

Mapping Study Data: Visual Arts and Crafts

In 2014, the South African Department of Arts and Culture (DAC, 2014) commissioned a Mapping Study of the Cultural and Creative Industries (CCIs), conducted by the research consulting company, Plus 94. A definition of CCIs based on the UNESCO (2009) cultural domains was used and included: Cultural and Natural Heritage; Performance and Celebration, Visual Arts and Crafts, Information, Books and Press; Audio-Visual and Interactive Media; and Design and Creative Services. The study estimated that there are between 25 000 and 30 000 CCI organisations in South Africa. A random sample of more than 2500 of these organisations was then interviewed by telephone. Results reported here are based on this data.

UNESCO (2009) defines the Visual Arts and Crafts cultural domain as including fine arts (paintings, drawings, sculpture), crafts and photography. They make up 23% of the CCIs in South Africa (4146 organisations), with the biggest number being found in Gauteng (1414) and the Western Cape (1105). In all provinces, Crafts make up the biggest percentage of CCIs within the Visual Arts and Crafts domain.

LOCATION: Percentage of Visual Arts & Craft CCIs by Province

	National	EC	Free State	Gauteng	KZN	Limpopo	Mpumalanga	Northern Cape	North West	Western Cape
Visual Arts & Crafts (Total)	23	19	30	13	35	28	26	18	17	23
Fine Art	4	3	6	4	4	4	4	2	2	5
Photography	4	4	7	2	7	2	3	2	2	4
Craft	15	12	18	7	24	22	19	14	13	14
Number of VA & P organisations*	4146	296	164	1414	707	162	170	56	71	1105

*Using mid-range universe estimates



Figure 1: Map of Visual Arts and Crafts CCIs in South Africa

Legal Status and Age of Visual Arts and Crafts CCI

Legal status	Unregistered	37%
	Close Corp.	32%
	Private	10%
	Non-Profit	10%
	Public	2%
	Other	9%
Age	3 or less years	12%
	4-8 years	32%
	9-12 years	17%
	13-16 years	11%
	17+	27%
	Unsure	1%

In terms of legal status, more than a third of Visual Arts and Crafts CCI were unregistered, a much higher percentage than in the other domains. The next largest group (32%) were Close Corporations (CC). Most organisations in this domain were more than 4 years old, the biggest group being in the 4 – 8 year category (32%), with an average age of 12.6 years (compared to the national average for all domains of 13.6 years old).

Nationally, Visual Arts and Crafts CCI directly employ about 18 400 people. Annual turnover of CCI in this domain is R2.05 billion.

Overall, the CCI contribute R90.54 billion to the GDP of South Africa (2.9%). The Visual Arts and Crafts Domain contributes R2 billion (2.26%) of this.

Demographics of owners and workers in Visual Arts and Crafts CCI owners & Employees by sub-groups

Theme	Variable	Crafts (n = 279)	Fine Art (n = 133)	Photography (n = 86)	
Ownership	Race of principal owner/s: Percentage who are black, coloured or Indian	80%	49%	54%	
	Sex of principal owner: Percentage who have at least one female owner	72%	47%	33%	
	Age groups of principal owner/s: Percentage in each category (adds up to > 100 because of multiple owners)	18 – 24	7%	9%	5%
		25 – 34	24%	21%	26%
		35 – 44	38%	33%	35%
		45 – 54	33%	26%	16%
		55+	26%	24%	37%
Nationality of principal owner: Percentage who are South African	90%	92%	92%		
Percentage of CCI in each category who are a member of a professional body	19%	17%	9%		
Employees	Number of employees (including the owner/s): Averages and percentage of workforce in this category (in brackets)	Full Time	4 (66%)	3.2 (65%)	1.8 (50%)
		Part Time	2 (32%)	1.3 (22%)	1.5 (42%)
		Contract	0.2 (1%)	0.6 (13%)	0.3 (8%)
	Percentage of workforce in this category	Entry/Junior level (0 – 2 years' experience)	19%	21%	23%

		Intermediate (2 – 5 years' experience)	20%	24%	27%
		Senior (more than 5 years' experience)	61%	55%	51%
	Percentage of workforce who have undertaken formal/informal training (add up to more than 100 because some employees have training in both categories)	Formal, certified training	38%	35%	36%
		Informal/uncertified training	39%	34%	35%
Turnover & Markets	Average monthly turn-over (not all provided data)		R14 119	R15 918	R16 550
	Main Market (Percentage in each sub-category)	SA Households/individuals	82%	74%	83%
		Households/individuals outside SA	7%	8%	0%
		Other firms/organisations	5%	8%	11%
		Public Sector/Government	6%	101%	11%
Percentage of each category who sell any of their product/services internationally			19%	30%	12%

The majority (67%) of Visual Arts and Crafts CCI's are owned by black, coloured or Indian people, especially in the case of Crafts. More than half (58%) of Visual Arts and Crafts CCI's have at least one woman owner. Most owners are South African citizens and are older than 35. A minority of organisations are a member of a professional body.

Including the owner/s, Visual Arts and Crafts CCI's employed an average of 3.4 full-time staff, 1.5 part-time staff and 0.4 contract staff per organisation. Sixty-four percent of employees were full-time, 28% part-time, and 8% on contract or freelance. Employment numbers were highest in the Crafts sector, which also employed the greatest proportion of full-time workers. More than half the workers in all sub-sectors in this domain had more than 5 years' experience in the industry. About a third had formal or certified industry training.

Average monthly turn-over (calculated for those who were willing to provide data) was an overall average of R14 770, highest for Photography (R16 550). The main market for all Visual Arts and Crafts CCI's was South African households or individuals. Fine Arts CCI's had the most diversified markets which included sales to the public sector/government (10%), households and individuals outside SA (8%) and other firms (8%). Fine Arts organisations were also most likely to sell some of their products and services internationally (that is, selling directly to buyers outside of South Africa).

Challenges identified by CCI's in this sector were mostly around funding and budget constraints, inconsistent and unreliable business, and the high costs of operating and maintaining an office. Opportunities and determinants of success most often mentioned were the growing demand for, and interest in, products and services, the ability to share skills and expertise with surrounding communities and to create jobs. The benefits of good networking, which helped to grow business through exposure to new ideas and referrals to new clients, were also mentioned.