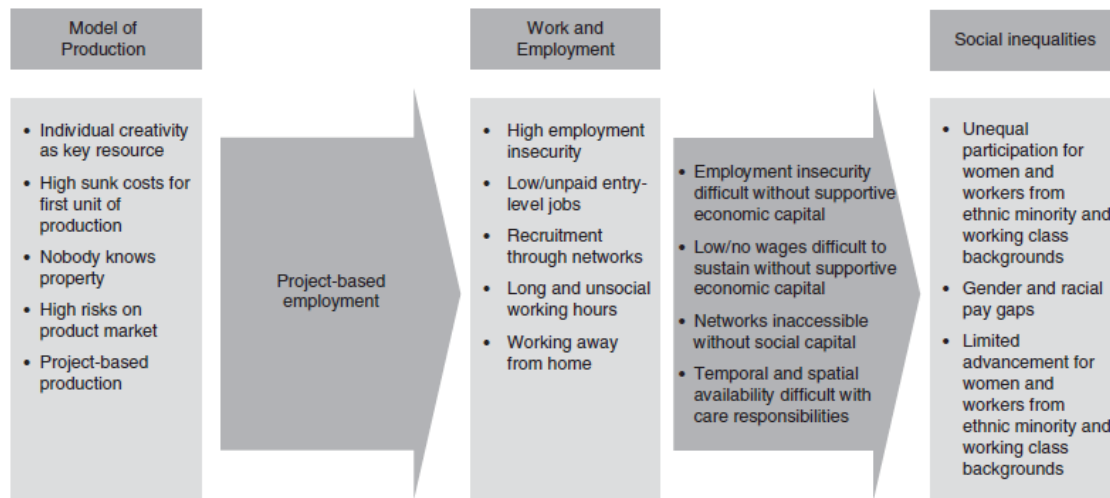


Figure 1: Production and Social Inequality in the Creative Industries

(Source: Eikhof and Warhurst, 2013)

3. Defining the CCIs and Cultural Occupations

The East African Community Creative and Cultural Industries Bill (2015) defines the CCIs as:

“The industries that originate from creativity or accumulation of culture which through the formation and application of intellectual properties, possess potential capacities to create wealth and job opportunities, enhance the citizens’ capacity for arts, and elevate the citizens’ living environment in the areas specified in the Schedule.”

Included in the schedule are traditional or “core” CCIs, such as visual arts, music and performing arts, but also the more commercial sectors, such as the design industry, advertising and architecture.

In 2009, UNESCO published a *Framework for Cultural Statistics* that attempted to produce an internationally recognized definition of culture, and allocated the CCIs into various Domains. According to UNESCO (2009: 9):

“Culture is the set of distinctive spiritual, material, intellectual and emotional features of society or a social group that encompasses, not only art and literature, but lifestyles, ways of living together, value systems, traditions and beliefs.”

The UNESCO Framework defines six main domains: Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audio-visual and Interactive Media and lastly, Design and Creative Services. Each cultural sector is placed within one specific domain. For example, music spans the domains of 'Performance and Celebration' and 'Audio-visual and Interactive Media' as it consists of both live performance and recorded music, but for the purposes of the Framework, it is placed in a single category, 'Performance and Celebration'. The Framework also includes Transversal Domains that run across all the six main domains. These include Education and Training; Archiving and Preserving; and Equipment and Supporting Materials.

To date, South Africa does not have a generally recognised definition of the CCIs, but most policy and discussion documents seem to be moving towards adopting the UNESCO system. As in many countries, South Africa has broadened its definition of the CCIs over time, with early reports, like the Cultural Industries Growth Strategy defining the cultural industries very narrowly to including only the music, film and video, publishing and craft sectors. The defining characteristic, following the UNESCO definition at the time, was the *symbolic* nature of the goods and services produced. The Gauteng (2008) and Western Cape (2008) mapping studies, produced a decade later, defined the 'creative economy' as including both the core cultural sector (producing work with symbolic meaning, such as art, performance, music and literature) as well as the more commercial creative industries (producing work protected by copyright, such as design, advertising and architecture) (See SACO, 2016 *Towards the Development of a Framework for Cultural Statistics in South Africa*, for further discussion).

The UNESCO (2009) Framework points out that cultural workers may be found in cultural industries, but also in other industries doing cultural work. In fact, research by Higgs and Cunningham (2008) shows that studies which only take into account people working in the creative industries could be underestimating people working in cultural occupations by up to 40%. A popular model for demonstrating this effect is the "Cultural Trident" which distinguishes between:

- "Workers with a cultural profession working in a cultural sector (e.g. an artist in an opera);
- Workers having a cultural profession but working outside the cultural sector (e.g. a designer in the car industry);
- Workers having a non-cultural profession and working in the cultural sector (e.g. a secretary in a film production company)" (Higgs and Cunningham, 2008:15).

The approach can also be used to the valuing of the annual income generated by each of these groups of workers and to track changes in CCI workforce composition over time.



Figure 2: The Creative Trident

(Source: Higgs and Cunningham, 2008)

While the UNESCO Framework (2009) argues that both cultural industries and cultural occupations should be included, Grodach and Seman (2013) argue that employment data should be focused on cultural *occupations* rather than industries. This is because cultural workers may hold more than one job, or may be self-employed and work on a contract basis across a range of industries. Recent studies of employment in the CCIs, such as that of Grodach and Seman (2013) in the US, and O'Brien et al. (2016) for the UK, have thus tended to use occupational, rather than industry classifications, as shown in table 1. While there are similarities, even where guided by the UNESCO (2009) Framework, each country is likely to choose somewhat different occupational classifications, based on the level of detail in their available data, but also on their particular areas of interest.

The UK study (2015) explains three different ways of understanding the CCIs:

1. The Creative Economy, which includes those employed in creative occupations inside and outside the creative sector, as well as those in non-cultural jobs in creative sector firms;
2. The Creative Industries, which is a sub-set of creative economy, focusing on cultural and non-cultural workers, but only those employed in CCIs (as was done in, for example, the 2014 South African mapping study);

3. Creative Occupations, which is a sub-set of the creative economy that focuses on cultural work both in, and outside of, cultural firms (which is what is recommended by Grodach and Seman (2013) and O'Brien et al. (2016) and the approach this study takes).

Table 1: Cultural sector occupation categories used in UK and US studies

UK Cultural Sector Occupations	US Cultural Sector Occupations
Publishing	Advertising and Promotions Managers
Authors, writers, and translators	Architects, except naval
Journalists, newspaper, and periodical editors	Architects, except landscape & naval
Advertising and marketing	Landscape Architects
Public relations professionals	Archivists, Curators and Museum Technicians
Marketing and sales directors	Archivists
Advertising accounts managers, creative directors	Curators
Advertising and public relations directors	Museum technicians and conservators
Marketing associate professionals	Artists and Related Workers
Music, performing and visual art	Art Directors
Musicians	Craft Artists
Dancers and choreographers	Fine Artists, Including Painters, Sculptors, and illustrators
Actors, entertainers, and presenters	Multi-Media Artists and Animators
Artists	Artists and Related Workers, All Other
Design: product, graphic, and fashion design	Designers
Graphic designers	Commercial and Industrial Designers
Product, clothing, and related designers	Fashion Designers
Architecture	Floral Designers
Architects	Graphic Designers
Chartered architectural technologists	Interior Designers
Town planning officers	Merchandise Displayers and Window Trimmers
Architectural and town planning technicians	Set and Exhibit Designers
IT, software, and computer services	Designers, All Other
Web design and development professionals	Actors
Programmers and software development Professionals	Producers and Directors
IT and telecommunications directors	Dancers and Choreographers
IT business analysts, architects and systems designers	Dancers
Museums, galleries, and libraries	Choreographers
Archivists and curators	Musicians, Singers, and Related Workers
Librarians	Music Directors and Composers
Film, TV, video, radio, and photography	Musicians and Singers
Arts officers, producers, and directors	Announcers
Photographers, AV and broadcasting equipment operators	Radio & television announcers
Crafts	Public address system & other announcers
Smiths and forge workers	News Analysts, Reporters & Correspondents
Glass and ceramics makers, decorators, and finishers	Broadcast News Analysts
Furniture makers and other craft woodworkers	Reporters and Correspondents
Other skilled trades	Public Relations Specialists
Weavers and knitters	Editors
Sources: US classifications from Grodach and Seman (2013); UK classifications from O'Brien et al. (2016)	Sound Engineering Technicians
	Photographers
	Television, Video, and Motion Picture Camera Operators and Editors
	Camera Operators, Television, Video, and Motion Picture
	Film and Video Editors
	Miscellaneous Media and Communication Equipment Workers
	Chefs & Head Cooks
	Motion Picture Projectionists
	Jewellers and Precious Stone & Metal Workers

4. Research Methods

4.1 Defining cultural occupations in South Africa

The first phase of this research was to examine the UNESCO definition of cultural occupations and to determine to what extent South African national data collection methods used by Statistics South Africa could be used to match this definition, and possible adaptations needed. (For more discussion see Hadisi and Snowball, 2016, *Measuring Cultural Employment in South Africa: A comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Codes*.)

Most of the occupations classified as cultural in the UNESCO system can be found in the South African Labour Force Survey (LFS) data (collected quarterly by Statistics South Africa) albeit in different major groups. As already outlined by Hadisi and Snowball (2016), it is possible to use the LFS to produce internationally comparable data. In designing the South African system of classifying cultural employment, LFS categories were compared to the UNESCO guidelines and international best-practice. Table 1 shows those occupational categories in the LFS that were classified as “cultural employment” in this study.

In a few cases, the UNESCO categories were not in alignment with the South African categories. In those cases, the following was done:

- The SA system includes LFS code 3479 “Art, entertainment and sports associate professionals not elsewhere classified (n.e.c)”. Strictly speaking, sport is a “related” domain in the UNESCO Framework for Cultural Statistics (2009) and no other country includes it in cultural employment. However, UNESCO does include 3435 “Other artistic and cultural associate professionals”, and “Art, entertainment and sport associate professional n.e.c”, which overlap with LFS category 3479. The inclusion of sports associate professionals may lead to an over-statement of cultural employment in this category compared to the UNESCO system.
- The SA LFS does not differentiate between higher education professionals enough to allow identification of cultural occupations. However, some kinds of education and educational professionals are classified as part of cultural employment by UNESCO (for example, language, music and art teachers). Based on the weightings suggested by UNESCO for countries using ISCO-88 4 digit codes, the SA system weights LFS category 2310 (“Technikon, teacher training, technical and other colleges, university and other higher education institution teaching professionals”) at 2.5% and LFS category 2390 (“Other education professionals n.e.c.”) at 20%.

- The UNESCO system includes “Web and multimedia developers”, weighted at 5%. There is no comparable category in the LFS. To overcome this difficulty, two categories are included: LFS category 2132, “computer programmers” and LFS category 2131 “computer system designers and analysts”, both weighted at 5% as suggested by UNESCO. Note that there is little international agreement on what parts of the IT sector should be included in cultural employment, and how they should be weighted, with the UK including almost the whole sector unweighted, while the US includes very little of it.
- The UNESCO system includes “Traditional and complementary medical professionals”. In the SA LFS there is no exact comparison, so LFS categories 3241, “traditional medical practitioners” and 3242 “faith healers” were included instead. The LFS also does not have a comparable category to 2230 “traditional and complementary medicine associate professionals” either, which are included in the UNESCO system.
- The UNESCO system includes 3431 “photographers”, but the LFS includes “Photographers and image recoding equipment operators” in one category (3131). This inclusion may lead to an over-statement of cultural employment in this category compared to the UNESCO system.
- The LFS does not allow for the identification of chefs, which are probably included in the general, much larger category of “cooks” (5122). In the absence of any weighting guidelines, we exclude this category. This omission may be an under-estimation of cultural employment compared to UNESCO.
- Although the UNESCO system does not include 7490 “Other craft and related trades workers n.e.c”, this group is judged important for South Africa, as it includes, amongst others, handicraft workers and beading, so it was included.
- The LFS does not have the following occupational categories, which are included in the UNESCO system:
 - 1349 “Professional service managers n.e.c. (weighted at 5%)”
 - 3433 “Gallery, library and museum technicians (all included)”
 - 7316 “Sign writers, decorative painters, engravers and etchers (all included)”.

While some of these occupations may form part of other groups that were included in the SA system. It is important to mention that, there might be omissions or inclusions of some cultural occupations, which either may result in an under-estimation or over-estimated the cultural employment compared to UNESCO. In classifying occupations, a numerical system is used to identify divisions, which are arranged into groups by Major, sub-major, minor, unit group and sub-group. The following table displays; three digit codes denoting the third level of the classification identifying the minor group.

Four digit codes denoting the fourth level of the classification identified as the unit-group. Thus, the more digits there are, the more detailed the occupational classification becomes¹.

Table 2: South African occupations that were included in the definition of “cultural employment”

4-digit code	Description	Weighting
111. LEGISLATORS		
1130.	Traditional chiefs and heads of villages	100%
123. OTHER MANAGERS/DEPARTMENT MANAGERS		
1234.	Advertising and public relations managers/department managers	100%
213. COMPUTING PROFESSIONALS		
2131.	Computer systems designers and analysts	5%
2132.	Computer programmers	5%
214. ARCHITECTS, ENGINEERS AND RELATED PROFESSIONALS		
2141.	Architects, town and traffic planners	100%
2148.	Land surveyors, Cartographers and other surveyors	100%
231. COLLEGE, UNIVERSITY AND HIGHER EDUCATION INSTITUTIONS TEACHING PROFESSIONALS		
2310.	Technikon, teacher training, technical and other colleges, university and other higher education institutions teaching professionals	2.5%
243. ARCHIVISTS, LIBRARIANS AND RELATED INFORMATION PROFESSIONALS		
2431.	Archivists and curators	100%
2432.	Librarians and related information professionals	100%
244. SOCIAL SCIENCE AND RELATED PROFESSIONALS		
2442.	Sociologists, anthropologists and related professionals	100%
2444.	Philologists, translators and interpreters	100%
245. WRITERS AND CREATIVE OR PERFORMING ARTISTS		
2451.	Authors, journalists and other writers	100%
2452.	Sculptors, painters and related artists	100%
2453.	Composers, musicians and singers	100%
2454.	Choreographers and dancers	100%
2455.	Film, stage and related actors and directors	100%
246. RELIGIOUS PROFESSIONALS		
2460.	Religious professionals	100%
311. NATURAL AND ENGINEERING SCIENCE TECHNICIANS		
3118.	Draughtspersons	100%
313. OPTICAL AND ELECTRONIC EQUIPMENT OPERATORS		
3131.	Photographers and image recoding equipment operators	100%
324. TRADITIONAL MEDICINE PRACTITIONERS AND FAITH HEALERS		
3241.	Traditional medicine practitioners	100%
3242.	Faith healers	100%
347. ARTISTIC, ENTERTAINMENT AND SPORTS ASSOCIATE PROFESSIONALS		
3471.	Decorators and commercial designers	100%
3472.	Radio, television and other announcers	100%

¹ See Appendix 1 for classification by UNESCO (FCS, 2009) Cultural Domain

3473.	Street, nightclub and related musicians, singers and dancers	100%
3474.	Clowns, magicians, acrobats and related associate professionals	100%
3479.	Art, entertainment and sport associate professionals not elsewhere classified	100%
348. RELIGIOUS ASSOCIATE PROFESSIONALS		
3480.	Religious associate professionals	100%
414. LIBRARY, MAIL AND RELATED CLERKS		
4141.	Library and filing clerks	100%
731. PRECISION WORKERS IN METALS AND RELATED MATERIALS		
7311.	Precision-instrument/instrument makers and repairers (including apprentices/trainees)	40%
7312.	Musical instrument makers and tuners (including apprentices/trainees)	100%
7313.	Jewellery and precious-metal workers (including apprentices/trainees)	100%
732. POTTERS, GLASS – MAKERS AND RELATED TRADES WORKERS		
7321.	Potters and related workers	100%
7322.	Glass-makers, cutters, grinders and finishers (including apprentices/trainees)	100%
7323.	Glass-engravers and etchers (including apprentices/trainees)	100%
7324.	Glass, ceramics and related decorative painters (including apprentices/trainees)	100%
733. HANDICRAFT WORKERS IN WOOD, TEXTILE, LEATHER AND RELATED MATERIALS		
7331.	Handicraft workers in wood and related materials (including apprentices/trainees)	100%
7332.	Handicraft workers in textile, leather and related materials (including apprentices/trainees)	100%
742. WOOD TREATERS, CABINETMAKERS AND RELATED TRADES WORKERS		
7422.	Cabinet makers and related workers (including apprentices/trainees)	100%
743. TEXTILES, GARMENT AND RELATED TRADES WORKERS		
7432.	Weavers, knitters and related workers (including apprentices/trainees)	10%
7433.	Tailors, dressmakers and hatters (including apprentices/trainees)	100%
7435.	Textile, leather and related material pattern-makers and cutters (including apprentices/trainee)	100%
7436.	Sewers, embroiderers and related workers (excluding apprentices/trainees)	100%
7437.	Upholsterers and related workers (including apprentices/trainees)	5%
744. PELT, LEATHER AND SHOEMAKING TRADES WORKERS		
7441.	Pelt dressers, tanners and fellmongers (including apprentices/trainees)	100%
7442.	Shoemakers and related workers (including apprentices/trainees)	100%
749. OTHER CRAFT AND RELATED TRADES WORKERS N.E.C.		
7490.	Other craft and related trades workers n.e.c	100%

(Source: SASCO, 2001).

4.2 The South African Labour Market Dynamics Report/Dataset

The Quarterly Labour Force Survey (QLFS) and the Labour Market Dynamics of South Africa report (LMDSA) are produced by Statistics South Africa. 2014 marks the seventh year of publication of the South African Labour Market Dynamics report, since that the Quarterly Labour Force Survey (QLFS) has been initiated and redesigned in 2008. The Labour market Dynamics South Africa (LMDSA) report of 2014 provides information on Labour market trends over the period of 2008 – 2014, from the Quarterly Labour Force Survey (QLFS) panel data. The panel data facilitate the tracking of individuals on a quarterly basis (e.g., movement of individuals into employment, as well as identifying trends in sectors, industries, occupations, and provinces). In addition, Statistics South Africa have produced an annual dataset based from all four QLFS dataset. In another words, the QLFS represents a dataset for each of the 4 quarters of the year of 2014, and the LMDSA is the combination of the four quarterly datasets from the QLFS to form an annual dataset on which the Labour Market Dynamics in South Arica report is based (QLFS guide, August, 2008: 1-2; QLFS metadata, quarter 4, 2014: 1-2; LMDSA metadata, 2014: 1-2).

The sample used in the QLFS is designed to be representative at provincial level and even within provinces at metro and non-metro level. The survey covers the entire national population aged 15 years and over. However, the survey does not cover the non-institutional population, except for workers' hostels. People living in private dwelling units within institutions are counted (e.g., in a school compound, the schoolmaster's house and teacher's accommodation are private dwellings). The QLFS contains a sample size of roughly 30 000 dwellings per quarter. It is divided equally into four subgroup or panel called rotation groups (e.g., 7500 dwellings per rotation group). The data sample is based on information collected during the 2001 population Census conducted by Statistics South Africa.

Before the 2001 Census, the country was divided into 80787 Enumeration Areas (EAs), and Stats SA's household-based survey used a master sample of Primary Sampling Units (PSUs) which includes EAs that are drawn from across the country. The current sample size is 3080 PSUs. For instance, dwellings selected from the PSUs assigned to rotation group "1" are rotated in the first quarter, similarly, the dwellings selected from the PSUs assigned to rotation group "2" are rotated in the second quarter, and the dwellings selected from the PSUs assigned rotation group "3" are rotated in the third quarter, and finally, the dwellings selected from the PSUs assigned rotation group "4" are rotated in the fourth quarter.

If a household moves out of a dwelling after being in the sample for 2 quarters and a new household moves in then, the new household will be enumerated for the next two quarters. If no household

moves into the sampled dwelling, the dwelling will be classified as vacant (unoccupied). That is why each quarter of the sampled dwellings rotate out of the sample and are replaced by new dwellings from the same PSUs or the next PSU on the list. The idea is that the selected dwelling units would remain in the sample for four consecutive quarters, with one-fourth of these dwelling units rotating out each round of the survey. This sampling methodology (dwelling unit or Primary Sampling Units (PSU) is adopted because households are mobile and cannot easily be tracked. Therefore, the unit of sampling is the dwelling unit and the unit of observation is the household. The rotation groups allow each of these groups to have the same distribution pattern as that which is observed in the whole sample (QLFS guide, August, 2008: 1-2; QLFS metadata, quarter 4, 2014: 1-2; LMDSA metadata, 2014: 1-2).

The sampling weights for the data collected from the sampled households are constructed in such a manner that the responses can be properly expanded to represent the entire citizen/national population of South Africa. However, the weights are the results of numerous calculations involving several factors which are taken into considerations such as original selection probabilities, adjustment for non-response, benchmarking to known population estimates from the Demography division of Stats SA (QLFS guide, August, 2008: 1-2; QLFS metadata, quarter 4, 2014: 1-2; LMDSA metadata, 2014: 1-2). Note that, for further details, various documents and summary are provided on the Stats SA website: www.statssa.gov.za and www.datafirst.uct.ac.za

5. Results

The results of this research are broadly divided into two sections: A detailed cross-sectional analysis of cultural and creative occupations in 2014 (the latest data available at the time of the research); and a discussion of changes in cultural and creative employment over time, from 2008 to 2014.

5.1 The size of cultural and creative employment

The Labour Force Dynamics South Africa annual dataset (LMDSA) for 2014 had 234 253 observations (or interviews). Of the people surveyed, about 55% were classed economically active, made up of the employed (36.17%), unemployed, using the narrow definition (12.45%), or discouraged work seekers (6.36%). The remaining 45% were not economically active. The total sample size for those who were classed as employed was 84721 (LMDSA annual dataset, 2014).

Using the definition of cultural occupations discussed above, 2.93% of employed South Africans (2480 observations) were identified as being culturally employed. The Labour Market Dynamics Survey

reports total employment in South Africa for 2014 as 15.146 million. The CCIs, making up 2.93% of this, amounts to 443 778 jobs.

Table 3: Cultural occupations as a percentage of all occupations

Occupation category	Observation	Percentage
Cultural occupations	2480	2.93%
Non – cultural occupations	82241	97.07%
Total	84721	100%

(Source: LMDSA annual dataset, 2014. Authors’ own calculations)

To give an indication of the relative size of employment creation in the CCIs, the table below shows employment (number of jobs) by industry in South Africa (LMDSA report, 2014).

Table 4: Employment by industry in South Africa, 2014

Employment in SA by Industry	Percentage of Jobs	Number of Jobs (Thousand)
Total		15146
Agriculture	4.63%	702
Mining	2.83%	428
Manufacturing	11.62%	1760
Utilities	0.77%	117
Construction	8.25%	1249
Trade	21.14%	3202
Transport	6.15%	932
Finance & Business Services	13.40%	2030
Community & Social Services	23.06%	3493
Private households	8.12%	1230

(Source: LMDSA report, 2014. Authors’ own percentage calculation)²

What the table shows is that those working in cultural occupations (both in the CCIs and in cultural occupations in non-CCI industries) account for slightly more jobs in South Africa than the mining sector, and about two-thirds as many as agriculture. Another way of expressing this is that, in 2014, 1 in every 34 jobs in South Africa was cultural or creative.

5.2 Who are the people working in Cultural Occupations?

As outlined in the literature, one of the important questions for the CCIs is their diversity. As shown in Figure 3, those working in cultural occupations are somewhat less racially diverse than those in non-cultural occupations. In non-cultural occupations, 71.4% of workers are African, 14.3% are coloured, 2.9% are Indian or Asian, and 11.4% are white. In cultural occupations, the proportions of African (66.9%), coloured (11.9%) and Indian/Asian (2.2%) workers are somewhat lower, while the percentage of white workers (19%) is higher.

² Note: total includes “other industry”.

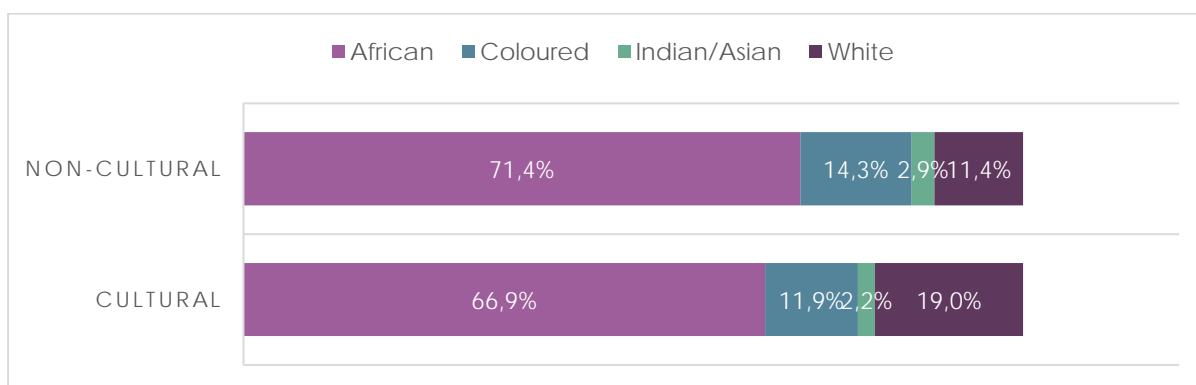


Figure 3: A comparison of race groups employed in cultural and non-cultural occupations

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

In terms of gender, slightly more workers in cultural occupations are men (51.7%), but this is still slightly lower than in non-cultural occupations, where men make up 52.5% of employed persons. However, there is evidence of gender bias in terms of the earnings and types of work that men and women do in both cultural and non-cultural occupations, which will be explored later in this report.

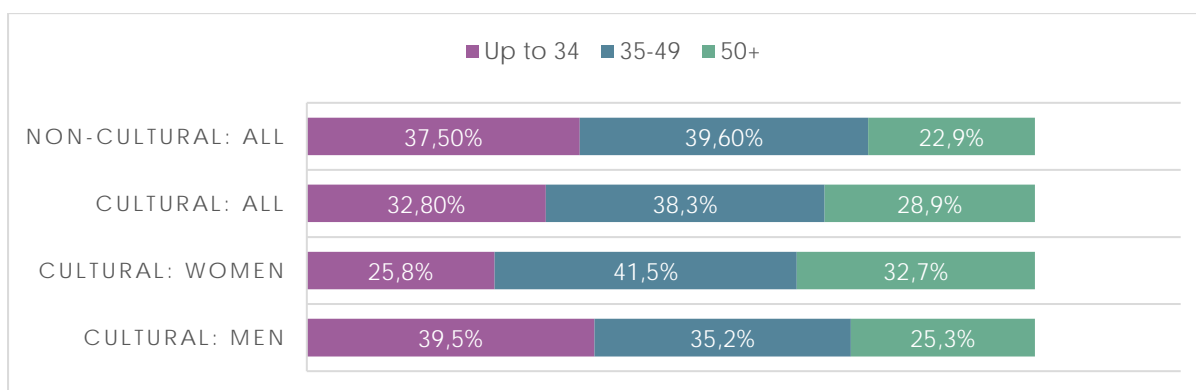


Figure 4: Age groups of those employed in cultural and non-cultural occupations

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculation).

The age groups of those working in cultural occupations was generally older than those in non-cultural occupations (Figure 4). However, there were big differences between the age groups of men and women in cultural occupations: nearly 40% of men in cultural occupations were younger than 35, but only 25.8% of women in cultural occupations fell into this category, with much larger percentages of women in cultural occupations being in the older age groups (41.5% in the 35-49-year-old age group, compared to only 35.2% of men; and 32.7% being older than 50, compared to only 25.3% of men).

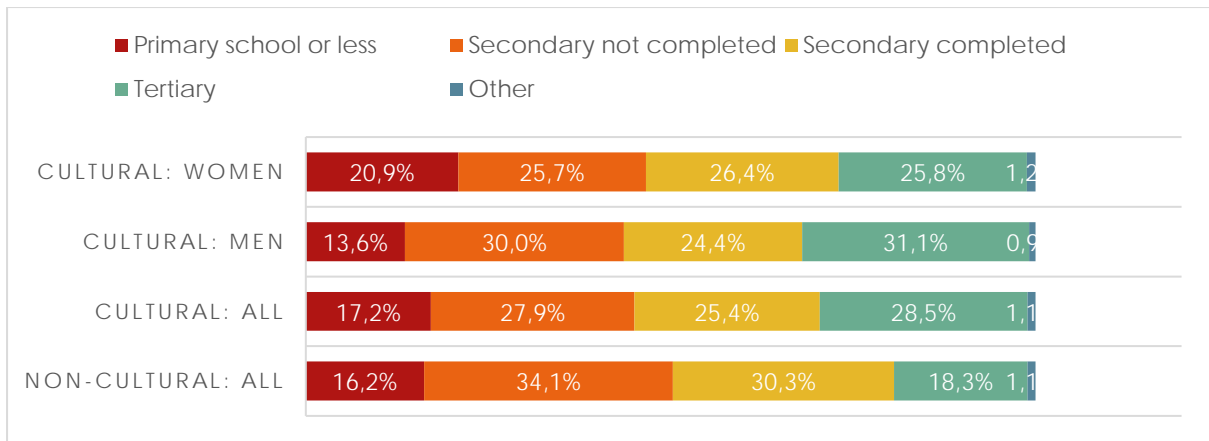


Figure 5: A comparison of education levels in the cultural and non-cultural sectors

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

As found in many other studies, those working in cultural occupations tend to be better educated than those working in non-cultural occupations (Figure 5). This is particularly evident when comparing tertiary education: 28.5% of those working in cultural occupations have tertiary education compared to only 18.3% of those in non-cultural occupations. In terms of gender differences, 31.1% of men in cultural occupations have tertiary education, compared to only 25.8% of women.

5.3 What is it like to work in Cultural Occupations?

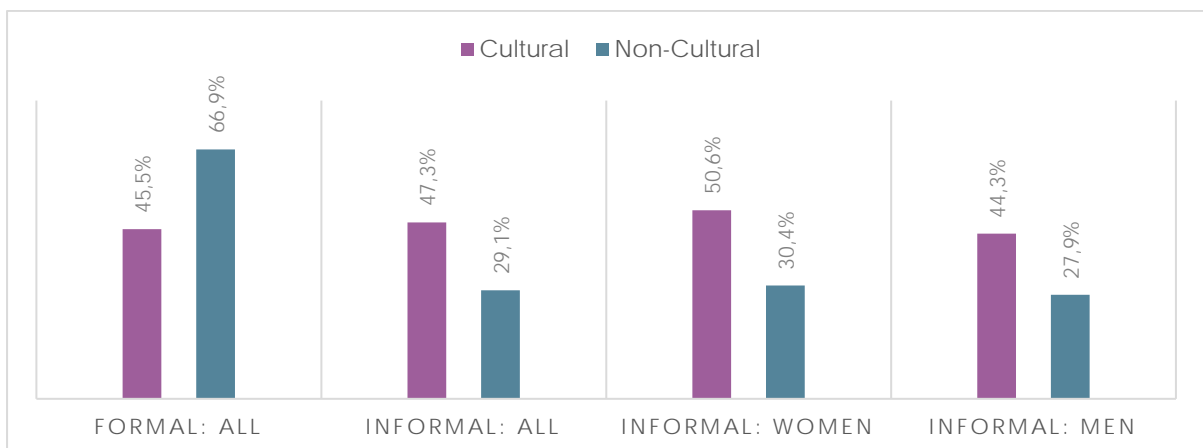


Figure 6: Formal and informal employment in cultural and non-cultural occupations³

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

In non-cultural occupations, about 66.9% of employment is formal, and less than 30% is informal. In cultural occupations, a higher percentage of jobs (47.3%) are informal than formal (45.5%)⁴. As in non-

³ Note that figures do not add up to 100% because of a small "other" category not shown in the figure.

⁴ Note that numbers do not add up to 100% because of a small "other" category not included in the figure.

cultural occupations, a greater percentage of women (50.5%) work in the informal sector than men (44.3%).

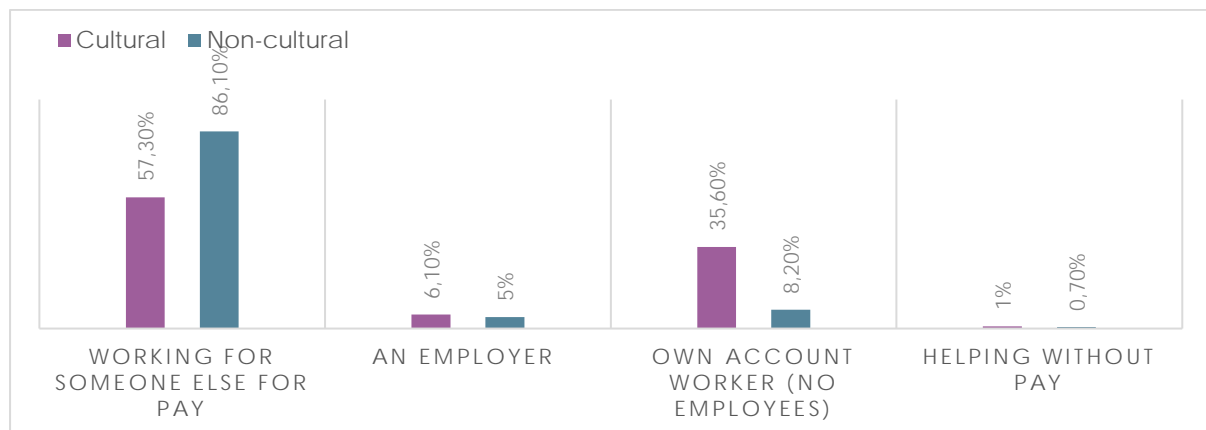


Figure 7: Types of employment in cultural and non-cultural occupations

(Source: LMDSA annual dataset, 2014. Authors’ own percentage calculations)

When one considers the types of employment, large differences between the cultural and non-cultural sectors emerge. The vast majority of those working in non-cultural jobs are “working for someone else for pay” (86.1%) – that is, they are employees. In cultural occupations, only 57.3% of people are employees, while more than a third (35.6%) are “own account workers” with no employees. Only 8.2% of non-cultural occupations fall into this category. This finding provides support for the theory that free-lance work is much more common in cultural than in non-cultural occupations.

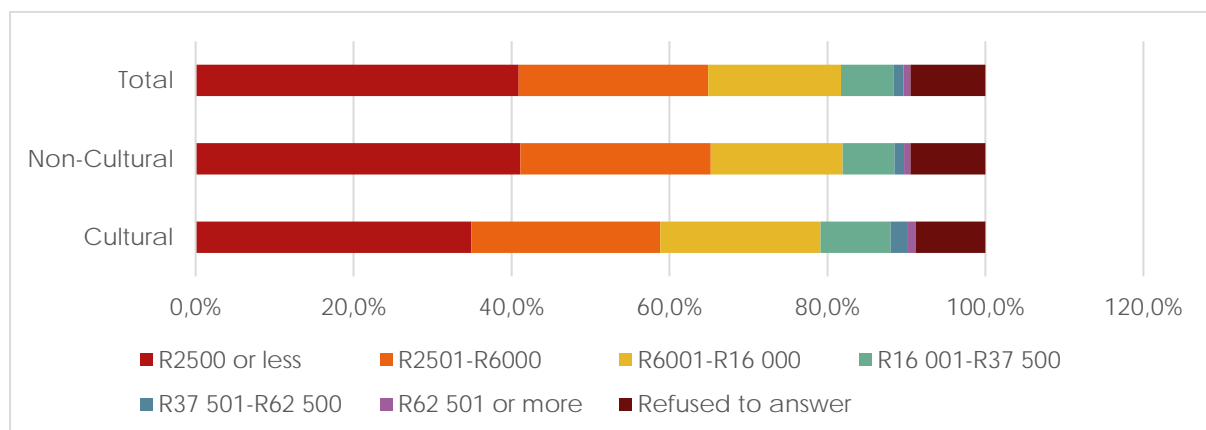


Figure 8: Income categories for cultural and non-cultural occupation workers

(Source: LMDSA annual dataset, 2014. Authors’ own percentage calculations)

Table 5: Salaries in cultural and non-cultural occupations

Salary	Cultural	Non-Cultural	Total
R2500 or less	34.9%	41.1%	40.9%
R2501-R6000	23.9%	24.1%	24.0%
R6001-R16 000	20.3%	16.7%	16.8%

R16 001-R37 500	8.9%	6.6%	6.7%
R37 501-R62 500	2.2%	1.2%	1.2%
R62 501 or more	1.0%	0.8%	0.9%
Refused to answer	8.8%	9.5%	9.5%

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

Given the generally higher levels of education of those working in cultural occupations, it is no surprise that earnings are generally higher compared to non-cultural occupations. As shown in the table and figure above, a lower percentage of those working in cultural occupations fall into the bottom two income categories (R2500 or less; R2501-R6000), and a higher proportion of those working in cultural occupations fall into the higher income categories (from R6001-R16 000 onwards).

5.4 Are there Cultural Clusters?

A school of thought in cultural employment studies, started by Florida's (2002) *Rise of the Creative Class*, is that cultural and creative sector workers tend to "cluster" or group, usually around larger cities. The Labour Force data in South Africa allows one to examine the types of occupation by province, as shown in Figure 9.

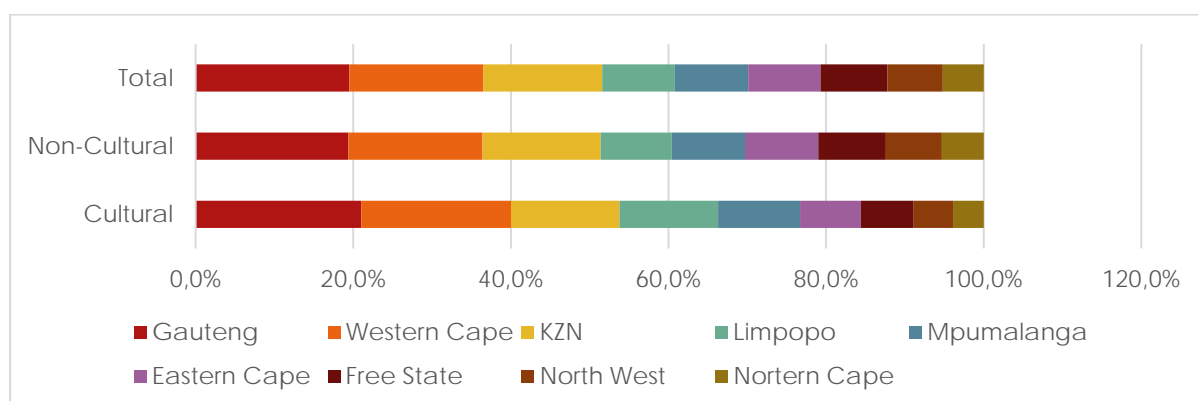


Figure 9: Proportion of cultural and non-cultural occupations by Province.

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

Table 6: Proportion of cultural and non-cultural occupations by province

Province	Number of Cultural jobs	Proportion of Cultural occupations in SA	Proportion of Non-Cultural occupations in SA	Proportion of Total jobs in SA
Gauteng	93 193	21.0%	19.4%	19.5%
Western Cape	84 318	19.0%	17.0%	17.0%
KZN	61 242	13.8%	15.0%	15.1%
Limpopo	55 472	12.5%	9.0%	9.2%
Mpumalanga	46 153	10.4%	9.3%	9.3%
Eastern Cape	34 171	7.7%	9.3%	9.2%
Free State	29 733	6.7%	8.6%	8.5%
North West	22 189	5.0%	7.1%	7.0%
Northern Cape	17 307	3.9%	5.3%	5.2%

(Source: LMDSA annual dataset, 2014 and LMDSA report 2014. Authors' own percentage calculations)

What the results show is that the two wealthiest provinces (Gauteng and the Western Cape) are also those with the highest proportion of cultural occupations in South Africa. In fact, in both cases, their proportion of cultural occupations is larger than the proportion of jobs overall. For example, 19.5% of all employment in South Africa is found in Gauteng, but 21% of all South African cultural occupations are found in this province. The same goes for the Western Cape: 17% of total jobs, but 19% of cultural and creative occupations. This suggests that cultural and creative occupations do tend to concentrate in certain areas.

5.5 Changes in cultural occupations over time

One of the great advantages of using national-level data is that it allows a comparison of cultural and non-cultural employment over time. Since the LFS has been running in its current form since 2008, an analysis of data over the time period 2008 – 2014 is shown below.

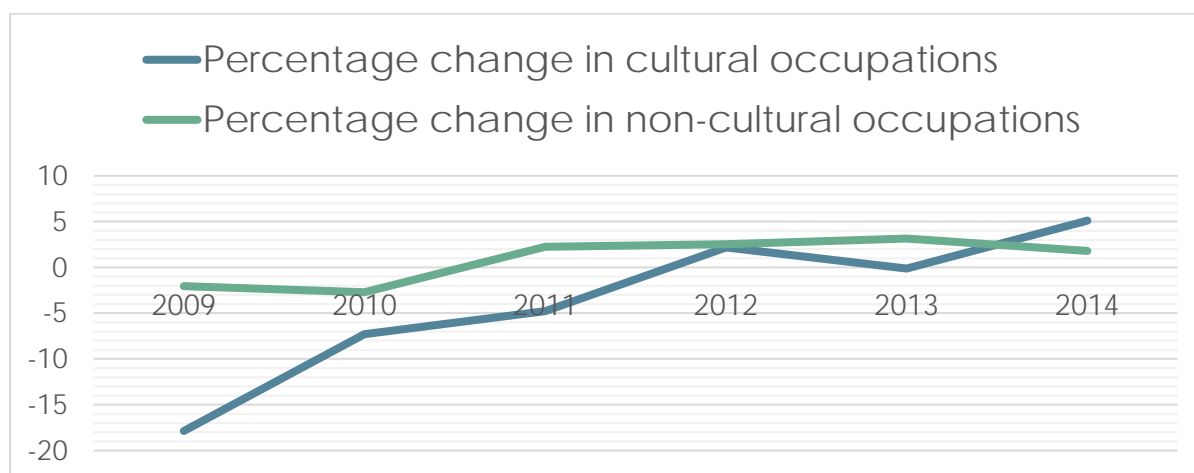


Figure 10: Percentage change in cultural and non-cultural employment 2008 – 2014

(Source: LMDSA annual datasets, 2008-2014. Authors' own percentage calculations)

What figure 10 and table 7 show is that, as found in other countries as well, cultural employment is more volatile than non-cultural sector jobs. For example, as a response to the 2008/9 financial crisis and the resultant fall in economic growth, employment in both cultural and non-cultural sectors decline, but non-cultural employment declined by 2%, while cultural employment declined by nearly 18%.

Table 7: Percentage change in cultural and non-cultural employment 2008 – 2014

Year	2009	2010	2011	2012	2013	2014
Percentage change in cultural occupations	-17.86	-7.28	-4.76	2.17	-0.11	5.11
Percentage change in non-cultural occupations	-2.06	-2.71	2.27	2.53	3.15	1.79

(Source: LMDSA annual datasets, 2008-2014. Authors' own percentage calculations)

However, once the economy starts to recover, cultural employment grows quickly and, in 2014, cultural employment grew at a faster rate than non-cultural employment.



Figure 11: Percentage change in cultural and non-cultural employment 2008 – 2014

(Source: LMDSA annual datasets, 2008-2014. Authors’ own percentage calculations)

Time-series data also allows one to compare changes in the demographics of those working in cultural occupations. Figure 11 shows that the percentage of black African, coloured and Indian or Asian people employed in cultural occupations has remained relatively stable over time, but is also a lower percentage than in non-cultural occupations. This supports the theory (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O’Brien et al., 2016) that the CCIs can be difficult to break into. Similarly, the percentage of women in cultural occupations is fairly stable over time, but has dropped by 5% since the 2008/9 crisis.

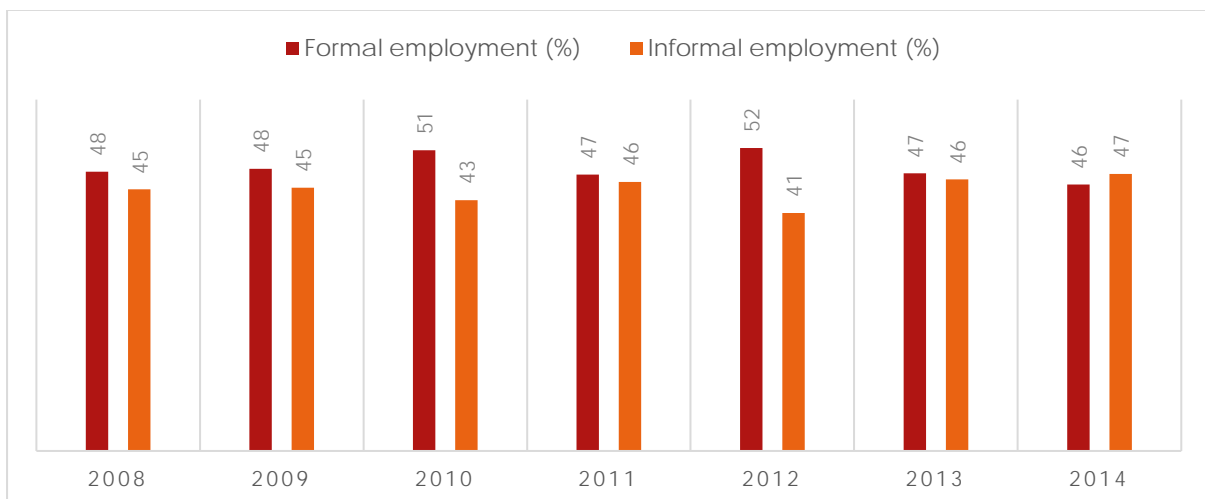


Figure 12: Formal and Informal employment in cultural occupations 2008-2014

(Source: LMDSA annual datasets, 2008-2014. Authors’ own percentage calculations)

An analysis of the types of employment in cultural occupations over time, shows that for most of the time series (2008-2013) formal sector employment made up a greater percentage of cultural jobs than informal sector employment. However, formal sector employment declines from 2012 onwards, while informal sector cultural jobs grow, until, in 2014, the informal sector makes up a greater percentage of jobs than the formal sector. At the same time (Figure 13), the percentage of people in cultural employment who work as an employee for someone else declines, and the percentage of “own account” workers (freelance) increases.

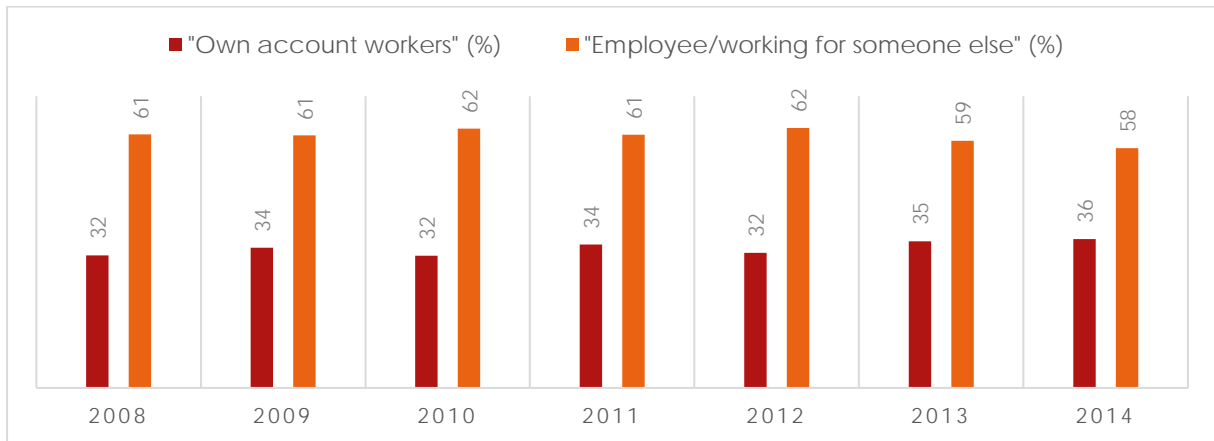


Figure 13: Changes in the types of cultural jobs 2008 – 2014

(Source: LMDSA annual datasets, 2008-2014. Authors’ own percentage calculations)

What the time-series analysis shows is that cultural occupations can grow faster than non-cultural sector employment, but that cultural occupations are volatile and very sensitive to economic downturns, such as the 2008/9 crisis. However, cultural employment is also adaptable, in that there is some movement between formal and informal sectors, and between type of employment over time. However, it should be noted that a time series of only seven years is not really long enough to draw robust conclusions on longer term trends.

6. Concluding Remarks

This report has demonstrated how reliable, national-level data, collected by Statistics South Africa, can be used to provide information on cultural employment. Being based on a large, carefully constructed sample that is representative at national and provincial levels, it is our contention that this analysis has a higher level of reliability and validity than previous estimates of cultural employment.

Results show that cultural and creative occupations contribute significantly to employment in South Africa, making up 2.93% of total employment in 2014 (443 778 jobs), which is slightly more than the mining sector, and about two thirds of the number of agricultural jobs. (Note that this only includes those working in “cultural occupations”, both in the cultural and creative industries, and outside of them, but does not include those working in the CCIs in non-cultural jobs.) Time series analysis has shown that, while cultural employment can grow faster than non-cultural employment, it is more volatile, being significantly affected by economic downturns.

Compared to non-cultural jobs, more jobs in the cultural sector are in the informal sector, especially for women. There are also significantly more freelance (or “own account”) workers in cultural employment. The percentage of black African, coloured and Indian or Asian people employed in cultural occupations is somewhat lower (81% in 2014) than in non-cultural occupations (89%).

As also found in other studies, cultural workers tend to have higher levels of education and earnings than non-cultural workers, suggesting that this sector has the potential to boost economic growth. However, cultural jobs tend to “cluster” in some provinces, notably those with larger cities.

In terms of the way forward, there are a number of potentially useful extensions to consider:

- (i) Production of an annual report as new data becomes available would enable the Department of Arts and Culture and CCI stakeholders to access valuable information on the state of the sector, and to demonstrate its importance in job creation;
- (ii) More detailed analysis of employment in the various CCI sub-sectors or Domains (see Appendix 1) could help to identify those parts of the CCIs that are contributing most in terms of employment creation, and analysis of the types of employment they create and their performance over time could be useful for designing policy interventions;
- (iii) Analysis of cultural employment at Provincial level could be useful in designing regional policies and in identifying clusters and growth nodes; and

- (iv) As a longer-term project, the use of national data to identify and classify “cultural industries” so that employment in the whole cultural trident could be calculated (referred to as the “cultural economy”) could be considered. Such an analysis would give a reliable estimate of the contribution of the CCIs (including both cultural and non-cultural jobs within this industry) to employment creation in South Africa. However, this would require the South Africa Standard Industrial Classification system to publish data to at least a 4-digit code, which would allow the identification of the cultural industries.

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Appendix 1: The Framework for Cultural Statistics by Cultural Domain

The UNESCO Framework for Cultural Statistics (2009) classified the cultural and creative sector by Domain, separated into six main Domains (A to F), as well as some Transversal Domains, such as Intangible Cultural Heritage:

- Cultural and Natural Heritage **(A)**;
- Performance and Celebration **(B)**;
- Visual Arts and Crafts **(C)**;
- Books and Press **(D)**;
- Audio-visual and Interactive Media **(E)**; and
- Design and Creative Services **(F)**;
- Intangible Cultural Heritage (transversal domain) **(ICH)**

The cultural domains defined in FCS represent a common set of economic (production of goods and services) and social (participation in culture activities) activities that traditionally have been regarded as being “cultural” (UNESCO FCS, 2009:10). Appendix Tables 1 to 3 apply the UNESCO FCS (2009) to the South African definition of “cultural occupations” derived in Hadisi and Snowball (2016).

Appendix Table 1: South African LFS occupations that were included in the definition of “cultural employment” (4-digit occupation codes, for domains defined according to the UNESCO).

4-digit code	Description	Weighting	FCS domain
1130.	Traditional chiefs and heads of villages	100%	ICH
1234.	Advertising and public relations managers/department managers	100%	F
2131.	Computer systems designers and analysts	5%	F
2132	Computer programmers	5%	F
2141.	Architects, town and traffic planners	100%	F
2148.	Land surveyors, Cartographers and other surveyors	100%	F
2310.	Technikon, teacher training, technical and other colleges, university and other higher education institutions teaching professionals	2.5%	EDU
2431.	Archivists and curators	100%	A
2432.	Librarians and related information professionals	100%	D
2442.	Sociologists, anthropologists and related professionals	100%	A

2444.	Philologists, translators and interpreters	100%	D
2451.	Authors, journalists and other writers	100%	D
2452.	Sculptors, painters and related artists	100%	C
2453.	Composers, musicians and singers	100%	B
2454.	Choreographers and dancers	100%	B
2455.	Film, stage and related actors and directors	100%	E
2460.	Religious professionals	100%	ICH
3118.	Draughtspersons	100%	F
3131.	Photographers and image recoding equipment operators	100%	C
3241.	Traditional medicine practitioners	100%	ICH
3242.	Faith healers	100%	ICH
3471.	Decorators and commercial designers	100%	F
3472.	Radio, television and other announcers	100%	E
3473.	Street, nightclub and related musicians, singers and dancers	100%	B
3474.	Clowns, magicians, acrobats and related associate professionals	100%	B
3479.	Art, entertainment and sport associate professionals not elsewhere classified	100%	B
3480.	Religious associate professionals	100%	ICH
4141.	Library and filing clerks	100%	D
7311.	Precision-instrument/instrument makers and repairers (including apprentices/trainees)	40%	C
7312.	Musical instrument makers and tuners (including apprentices/trainees)	100%	B
7313.	Jewellery and precious-metal workers (including apprentices/trainees)	100%	C
7321.	Potters and related workers	100%	C
7322.	Glass-makers, cutters, grinders and finishers (including apprentices/trainees)	100%	C
7323.	Glass-engravers and etchers (including apprentices/trainees)	100%	C
7324.	Glass, ceramics and related decorative painters (including apprentices/trainees)	100%	C
7331.	Handicraft workers in wood and related materials (including apprentices/trainees)	100%	C
7332.	Handicraft workers in textile, leather and related materials (including apprentices/trainees)	100%	C
7422.	Cabinet makers and related workers (including apprentices/trainees)	100%	C
7432.	Weavers, knitters and related workers (including apprentices/trainees)	10%	C
7433.	Tailors, dressmakers and hatters (including apprentices/trainees)	100%	C

7435.	Textile, leather and related material pattern-makers and cutters (including apprentices/trainee)	100%	C
7436.	Sewers, embroiderers and related workers (excluding apprentices/trainees)	100%	C
7437.	Upholsterers and related workers (including apprentices/trainees)	5%	C
7441.	Pelt dressers, tanners and fellmongers (including apprentices/trainees)	100%	C
7442.	Shoemakers and related workers (including apprentices/trainees)	100%	C
7490.	Other craft and related trades workers n.e.c	100%	C

Appendix Table 2: South African LFS occupations that were included in the definition of “cultural employment” (4-digit occupation codes, for domains defined according to the UNESCO).

Domain	Domain name	SASCO/LFS-2001
A	Cultural and Natural Heritage	2431,2442
B	Performance and Celebration	2453,2454, 3473,3474,3479,7312
C	Visual Arts and Crafts	2452,3131,7311,7313,7321,7322,7323,7324,7331, 7332,7422,7432,7433,7435,7436,7437,7441,7442, 7490
D	Books and Press	2432,2444,2451,4141
E	Audio-Visual and Interactive Media	2455,3472
F	Design and Creative Services	1234, 2131,2132, 2141,2148,3118,3471,
EDU	Education and training (cultural)	2310

Appendix Table 3: South African LFS occupations that were included in the definition of “cultural employment” (4-digit occupation codes, for Intangible heritage defined according to the UNESCO).

4-digit code	Description	FCS domain
1130	Traditional chiefs and heads of villages	ICH
2460	Religious professionals	ICH
3241	Traditional medicine practitioners	ICH
3242	Faith healers	ICH
3480	Religious associate professionals	ICH