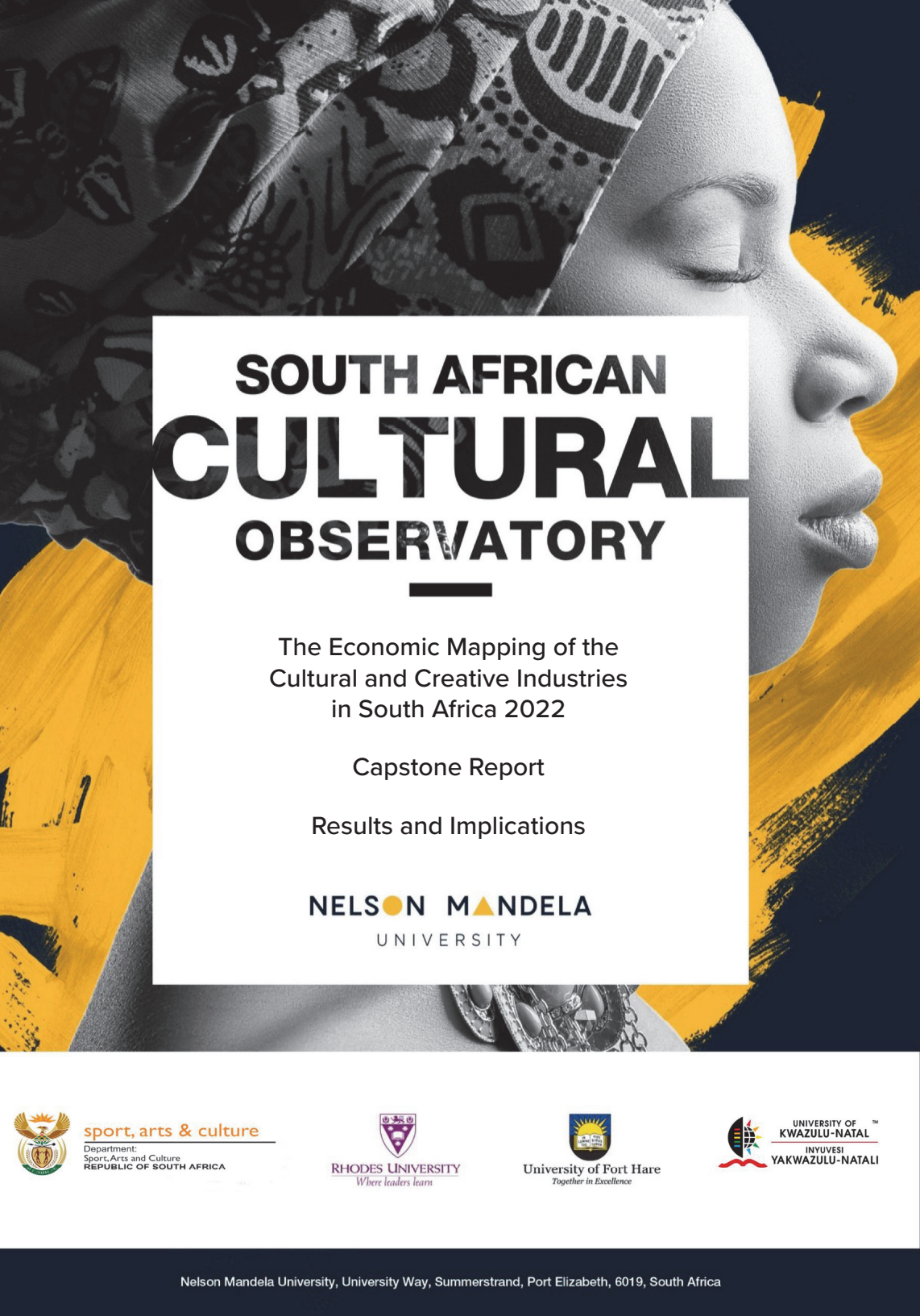




SOUTH AFRICAN CULTURAL OBSERVATORY

The Economic Mapping of the
Cultural and Creative Industries
in South Africa 2022

Capstone Report

Results and Implications

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Table of Abbreviations

AFS	Annual Financial Statistics
AU	African Union
BRICS	Brazil, Russia, India, China, and South Africa
CCI	Cultural and Creative Industries
dtic	Department of Trade, Industry and Competition
EU	European Union
EU28	28 countries of EU
GDP	Gross Domestic Product
GFCF	Gross Fixed Capital Formation
GVA	Gross Value Added
IIT	Intra-industry trade
ILO	International Labour Organization
IO	Input-Output
LMDS	Labour Market Dynamics Survey
LMDSA	Labour Market Dynamics South Africa
NAFTA	North American Free Trade Agreement
PCR	Personal, Cultural and Recreational
PESA	Political Economy Southern Africa
QLFS	Quarterly Labour Force Survey
SACO	South African Cultural Observatory
SADC	Southern African Development Community
SAM	Social Accounting Matrix
SARB	South African Reserve Bank
SDGs	Sustainable Development Goals
TCI	Trade complementarity indices
UNESCO	The United Nations Educational, Scientific and Cultural Organization
USMCA	The United States–Mexico–Canada Agreement

1 | INTRODUCTION



In addition to the important social and cultural values that cultural and creative activities contribute to the identity and wellbeing of South Africans, the contribution of the Cultural and Creative Industries (CCIs) to economic growth, employment, and international trade has also been increasingly acknowledged.

In South Africa, this occurred through the “Mzansi’s Golden Economy” initiative, under which the South African Cultural Observatory (SACO) was founded.

In its 2019 presentation to Cabinet on South Africa’s Re-imagined Industrial Strategy, the Department of Trade, Industry and Competition (the dtic) pointed to the potential the CCIs have for, *inter alia*, employment creation, skills development, promoting social cohesion, raising the country’s profile abroad and supporting the domestic tourism industry (the dtic, 2019). Prioritisation of the CCI sector as one of seven focus areas in the country’s revised industrial policy¹ is intended to address the challenges and constraints that need to be overcome to allow the sector to reach its full potential. The development of Master Plans for each priority sector aims to promote a collaborative approach among all stakeholders to address the needs of that sector in its entirety.

One of the flagship products of the SACO has been the mapping of the CCIs on a national level (SACO, 2018; 2020). SACO is a national research project of the Departments of Sport, Arts and Culture, established in 2015. While not themselves policy documents, mapping studies aim to provide reliable, policy and sector relevant information about the economic value of the CCIs in South Africa that can be used to inform sector development and policy.

A focus of the previous mapping study (presenting data up to 2018) was on the contribution of the CCIs to the United Nations Sustainable Development Goals, reporting through the “Thematic Indicators for Culture” released in 2019. While this remains an important part of the report, a new focus is on the impact that the COVID-19 pandemic has had on the CCIs, both internationally and in South Africa. Reasons for the particularly negative impact of the pandemic on the CCIs include the project-based production mode in many parts of the sector, the prevalence of in-person operation, and the higher levels of freelance and informal occupations. By tracking the impact of the pandemic and the start of the recovery as lockdown restrictions eased, the 2022 mapping study aims to provide information that can be used to design effective support interventions and adaptation strategies.

¹ The seven national priority sectors are as follows: Sector 1: the Industrial Sector (Automotive, Clothing Textile Leather and Footwear, Gas Chemicals and Plastics, Renewables/Green Economy, Steel and Metal Fabrication); Sector 2: Agriculture and Agro-processing; Sector 3: Mining (Minerals and Beneficiation); Sector 4: Tourism; Sector 5: High Tech Sectors/Knowledge based (Digital Economy, ICT and Software Production, Health Economy, Defence Economy); Sector 6: Creative Sector; Sector 7: Oceans Economy (the dtic, 2019: 23).

This “Capstone” report brings together the main findings and implications of the 2022 CCI Mapping Study. The data presented is based on the extensive and detailed research contained in each chapter of the mapping study, which gives more detail on the technical methods and data used, the international context, and detailed data analysis to draw up a national picture of the creative economy in South Africa. The chapters are listed below and are available for download on the SACO website.

Chapter 1: The Macroeconomic Impact of the CCIs in South Africa

Chapter 2: Cultural Employment and Transformation

Chapter 3: International Trade in Cultural Goods and Services

Chapter 4: Provincial Profiles

Chapter 5: The South African Creative Economy in Historical Context

2 | GOALS AND METHODS



The overall goal of the CCI Mapping Study 2022 is to provide updated information on how the cultural and creative industries contribute to the economy of South Africa in terms of Gross Domestic Product (GDP) and GDP growth, employment and transformation, and international trade.

This report is an update of previous mapping studies published by SACO in 2018 and 2020.

In addition to providing aggregated information about the sector, the research also analysed specific cultural domains (as defined by the UNESCO Framework for Cultural Statistics, 2009), and to identify areas that are showing potential, and those that are facing challenges, so that policy implications can be identified. A special focus of the 2022 mapping study is the impact of the COVID-19 pandemic on different parts of the sector, adaptation strategies used, and tracking the start of the recovery as lockdown regulations eased.

2.1 Research methods

The three main quantitative reports of the 2020 Mapping Study use a variety of methods and data sources to track the CCIs in South Africa. Using more than one method of research increases the reliability of the findings, as well as providing more detailed information, since not all methods can be used to answer all questions. Another strength of the mapping study is the use of official, national data, following an internationally accepted methodology (the UNESCO Framework for Cultural Statistics). Unlike survey data, national data are more reliable, allow analysis over time, and produce internationally comparable data.

An important point to note is that some of the results presented in the 2022 mapping study are not directly comparable with those in the 2020 study because of the “rebasing” of the GDP measures in 2021 by Statistics South Africa, which revealed important changes in the structure of the South African economy which also affected the size and composition of the CCIs. Since the structure of economies changes over time, governments validate GDP calculations by rebasing periodically², to reflect these structural changes. The change means that the weight (importance) of some sectors changes in the measurement of GDP. Rebased GDP models were used to calculate the contribution of the CCIs to South Africa’s economy. Table 1 gives a brief outline of the different methods used in the first three chapters of the mapping study. Each method is more fully described in the individual chapters (available on the SACO website). To give a brief overview:

² Stats SA generally rebases every five years. Rebasing was done in 1999, 2004, 2009, 2014 and 2021 (a bit longer for the latest one because of the pandemic).

Table 1: Comparison of the methods used in Chapters 1–3

	Chapter 1. Macroeconomic Impact of the CCI	Chapter 2. Cultural Employment	Chapter 3. International Trade in Cultural Goods
METHODS	Partial equilibrium modelling, based on Cultural and Creative Industries Satellite Account, embedded into a Social Accounting Matrix for South Africa.	Analysis of primary data.	Analysis of secondary data.
DATA	Annual Financial Statistics (AFS); Supply and Use Tables; Final Social Accounting Matrix; Household Income and Expenditure Survey; Labour Market Dynamics Survey; SARB Quarterly Bulletins.	Quarterly Labour Force Survey; Labour Market Dynamics Survey.	Comtrade Data via Trademap; South African Reserve Bank; ITC-WTO-UNCTAD Trade in Services Database.
ADVANTAGES	Direct and indirect GDP impacts can be estimated for each CCI domain and for the sector overall; the SAM allows an estimation of household earnings by domain and overall; employment at different levels of skill can be estimated.	Gives a very detailed view over a long time period of people working in all three parts of the Cultural Trident; includes both the formal and informal sectors.	Cultural goods trade is reported in the same way internationally, so it allows comparisons of bilateral trade (trade flows between two countries). This can be helpful in identifying potential trading partners and strategic sectors.
DISADVANTAGES	Does not include informal sector (not reported for tax purposes); does not include cultural workers outside of the cultural industries; is based on econometric modelling (not direct data) so provides estimates.	Lack of detailed industry-level data makes support (non-cultural) occupations in the CCIs difficult to calculate.	Trade in cultural services is currently not reported in such a way that bilateral trade flows can be tracked. As cultural goods dematerialise, this will become an increasing problem. Trade data is reported in nominal US\$, and values do not necessarily reflect volume.

Chapter 1, on the **macroeconomic impact of the CCIs**, uses national primary data from a number of sources (such as the Household Income and Expenditure Survey, Supply and Use Tables, and the System of National Accounts). The internationally accepted best-practice method for measuring the economic impact of the CCIs is to construct a Cultural Satellite Account. A Cultural Satellite Account was developed for South Africa, based on the Input-Output (IO) tables of the System of National Accounts produced by Statistics South Africa. Stats SA does not report on the CCIs as a separate sector: CCI activity is included but is reported on as part of other sectors. To make the CCIs “visible” the national IO table has to be disaggregated to extract cultural economy activity. A new South African CCI-IO table was derived using the methods described in Chapter 1 giving an IO table comprising 85 industries with the additional six UNESCO CCI domains.

The great advantage of this method is that the direct economy-wide contribution of the cultural sector can be estimated, as well as linkage, or multiplier, effects on other parts of the economy. Detailed modelling also provides information on factors of production (labour and capital), the distribution of household earnings (Gini coefficients – an innovation of the 2022 study), and historical information of the economic performance of each domain over time.

A challenge is that it may underestimate the contribution of the informal sector, since the AFS is based on financial reporting for tax purposes. Cultural employment figures in this chapter are estimates calculated using employment multipliers, not analysis of direct survey data (as found in Chapter 2), and do not include people in cultural occupations who work in non-cultural industries. Figures in this report should thus be considered a conservative estimate of GDP contribution and employment creation.

Chapter 2, on **cultural employment**, makes use of primary household survey data collected by Statistics South Africa. It can be used to give a very detailed view of the demographics and working conditions of people in cultural occupations. Since the survey was done at household level, it includes people working in both the formal and informal sectors. It also covers people in cultural occupations, but who work outside of the cultural industries (for example, a designer in a car manufacturing company). However, the lack of detailed industry-level data in this data set makes it difficult to estimate the number of people who are employed in cultural or creative firms, but in support occupations (for example, an accountant in a film company). Another challenge is that, at the time of the research, annualised Labour Force Survey data were not yet available for 2020. Quarterly data are thus used to track changes in cultural occupations between 2019 and 2020, which has smaller sample sizes (and is thus less reliable and detailed) than the annual data.

Chapter 3, on **international trade in cultural goods**, used secondary data on the value of imported and exported cultural goods. Previous SACO reports have focused on South Africa's cultural trade with BRICS, selected AU member states and the EU. Earlier studies identified the United States–Mexico–Canada Agreement (USMCA)³ and the rest of Africa, particularly the SADC region, as significant regional trading partners in cultural products. This chapter examines South Africa's cultural goods trade with SADC and USMCA in more detail in a comparative regional context and, in addition, it considers the impact of the COVID-19 pandemic on the country's recent cultural trade flows.

The advantage of these data sets is that it allows one to analyse the trade flows between individual countries or trading blocs by domain, and over time. A challenge with this data is that it is not yet possible to track trade in cultural services, which is becoming an increasingly important part of cultural trade, in much detail. However, data from the South African Reserve Bank can be obtained for some broad categories (such as Charges for the use of intellectual property; Telecommunications, computer and information services; Personal, cultural and recreational services; and Advertising and market research services). The ITC-WTO-UNCTAD Trade in Services Database also has data for South Africa's cultural trade which include some relevant sub-categories (such as Audio-visual and Related Services; and Heritage and recreational services) which provide useful supplementary data.

Each report makes it clear which methods are being used and includes detailed technical appendices. This Capstone report also explains the differences between the results, highlights and analyses the most important figures, and explains the implications of the findings. In all cases, differences in the findings between the reports can be logically explained, and the results of the various reports, although not exactly the same, support each other. Findings can thus be regarded as valid and reliable.

2.2 Definitions and indicators

Although South Africa does not yet have an officially recognised definition of the CCI, many policy and discussion documents, such as the Revised White Paper on Arts, Culture and Heritage (2019) seems to be moving towards adopting the UNESCO system. As in many countries, South Africa has broadened its definition of the CCI over time, with early reports, such as the Cultural Industries Growth Strategy, defining the cultural industries very narrowly to include only the music, film and video, publishing and craft sectors. The defining characteristic, following the UNESCO definition, is the *symbolic* nature of the goods and services produced. It is thus important to note that

3 This was formerly the North American Free Trade Agreement (NAFTA).

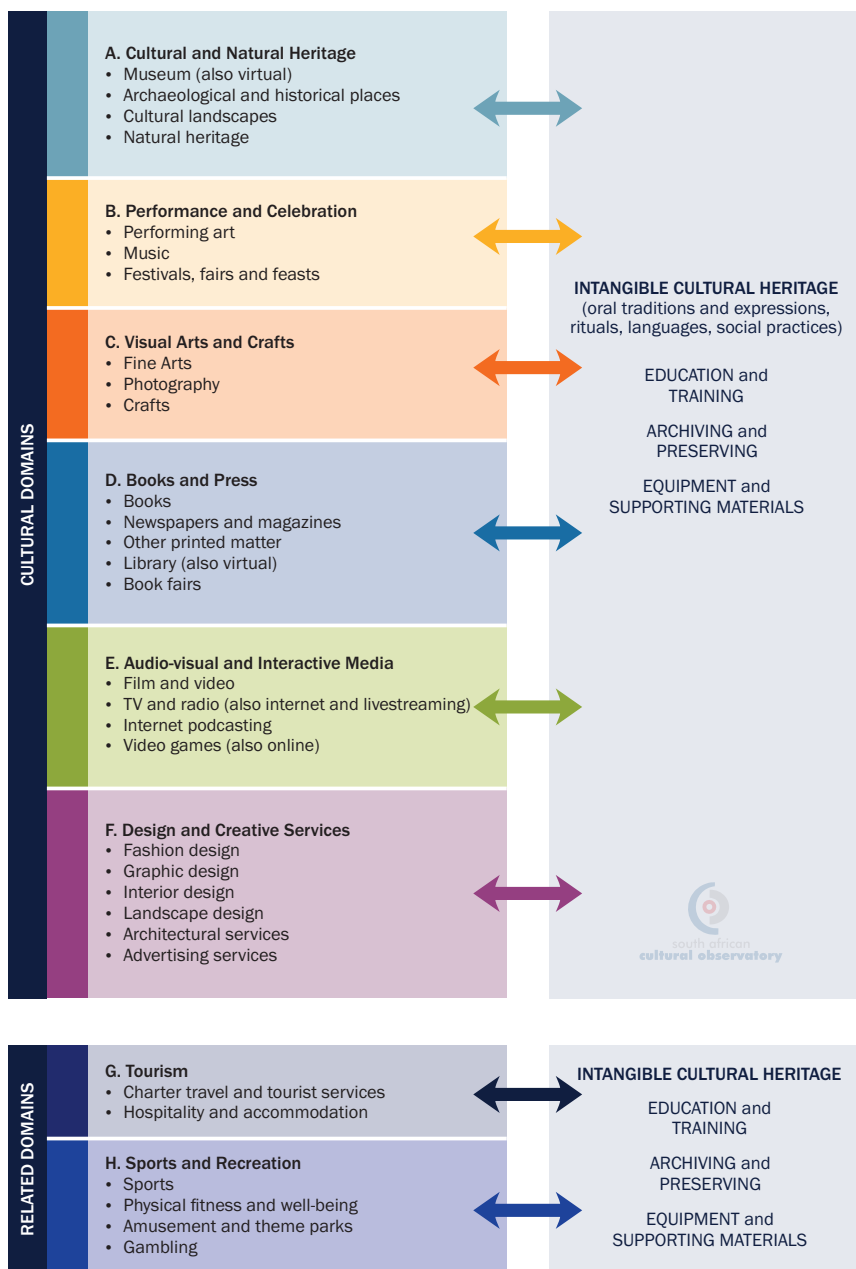


Figure 1: The UNESCO Framework for Cultural Statistics (2009)

the definition of the CCIs used in this report includes not only the traditionally recognised (or core) “cultural” occupations and industries, but also the more commercial, for-profit, “creative” sectors, as described by the UNESCO (2009) Framework (Figure 1).

In November 2019, UNESCO released their “Thematic Indicators for Culture in the 2030 Agenda” (UNESCO, 2019). This document demonstrates how the cultural sector fits into the Sustainable Development Goals (SDGs) framework and describes how countries can use qualitative and quantitative indicators to measure the contribution of the CCIs to the SDGs (Figure 2).

The Thematic Indicators are divided into four sub-categories: *Environment and Resilience*, *Prosperity and Livelihoods*, *Knowledge and Skills* and *Inclusion and Participation*. ‘Cultural Employment’ fits into the *Prosperity and Livelihoods* sub-category, along with ‘Culture in GDP’ and ‘Trade in Cultural Goods and Services’, which are also addressed as part of the SACO 2020 mapping study. The *Prosperity and Livelihoods* sub-category feeds into SDGs 8 (Decent Work and Economic Growth), 10 (Reduced Inequalities), and 11 (Sustainable Cities and Communities).



Figure 2: UNESCO Thematic Indicators for Culture 2030

The CCI Mapping Study provides information on Indicators 6 (Culture in GDP), 7 (Cultural employment), and 10 (Trade in cultural goods and services). In addition, the GDP, employment and international contributions of each of the six main UNESCO Cultural Domains (Figure 1) are analysed. Finally, the main findings and their implications are discussed.

3 | THE CONTRIBUTION OF THE CCIs TO SOUTH AFRICA'S ECONOMY



3.1 GDP and Growth

GDP is the value of all finished goods and services produced in a country in a year and is used to track changes in production over time. The main purpose of Chapter 1 was to measure the contribution of the CCI to the South African economy in 2020. The contribution of the CCI is measured using Gross Value Added (GVA). GVA is the value added to all goods and services produced in a country in a time period (excluding intermediate uses to avoid double counting). It is essentially the same as GDP, except that it does not include taxes and subsidies. Important information on growth rates for the CCI overall, and by domain, is also included.

To do this, national data were used to determine CCI production. Production value, or turnover, is the amount of money taken in by a business in a year. Figure 3 gives the production values for each domain, as well as for the transversal domain of cultural education and training (which is part of the UNESCO Framework).

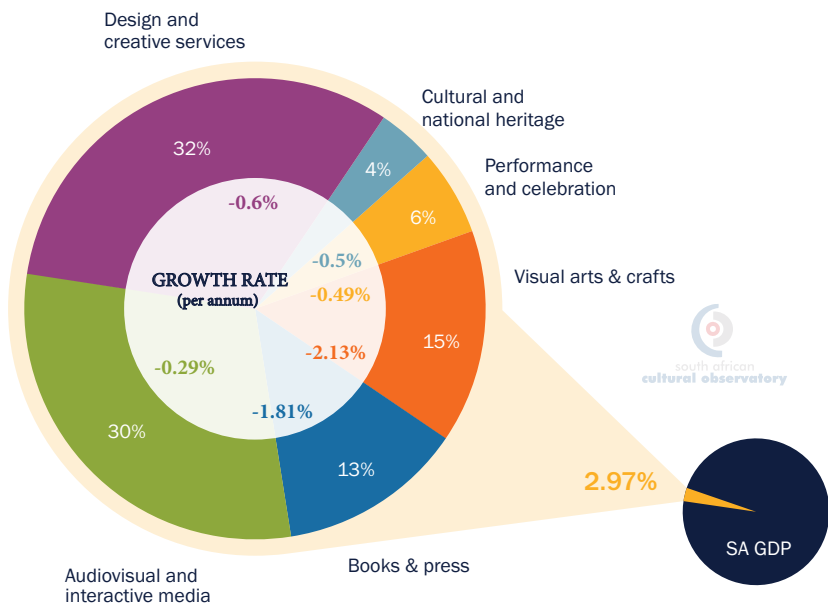


Figure 3: GVA Contribution per CCI Domain (at current 2020 prices)

Perhaps one of the important findings of this chapter is the unexpected size of the CCIs relative to the South African economy. The sector is relatively larger than previously estimated. Given its size, the importance of its inputs to other sectors, and its ability to provide jobs, the sector needs to be fostered and developed.

Using the rebased 2015 GDP data, the total GVA of the CCIs was R161 billion in 2020. This represents just under 3% of South Africa's total economic production in 2020 and makes the sector approximately the same size as agriculture.

As found in previous mapping studies, the largest domains in terms of contribution to output are Design and Creative Services (R51 billion in 2020, 32% of the contribution to GDP), and Audio-visual and Interactive Media (R48.4 billion in 2020, 30% of the contribution to GDP). The dominance of these domains is expected, since they involve the commercial application of cultural and creative content, such as in film and television, video games, fashion design, architecture and advertising.

The next largest domains are Visual Arts and Crafts (R23.4 billion in 2020, 15% of the contribution to GDP), and Books and Press (R21.5 billion in 2020, 13% of the contribution to GDP). These are followed by the smaller domains of Performance and Celebration (6%) and Cultural and Natural Heritage (4%).

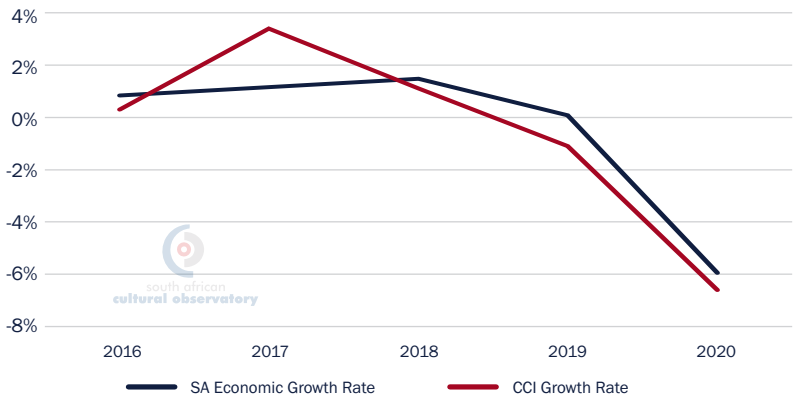


Figure 4: South African economic growth and CCI performance

The performance of the CCIs need to be measured against a background of slowing South African economic growth over time. As found in previous mapping studies, and in the international literature, the creative economy grows quickly when the economy is doing well but tends to decline more quickly than other sectors when economic growth slows. The CCIs generally performed better in 2017 than the South African economy. However, the growth rate for the sector slowed down relative to the South African economy from 2018.

3.2 Domain-level analysis

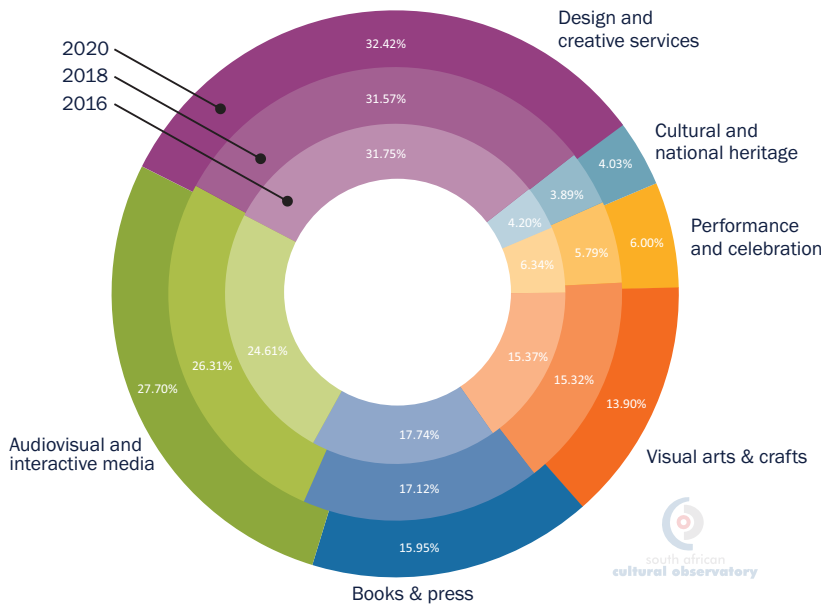


Figure 5: GVA per Cultural Domain (percentage of total CCI output) 2016, 2018 and 2020

Figure 5 shows the relative sizes of the domains during 2016 (the inner band of the doughnut), 2018 and 2020 (the outer band of the doughnut).

The Visual Arts and Crafts domain comprises just under 14% of South Africa's CCI to the country's GDP. However, the sector is shrinking, and the study found a drop from just over 15.4% in 2016 to 13.9% in 2020. Although part of the drop can be attributed to the COVID-19 induced recession, there are other factors. Although crafts play a small role in the CCI-economy and they may be under-reported because of the informal nature of the sub-sector, they do have an important role in providing an income for people with lower levels of formal education.

The Books and Press domain has also been shrinking over the past few years. Part of this can be attributed to the fact that there has been a shift to digital books that are currently being imported. However, reading competes with many other forms of entertainment and therefore the demand for books has decreased. South Africa needs to develop a reading culture, especially for South African stories.

The Audio-visual and Interactive Media domain has grown rapidly as CCI consumers' tastes have changed and adapted to new technologies that are available. Design and Creative Services provides creative services mainly to the corporate sector. These are also the domains that have the greatest potential to benefit from digitisation: Design and Creative Services and Audio-visual and Interactive Media have grown relative to the other domains. Books and Press, which has been suffering a steady downward trend over the past few years, shrank relative to the other domains from 17.7% in 2016 to just under 16% in 2020.

Analysis of changes in CCI domains over time showed three general groups: the first group, Cultural and Natural Heritage and Performance and Celebration, are relatively small in terms of their contribution to GDP but have strong roots and assets that have been built up over the years. They are growing slowly and must be preserved and supported to continue this growth in the future.

The second group includes the Visual Arts and Crafts and Books and Press domains which are in the middle in both the size of their contribution to GDP and their growth. A concern is that the GDP contributions of both these domains have fallen in recent times, even before the COVID-19 pandemic of 2020.

The third group, consisting of the Audio-visual and Interactive Media, and Design and Creative Services, are growing faster and are the two largest domains.

3.3 Total, indirect and induced economic impacts: multipliers

In addition to the direct impact of productive activities of the creative sector, the CCIs also have indirect and induced impacts on other parts of the economy. A multiplier is a factor that measures how much a monetary inflow that comes from outside a sector (exogenous variables) changes the endogenous variables (inside the sector itself). The affected variables could include output, GDP, GVA, income, employment, profit, taxes etc. In other words, it is the additional economic benefit that accrues to an area from money being spent (generally referred to as a shock) in the local economy. The size of the multiplier depends on the structure of the economy, including the degree of labour or capital intensity, the source of the raw material or other inputs and the propensity to spend or save.

The Type I output multiplier (or direct and indirect multipliers) for a particular industry is defined as the total of all outputs from each domestic industry required in order to produce one additional unit of output. This gives the direct and indirect (backward and forward linkages). Type II multipliers include the knock-on effect from household income and spending and are therefore larger than Type I multipliers.

Table 2: CCI Type I and II output multipliers

	Type 1 Output Multipliers	Type 2 Output Multipliers
Cultural and Natural Heritage	1.850	3.740
Performance and Celebration	1.894	3.748
Visual Arts and Crafts	2.092	3.700
Books and Press	1.903	3.814
Audio-visual and Interactive Media	1.891	4.170
Design and Creative Services	1.881	4.353

For example, if foreign tourists come to South Africa and spend an additional R1 million on Cultural and Natural Heritage products and services, the boost given to the economy in direct and indirect output impacts would be equal to R1m multiplied by 1.850 (the multiplier for this domain), which would be equal to R1.85 million (the total impact on the GDP of South Africa as a result of the original R1m increase in spending).

However, as the output increases, so do the number of workers required and the profits of the owners. These funds are saved, invested or spent in other sectors. This additional spending (profits and compensation) is referred to as the “induced impact.” The Type I multipliers plus the induced impact give Type II impact or the total impact that can be expected from the additional turnover.

Using the same example given above, if foreign tourists come to South Africa and spend an additional R1 million on Cultural and Natural Heritage domain products and services, the boost given to the economy through the total output impacts (direct, indirect and induced) would equal R3.74 million.

The Design and Creative Services domain has the highest multipliers, followed by Audio-visual and Interactive Media. In considering the economic value that the CCIs represent, direct GVA is important, but it should also be considered that increases in spending on the CCIs have large knock-on (multiplier) impacts on other parts of the economy.

3.4 Impacts on household income: the Gini coefficient

The CCI SAM provides information on household income earned per industrial sector as well as per CCI domain. Although overall income is an important part of each domain’s contribution to the national GDP, this section analyses distribution of the income derived by households from each domain in which they work according to their income decile.

Income deciles are derived by ranking all households in an economy from poorest to wealthiest (in terms of their income) and then dividing them into 10 groups, with an equal number of households in each group. To examine the distribution of household income in each domain, the Gini coefficient is calculated for each domain according to the decile in which the household is included.

The Gini coefficient (also called the Gini index or Gini ratio) is a statistical measure of economic inequality in a population and can be used in the analysis of income distribution within a sector. The coefficient can take any value between 0 to 1 (or 0% to 100%). A coefficient of zero indicates a perfectly equal distribution of income, and a coefficient of one represents a perfect inequality when one household in a population receives all the income.

South Africa is acknowledged as having one of the most unequal distributions of household income in the world (of those countries who measure inequality in this way). In 2006 the country had a *per capita* expenditure Gini coefficient of 0.67, dropping to 0.65 in 2015. The top 10% of the population spent 8.6 times more than the bottom 40% in 2006 and 7.9 in 2015 (Stats SA, 2019). The origins of this inequality can be traced back to apartheid, but the current cause is the country's high unemployment: without the social grant system inequality would have been far worse. Increasing employment would have a positive impact. Nevertheless, even among employed South Africans the Gini coefficient is too high.

Using the CCI SAM it is possible to determine the Gini coefficients for each of the CCI domains: the higher the ratio, the more unequal is the distribution of income in each domain. Not surprisingly, the domain with the most unequally distributed income is Visual Arts and Crafts. This domain includes both fine artists whose works sell internationally, sometimes for very high prices, and crafters who may be operating informally on a small scale. 50% of the poorest households in this domain earn only 8% of the total income. Audio-visual and Interactive Media has one of the lowest Gini coefficients in the sector.

Table 3: Gini coefficients per domain

Domain	Gini
A: Cultural and Natural Heritage	0.60292
B: Performance and celebration	0.63555
C: Visual art and crafts	0.68988
D: Books and press	0.60953
E: Audio-visual and Interactive Media	0.57861
F: Design and Creative Services	0.58431
Transversal domain: Education and Training	0.61708

3.4 Demand-side considerations

Until now this chapter has focused on the supply side of the economy. However, the demand side is equally important. The types of products and services that consumers purchase changes over time. The South African Reserve Bank provides information on four types of spending relevant to the CCI: durable goods, semi-durable goods, non-durable goods and services.

The largest category is “Recreational, entertainment and educational services.” This category consists of spending at cinemas, parks, museums, and theatres, and also includes subscriptions to television services and licences and the hiring of equipment. Although this is the largest category, it also experienced rapid growth from 1997. With the advent of television services such as Netflix, the spending on these imported digital services has increased. Audience development and careful negotiation with online platforms needs to be undertaken to ensure that more South African content remains visible and is consumed via international online platforms.

Durable recreational and entertainment goods (including audio-visual, photographic and communications equipment) have exhibited an increase since 2003. With the first wave of the COVID-19 pandemic in early 2020, consumers changed, or were forced to change, their consumption patterns as business models changed and government regulations were implemented. There is a clear drop in the consumption, of particularly of services, but also of non-durable and semi-durable recreational and entertainment goods. Durable recreational and entertainment goods, however, continued on an upward trajectory. This trend can be better seen when the figures have been converted to indices (2015 equals 100) in Figure 6.

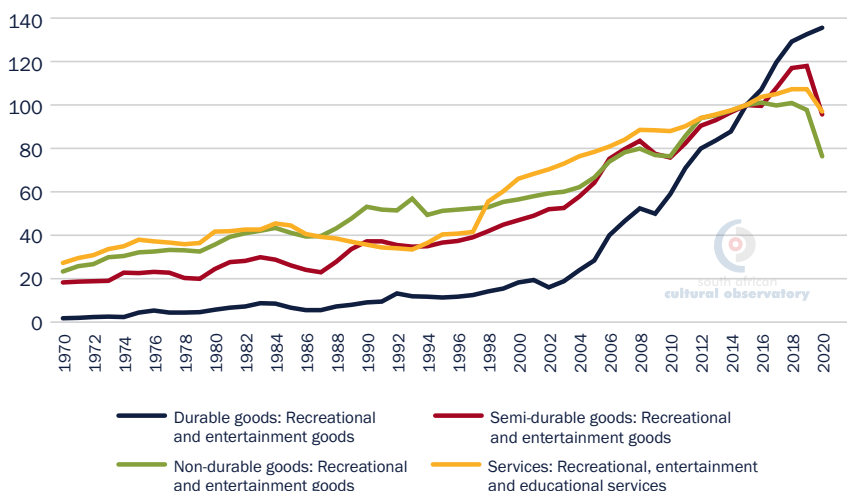


Figure 6: Index of consumption expenditure of recreation and entertainment goods and services (2015=100)

Source: SARB 2021 and Quantec 2021

From the demand side, households are the largest consumers of CCI products and services. Government, in common with most governments in the world, does not consume a large proportion of South Africa's CCI products or services. Gross Fixed Capital Formation (GFCF) gives an indication of investment in productive capacity and is also an important contributor to final demand. Architectural and advertising services play an important role in the development of the country. However, GFCF in South African CCIs is volatile and depends on the state of the economy and especially on the confidence that investors have in the future.

Figure 7 combines the demand and supply sides of the creative economy to show how the CCI ecosystem works, and the size of the financial flows in each part of the network. The components on the left-hand side generally indicate the contribution to the supply side of the CCI-economy, while those on the right-hand side show the demand for CCI products and services. It is through such analysis that South Africa's creative economy can be mapped and understood in order to design effective evidence-based policy.

3.5 The Creative Economy Ecosystem

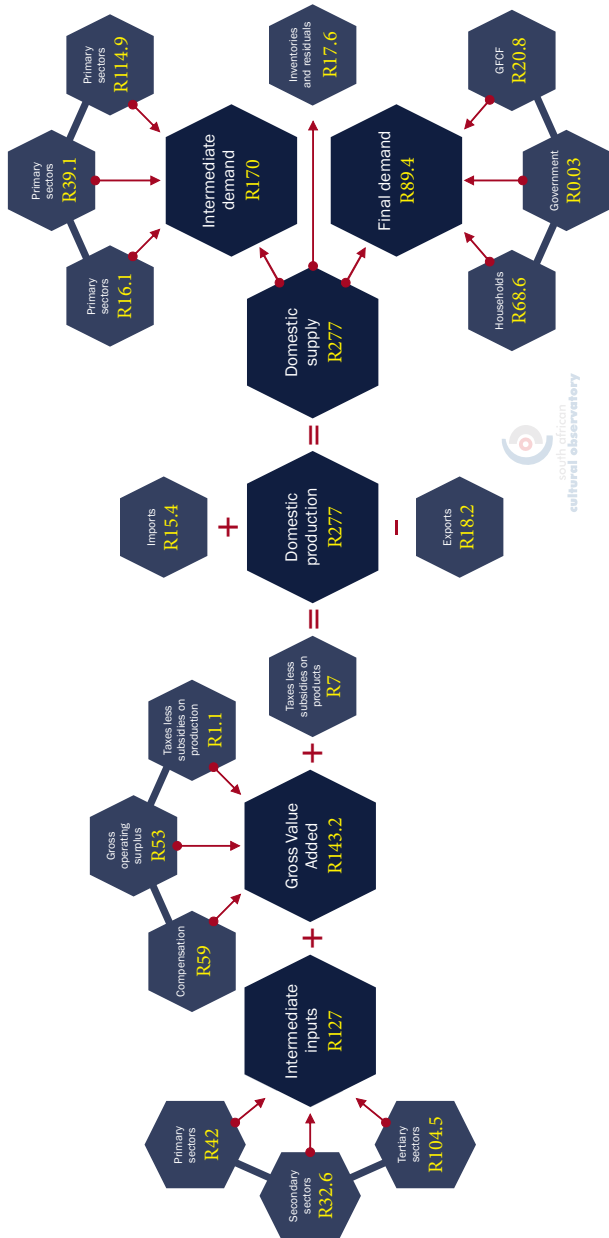


Figure 7: The Creative Economy Ecosystem

3.6 Provincial GVA

The map (Figure 8) gives a comparative overview of the percentage contribution of each province to South Africa's creative economy, measured in terms of GVA (in Rands).

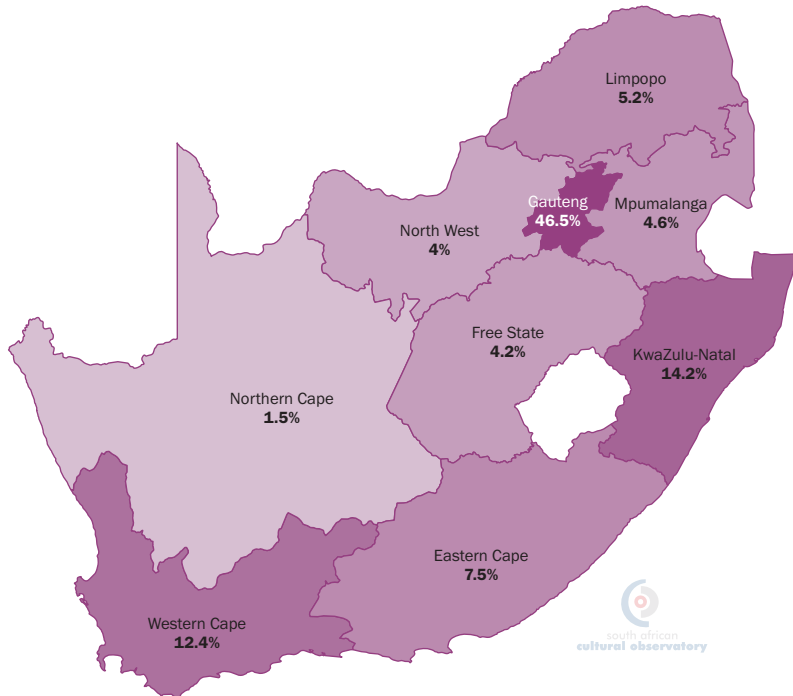


Figure 8: The percentage contribution of each province to South Africa's creative economy (GVA)

As found in other countries, one region (Gauteng Province) is clearly dominant in terms of creative economy activity in the country. It contributes 46.5% of the GVA of the CCIs. The Western Cape (12.4%) and KwaZulu-Natal (14.2%) also have significant shares of South Africa's CCI economic activity. Two things are clear from this analysis: Firstly, that the CCIs in South Africa are most likely to cluster in provinces with the larger metropolitan areas; and secondly, that South Africa has a polycentric system, like the US (Kemeny et al., 2019), with more than one creative economy hub.

4 | CCI EMPLOYMENT AND TRANSFORMATION



The cultural economy makes an important contribution to employment and transformation in South Africa. However, the CCIs have been particularly hard hit by the COVID-19 lockdown regulations both internationally and in South Africa. Reasons for this include the particular production and employment characteristics of much cultural and creative sector work, which the chapter identified through an extensive literature review (summarised in Figure 8).

Chapter 2 used the method developed by SACO to measure the size and characteristics of CCI employment in South Africa (Hadisi and Snowball, 2016), which is based on the UNESCO Framework for Cultural Statistics (2009). Data from the Labour Force Dynamics Survey conducted by Statistics South Africa was used to track transformation over time (further analysis of changes over longer periods can be found in Chapter 5).

In addition to updating the previous mapping study information on South African cultural employment, the focus of this chapter is also on the impact of the COVID-19 lockdown on cultural and creative industry occupations in 2020. The Quarterly Labour Force Survey (QLFS) data on cultural occupations in 2020 was compared on a year-on-year basis to 2019 figures, including metrics such as changes in the number and proportion of cultural occupations compared to other occupations, changes in the hours worked, and the differential impact on potentially vulnerable sub-groups (women, Black Africans, freelancers, and informal workers). Changes in quarterly employment rates during 2020 are also tracked to indicate the start of the recovery phase.

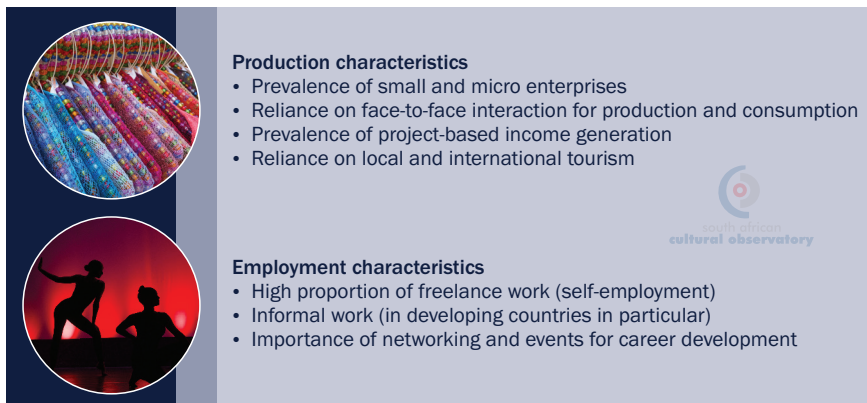


Figure 9: Creative economy attributes that increased workforce vulnerability during the COVID-19 pandemic

The UNESCO (2009) Framework points out that people in cultural occupations may be found in cultural industries, but also in other industries. A useful model for demonstrating this effect is the “Cultural Trident” (Higgs and Cunningham, 2008) which distinguishes between

- A.** Cultural occupations in the cultural industries (such as a director in a film company);
- B.** Cultural occupations in non-cultural industries (such as a designer in a motorcar manufacturing firm); and
- C.** Non-cultural occupations in cultural industries, also called support occupations (such as an accountant in a theatre company).

This definition gives rise to three different ways of expressing employment in the cultural sector:

- **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 (A + B + C);
- **The Creative Industries**, which is a subset of creative economy, focusing on cultural and non-cultural workers, but only those employed in CCIs (A + C); and
- **Creative Occupations**, which is a subset of the creative economy that focuses on cultural work both in, and outside of, cultural firms (A + B).

As found in previous years, many cultural jobs in South Africa are based in the non-cultural industries (such as the example of the designer working in a car manufacturing industry) – 1.9% in 2019 (320 000 jobs). This is an interesting finding, as it suggests that many cultural and creative occupations occur in non-cultural industries, which means that cultural workers are often embedded in non-cultural firms, even if their job or occupation is classified as creative. Relatively few cultural jobs occur in cultural industries – 0.4% in 2019 (approximately 65 300 jobs). It is noteworthy that this is the only part of the creative trident where the proportion of jobs, as well as the number of jobs, has declined since 2017.

Overall, the creative economy accounted for 6% of all jobs in South Africa, which translates into just under 1 million jobs. This is a slight increase from 2017, when the creative economy made up 5.9% of all jobs (approximately 965 000 jobs).

While it is emphasised that, for the cultural industries number, the figure should be treated as a rough estimate, rather than an exact number (because of the lack of detailed industry-level data at 4-digit level), the results nevertheless show that the creative economy in South Africa makes a significant contribution to employment.

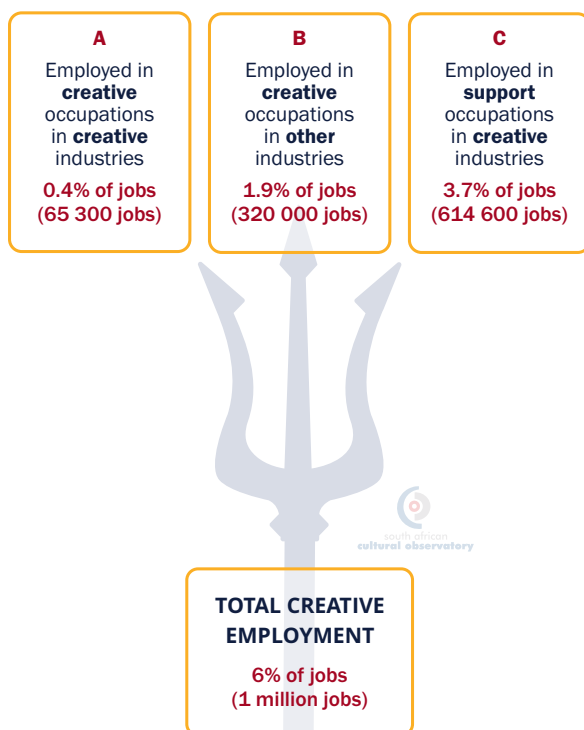


Figure 10: The Cultural Trident for South Africa (2019)

The economy-wide partial equilibrium model (Chapter 1) used employment multipliers to estimate the number of jobs (cultural and non-cultural) in the CCIs (parts A and C of the Cultural Trident). The estimate from this method is that the Creative Industries account for 573 000 jobs. This is somewhat lower than the estimate based on an analysis of the Labour Market Dynamics household survey, which found that the Creative Industries accounted for 680 000 jobs and the Creative Economy (including all parts of the Cultural Trident) accounted for 1 million jobs. What could cause these differences?

Firstly, the economy-wide partial equilibrium model estimate of CCI employment almost certainly underestimates the informal sector, since it is based on formally reported market data. The Labour Market Dynamics household survey includes both the formal and informal sectors. In 2019, 46% of people working in cultural occupations reported working in the informal sector, which accounts for the big difference between the two studies. Secondly, the economy-wide partial equilibrium model does not include cultural workers outside of the cultural industries (part B of the Cultural Trident), which accounts for a further

320 000 jobs in the household survey data. In designating which sectors in the economy are “cultural” or partly cultural, the economy-wide partial equilibrium model took a conservative approach, and did not include, for example, the public sector where cultural occupation categories such as ‘Traditional chiefs and heads of villages’, and ‘Religious and associated professionals’ (which are included as cultural occupations) are found. Taking these differences into account, the differences between the two estimates can be explained.

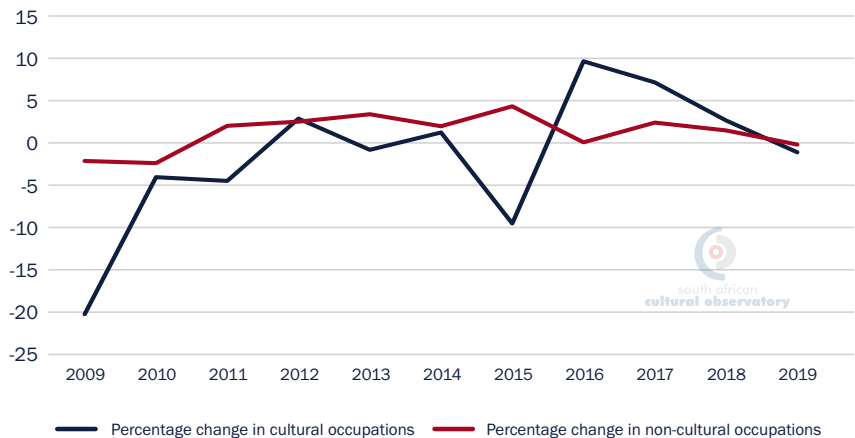


Figure 11: Year-on-year changes in cultural occupations over time (2009–2019)
Source: LMDSA annual dataset, 2019; Authors' own percentage calculations

Figure 11 shows the year-on-year percentage change in the number of cultural occupations (A + B of the trident) compared to the year-on-year percentage change in the number of non-cultural occupations in South Africa. As also found in other countries, 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 declined, but non-cultural employment declined by 2.2%, while cultural employment declined by more than 20%.

Similarly, in response to the slow-down of GDP growth rates in 2015, cultural employment declined sharply. However, cultural occupations grew somewhat more quickly than non-cultural occupations between 2016 and 2018 but declined more quickly than other jobs between 2018 and 2019 as economic growth slowed.

4.1 The impact of COVID-19 on cultural occupations and industries

To examine the impact of the COVID-19 crisis on cultural occupations and cultural industries in 2020, data from the QLFS was used. Data for each quarter of 2020 was compared on a year-on-year basis to data from the same quarter in 2019; and data for each quarter of 2020 was compared to previous quarters of that year. The analysis was done both for people working in cultural occupations, and for people working in cultural industries (which includes people working in non-cultural support occupations).

The data shows that, for every quarter of 2020, there were fewer people in cultural occupations than in 2019. 2020Q2 saw the largest fall (COVID-19 lockdown began in March 2020) because of short-term cancellations and non-renewal of contracts in response to the first hard lockdown.

Compared to non-cultural occupations, cultural occupations suffered larger relative decreases. For example, there were 30.1% fewer cultural occupations in 2020Q2 than in the same quarter of 2019, and only 13.9% fewer non-cultural occupations over this same period (Figure 11). This is likely to be because of the higher proportions of informal and freelance work in cultural occupations, which meant more immediate contract or work agreement cancellation. Much cultural production and consumption also requires a face-to-face mode of operation, which means that restrictions on events and public gatherings had a dramatically negative impact on the sector’s ability to continue with their normal business activities (SACO, 2021).

Both cultural and non-cultural occupations show signs of recovery towards the end of the year, but the negative impact, in relative terms, remains higher for those in cultural occupations.

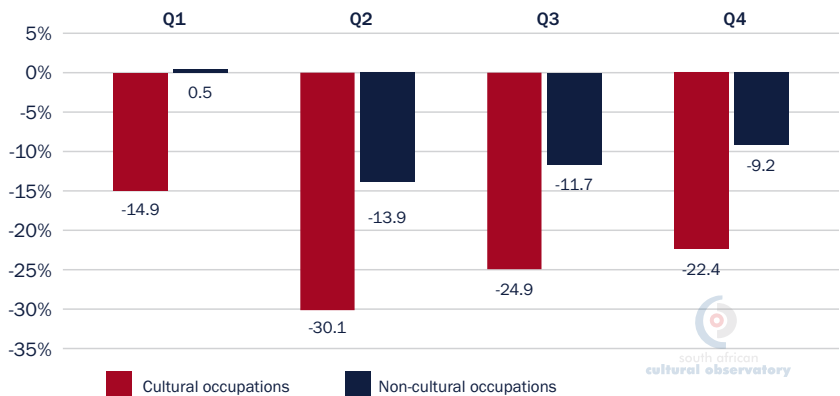


Figure 12: Year-on-year percentage change (2019–2020) in cultural occupations

Thus, while the year-on-year comparison remains negative for all quarters in 2020, there do seem to be signs of recovery in Quarters 3 and 4 as the lockdown eased, and as some adaptation (such as moving work online) took place. By 2020Q4 there were around 295 000 people working in cultural occupations, compared to nearly 380 000 in 2019Q4 (a 22% year-on-year decline in cultural occupations, or 85 000 jobs lost between 2019Q4 and 2020Q4).

International literature has generally found that the COVID-19 recession has been worse for women than for men. There is evidence both globally (Bluedorn et al., 2021) and in South Africa (Casale and Shepherd, 2021) that women have borne the brunt of job losses, particularly in the early periods of the pandemic. In South African cultural occupations, this does not appear to be the case: while cultural jobs for both men and women declined in 2020, compared to 2019, the decline was steeper for men than for women. By 2020Q4, there were 136 462 women in cultural occupations (compared to 168 257 in 2019Q4) – a drop of 18.9%. In the same period, there were 158 399 men in cultural occupations (compared to 211 659 in 2019Q4) – a drop of 25.2%.

Thus, although there are fewer women in cultural occupations in South Africa than men overall, women appear to have been more resilient (that is, less negatively affected) during the COVID-19 crisis than their male counterparts.

Based on data from the LMDS analysis, this may be because there are considerably fewer young women (up to the age of 35) working in cultural occupations than young men. Other research (SACO, 2021) has shown that early career creative workers (freelancers and firms) in South Africa were more vulnerable to the COVID-19 shutdown than more established workers. Other factors that might have decreased the vulnerability of women in cultural occupations are that women in cultural occupations have very similar education levels to their male counterparts, and that female employees in cultural occupations are more likely to be employed on permanent contracts (73%) than their male counterparts (62.7%).

Other particularly vulnerable groups were freelance (own account) workers, and those working informally⁴ in cultural occupations. The number of freelance cultural workers fell from 120 400 to 81 900 between Quarters 1 and 2 of 2020 – a decrease of 32%, compared to a decrease of 22% for employees. By 2020Q4, own account worker numbers had increased to 96 000.

⁴ The term 'informal employment' is based on the ILO definition in which all workers, both within and outside of the informal sector (defined as employment in unregistered or unincorporated enterprises), without legal or social protection through their employment, are identified as 'informal'.

The number of people working informally in cultural occupations fell 38% between 2020Q1 and 2020Q2 (from 163 500 to 102 000), compared to a 15% decrease in formal cultural occupations over the same period. By 2020Q4, informal cultural occupations had increased to 128 200.

Workers in cultural industries include two parts of the Cultural Trident:

- People in cultural occupations working in the cultural sector, and
- People in support occupations working in the cultural sector.

It does not include “embedded” creatives, that is, people in cultural occupations who are working outside of the cultural industries (for example, a designer working in the automotive industry).

Like other parts of the economy, jobs in the cultural industries experienced an immediate fall in 2020Q2 compared to the same period in 2019 (-16.8%) – a larger percentage decrease than employment in the non-cultural industries (-14.2%). Cultural industries jobs in 2020Q3 grew again quickly compared to the same quarter in 2019, in response to the easing of the lockdown and the partial recovery of economic activity, but fell again in 2020Q4. As found in other studies, the cultural industries tend to be quite a volatile sector, responding to changes in GDP more dramatically than non-cultural sectors. Some parts of the creative industries, such as those associated with online production and digital work, could be expected to experience a short-term increase in demand.

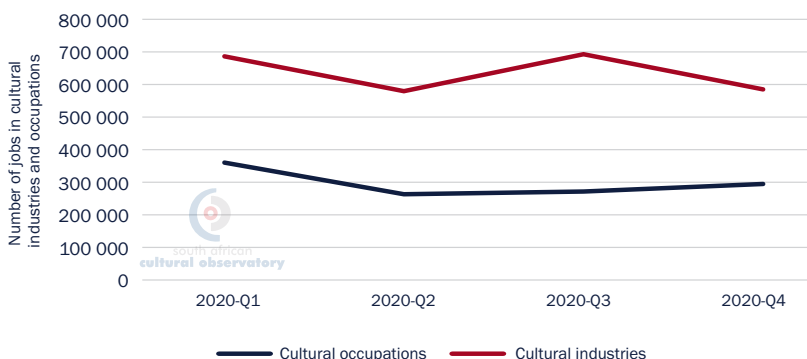


Figure 13: Number of jobs in the cultural industries and cultural occupations in 2020

Compared to cultural occupations (which includes people working in cultural or creative jobs both in the cultural industries and in other industries), employment in the cultural industries recovered significantly in Quarter 3 of 2020, but fell again in Quarter 4, while cultural occupations fell significantly in Quarter 2 of 2020, and showed a slow recovery over the rest of the year. Both measures

of employment ended 2020 at significantly lower levels than they were at the start of the year:

- Employment in cultural industries fell by 101 500 between Quarters 1 and 4 of 2020.
- Employment in cultural occupations fell by 65 360 between Quarters 1 and 4 of 2020.

Overall, the analysis of creative economy employment showed some hopeful signs prior to 2020: although the number of cultural occupations fell, the proportion of cultural jobs grew slightly, indicating some resilience. However, a particular concern is that early career creatives have been shown to be more negatively affected than older age groups, which threatens both the continued transformation and the sustainability of the creative economy in South Africa.

4.2 Characteristics of cultural jobs in South Africa

In terms of cultural occupations, by far the largest domain remains Visual Arts and Crafts (Domain C), which accounted for 44.5% of cultural occupations in South Africa in 2019. The transversal domain of Intangible Cultural Heritage (which includes categories such as 'Traditional chiefs and heads of villages' and 'Religious and associated professionals'), made up 22.5% of cultural occupations in South Africa in 2019.

Since 2017, Design and Creative Services occupations have increased their share of cultural occupations (from 11.8% to 13.4% in 2019), replacing Books and Press as the third largest domain in terms of employment. This is followed by Books and Press (which fell from 14.5% in 2017 to 12.4% in 2019). The decline in employment in Books and Press is corroborated by data from Statistics South Africa (Statistical Release P3041.2) which shows that the index of physical production volume for the publishing sector has been declining since the end of 2012, although some of the decline can be explained by the shift to online distribution.

Performance and Celebration decreased from 5% in 2017 to making up 4% of cultural occupations in 2019. Audio-visual and Interactive Media remained at 2.7%, and Cultural and Natural Heritage at about half a percent.

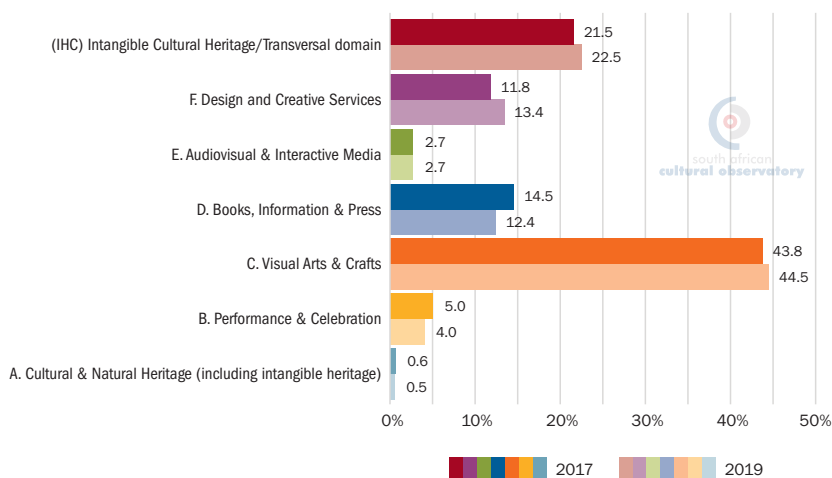


Figure 14: Share of cultural occupations by domain

The 2019 data shows an increase in the proportion of Black Africans working in cultural occupations to 75.5%, which is almost the same proportion as in non-cultural jobs. 86.7% of people working in cultural occupations in South Africa are Black (including Black Africans, Coloured people and those of Indian/Asian origin) compared to 83.6% in 2017. White people in cultural occupations are still somewhat over-represented (13.3% in 2017) compared to both the population demographics, and those working in non-cultural occupations, but there is now definite evidence of the ongoing transformation of cultural occupations over time.

Further evidence that cultural occupations are becoming more representative of the population over time can be found in an analysis of cultural occupations by age group. For the youth (up to 34 years old), 88.8% of people in cultural occupations in 2019 were Black, while for those aged 50+, only 80.4% were Black. What this indicates is that, as younger cohorts of cultural workers move through the system, the demographics should become increasingly racially representative of the population.

However, as found in other studies on the impact of the COVID-19 pandemic on creative economy workers in South Africa (SACO, 2021) and internationally (Eikhof, 2020), young and emerging (early career) cultural workers are more vulnerable to disruptions and job losses than older, established creatives. To ensure the continued transformation of the sector, it is important to provide support to especially young creatives.

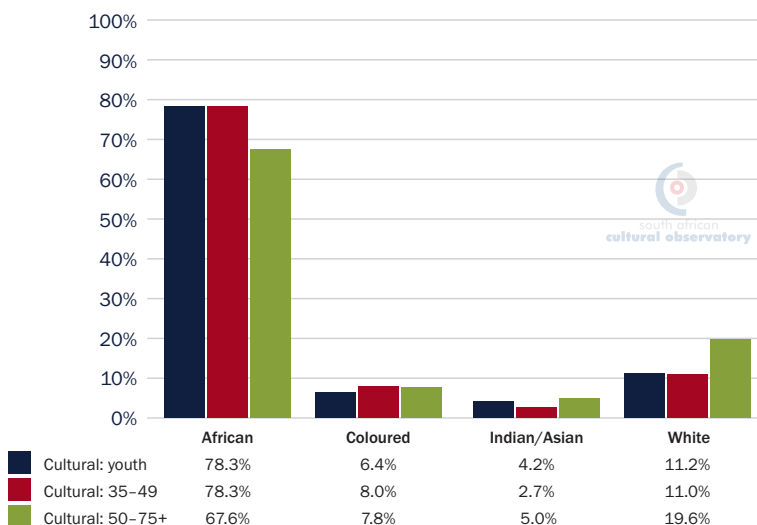


Figure 15: Cultural occupations by race and age groups 2019

In terms of gender, more workers in cultural occupations are men (57.3%) than women (42.7%), which is very similar to the gender distribution in non-cultural occupations and demonstrates that the gender bias in employment is also present in cultural occupations, as further discussed in a special report on “The Employment of Youth and Women in Cultural Occupations in South Africa” (SACO, 2019). There has been no significant change in the gender distribution of cultural workers between 2017 and 2019.

Also as noted in previous reports and mapping studies, the significant under-representation of young women in cultural occupations compared to young men is a concerning trend. In 2019, only 26.5% of women in cultural occupations were youth, compared to 37.7% of men.

A persistent pattern in South African cultural occupations is that a much greater proportion of people in cultural occupations work in the informal economy (46.3% in 2019) than in non-cultural occupations (29.8%). There are no significant differences between the proportions of men and women working informally in cultural occupations, and the distribution of formal versus informal employment was very similar to what was found in the 2017 study. However, the prevalence of informal work (along with freelance, short-term contract employment), does make those in cultural occupations more vulnerable to disruptions such as the COVID-19 pandemic.

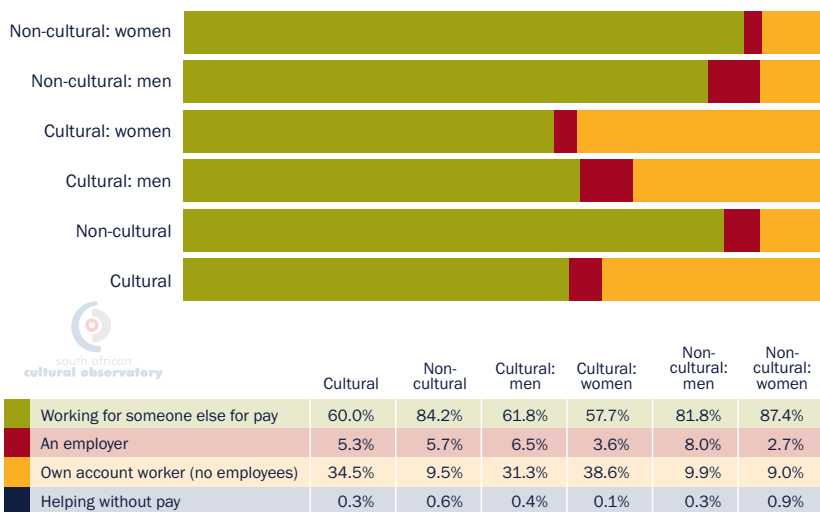


Figure 16: Types of employment in cultural and non-cultural occupations

When one considers the types of employment, as found in the previous mapping studies, some significant 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” (84.2%) – that is, they are employees. In cultural occupations, only 60% of people are employees, while a third (34.5%) are “own account workers” with no employees (also called freelancers). Only 9.5% of non-cultural occupations fall into this category. This finding provides support for the theory that freelance contract work is much more common in cultural than in non-cultural occupations. The distribution of employment types in 2019 remains very similar to patterns found in the 2017 data reported in the last mapping study.

4.3 Cultural occupations in each province

The map gives a comparative overview of the percentage contribution of each province to cultural occupations in South Africa. Gauteng Province is clearly dominant in terms of creative economy activity in the country and provides employment to 32% of South Africa’s workers in cultural occupations. The Western Cape (14.4%) and KwaZulu-Natal (18.2%) also have significant shares of South Africa’s workers in cultural occupations.

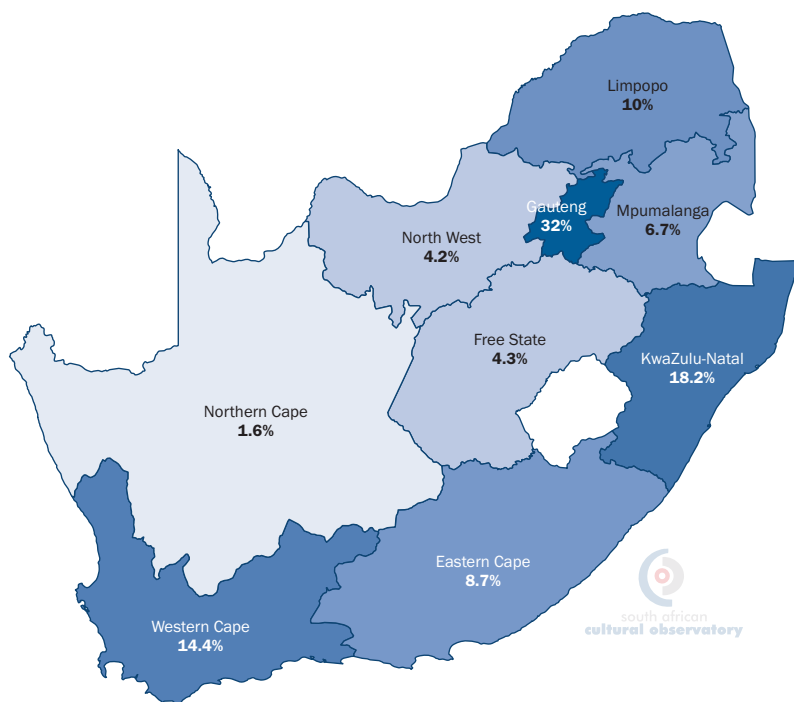


Figure 17: The percentage contribution of each province to cultural occupations in South Africa

5 | INTERNATIONAL TRADE



South Africa's policymakers have adopted a strategic approach to trade that emphasises trade policy as an instrument of industrial policy, geared towards the country's domestic development objectives (the dtic, 2021). South Africa's industrial policy framework in turn emphasises sectors with the potential to stimulate higher value-added growth and employment, including the cultural and creative industries (CCIs). The country's recent Re-imagined Industrial Strategy specifically identifies the creative economy as a priority sector of focus (Dicks, 2019; the dtic, 2019). To this end, a Sectoral Master Plan for the Creative Industries is under development. South Africa's trade policy and trade agreements are identified as an important lever in supporting the Master Plan process. This makes the analysis of the country's CCI trade highly relevant to South Africa's current growth and industrialisation strategy.

Chapter 3 examined South Africa's international trade in cultural goods and services, using local and international data sources. The focus is on the US-Mexico-Canada (USMCA) bloc and SADC in comparative perspective, and the impact of the COVID-19 pandemic.

In 2020, South Africa's cultural goods exports were worth US\$316.46 million, and made up 0.37% of the value of all South Africa's commodity exports (Table 4). Until 2018, cultural goods exports had been growing strongly, making up 0.47% of South Africa's total commodity exports (US\$448.86 million) in that year. As with GDP growth and employment, the economic slow-down and the impact of COVID-19 have had a negative impact on cultural goods exports. Cultural goods trade contracted more sharply than total commodity trade on both the export and import side for 2018–2020.

Table 4: South Africa's cultural goods trade: US\$ millions, percentage shares and average annual growth rates relative to total commodity trade

Cultural goods	2012	2015	2018	2020
Exports (US\$ millions)	250.17	297.94	448.86	316.46
Imports (US\$ millions)	673.44	519.13	473.23	257.80
Trade balance (US\$ millions)	-423.26	-221.19	-24.38	58.65
Exports (% share of commodity exports)	0.25	0.36	0.47	0.37
Imports (% share of commodity imports)	0.65	0.61	0.50	0.38

Average annual growth rates (%)	2009–2012	2012–2015	2015–2018	2018–2020
Cultural goods exports	19.53	6.00	14.64	-16.03
Cultural goods imports	14.98	-8.31	-3.04	-26.19
Total commodity exports	22.42	-6.11	5.18	-5.12
Total commodity imports	17.78	-6.28	3.12	-14.52

Like many small, open economies, South Africa had a cultural goods trade deficit, with the value of cultural goods imports being more than the value of exports. However, cultural goods imports have been declining recently, and for the first time in 20 years, South Africa had a positive cultural goods trade balance for some quarters in 2020 and 2021 (Figure 18). While cultural goods exports initially appeared to recover more quickly after the hard lockdown, they have not yet reached pre-pandemic levels.

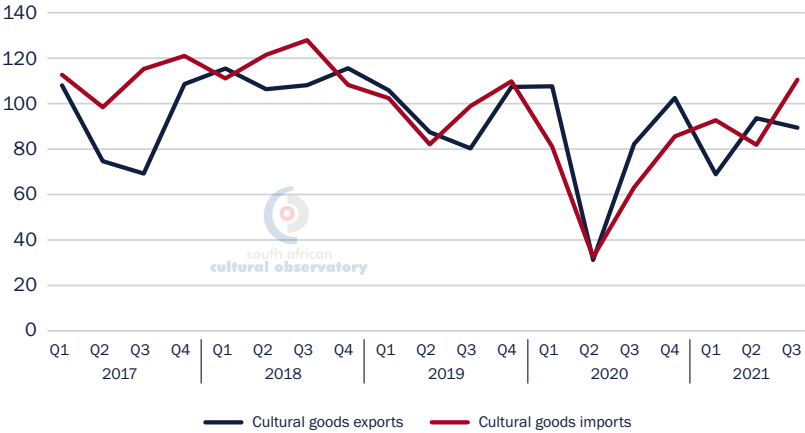


Figure 18: South Africa’s cultural goods trade 2017Q1–2021Q3 (current US\$ millions)

Figure 19 shows cultural goods exports and imports by domain for the periods 2016–2018 and 2019–2020 in US\$ millions.⁵ For each domain, the first two bars indicate cultural exports and imports in 2016–2018, while the second two bars depict cultural exports and imports in 2019–2020. Visual Arts and Crafts, Books and Press, and Performance and Celebration are the most significant domains for South Africa’s cultural goods trade. South Africa has a trade surplus in Cultural and Natural Heritage trade, and in Visual Arts and Crafts. The largest cultural trade deficits by domain in both periods were in Performance and Celebration and Books and Press.

5 A more detailed analysis of the evolving composition of South Africa's cultural goods trade by domain for the period 2001–2020, as well as the trade balance by domain, is provided in Chapter 5 of the mapping study on the country’s creative economy in historical perspective.

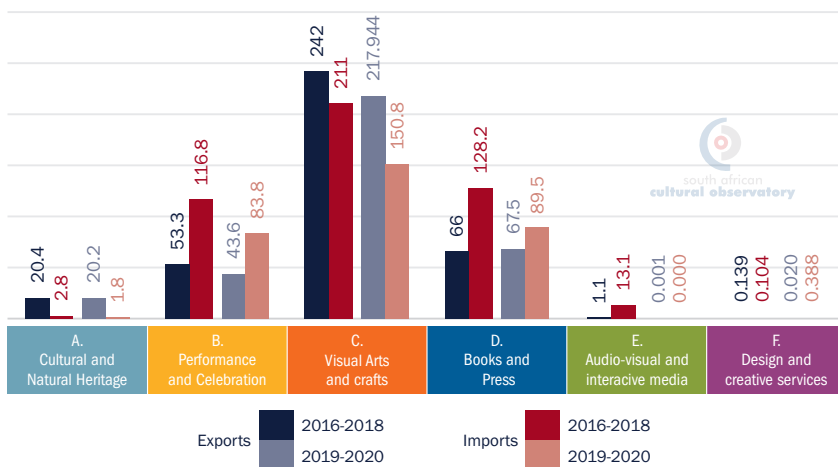


Figure 19: South Africa's cultural goods exports and imports by domain: 2016–2018 and 2019–2020 averages compared (US\$ millions)

South Africa has a trade surplus in Cultural and Natural Heritage trade in both periods, and also in Visual Arts and Crafts. The latter is particularly important, since Visual Arts and Crafts is such a prominent cultural trade domain. Previous SACO trade reports have discussed the impressive growth in the exports of this domain in recent years. The largest cultural trade deficits by domain in both periods were in Performance and Celebration and Books and Press.

The Audio-visual and Interactive Media and Design and Creative Services domains are important parts of cultural *services* trade, further discussed below. The dematerialisation of trade in these domains mean that data on cultural *goods* trade flows in these domains, as measured in the UNESCO FCS, is very small.

Turning to the impact of the pandemic on trade in the different domains, there was little difference in the trade pattern in the Cultural and Natural Heritage domain in the 2016–2018 and 2019–2020 periods. The trade surplus was maintained. In the Visual Arts and Crafts domain both exports and imports contracted in 2019–2020 compared to 2016–2018, but imports declined by more, widening South Africa's trade surplus in this domain to about US\$67.15 million. For Performance and Celebration, both exports and imports contracted in 2019–2020, with imports once again declining by more. This meant that the trade deficit in this domain was reduced from US\$63.54 million to US\$40.21 million. In the case of Books and Press, exports increased slightly between 2016–2018 and 2019–2020, while imports declined, so South Africa's Books and Press trade deficit fell from US\$62.17 million in 2016–2018 to US\$22.03 million in 2019–2020.

5.1 Cultural goods trading partners

The USMCA, EU28⁶ and SADC were South Africa's three most important regional trading partners for cultural goods exports in 2019.

Table 5: South Africa's cultural goods trade with selected regions 2019 (US\$ millions and regional shares)

Region	SA exports	% Exports	SA imports	% Imports
USMCA	149.440	39.1	37.798	9.58
EU28 (including UK)	86.115	22.5	101.985	25.8
Rest of SADC	75.928	19.9	13.586	3.44
Rest of BRICS	34.623	9.06	156.624	39.7
Rest of Africa less SADC	13.219	3.46	0.616	0.16
Middle East	5.736	1.50	2.328	0.59
Latin America less Brazil	3.305	0.87	3.172	0.80
East Asia less China	1.725	0.45	26.151	6.62
World	381.961	100.00	394.742	100.00

USMCA (and primarily the US) received 39.1% (US\$149.44 million) of South Africa's cultural goods exports in 2019, up from 33.2% in 2018. The EU28 was the destination for 22.5% (US\$86.12 million) of the country's cultural goods exports, up from 15% in 2018. The SADC region accounted for 19.9% and the rest of Africa 3.46% in 2019, yielding a cultural goods export share of 23.36% for the continent as a whole. This was marginally up from 23% in 2018. In 2019, the BRICS market was ranked fourth as an export destination with a share of 9.06%

On the import side, BRICS (largely due to China and, to a lesser extent, India) was the most important source of cultural goods imports for South Africa in 2019 with a share of 39.7% (US\$156.62 million), much the same as in 2018. This was followed by the EU28 with an import share of 25.8% (US\$101.99 million), compared to 24% in 2018. The USMCA bloc (again, mainly the US) accounted for 9.58% (US\$37.8 million) of cultural goods imports in 2019, up from 8.9% in 2018. In 2019, the rest of East Asia (less China) ranked next, with a share of 6.62%. The SADC region accounted for only 3.44% of South Africa's cultural goods imports in 2019, and the rest of the continent even less at 0.16%. The continent's total share of 3.6% was slightly lower than that of 2018 which was 4.07%.

In 2019, South Africa had a significant cultural goods trade surplus with USMCA (of US\$111.64 million) and with SADC and the rest of Africa (US\$62.35

⁶ Including the UK since the table is for 2019.

million and US\$12.6 million respectively). The USMCA bloc has become an increasingly important destination for South Africa's cultural goods exports in Visual Arts and Crafts, Cultural and Natural Heritage, and Performance and Celebration domains. Visual Arts and Crafts exports to USMCA increased in 2020, as did Books and Press. South Africa's cultural goods exports to SADC also increased in 2020, during the COVID-19 pandemic. Exports to SADC grew in the Performance and Celebration and Books and Press domains.

Intra-industry trade (IIT) refers to trade in products that are classified within the same sub-sector, sector or industry (depending on the level of aggregation of the data), while inter-industry trade refers to trade in products from two different sub-sectors, sectors or industries.⁷ Intra-industry specialisation and trade is associated with lower adjustment costs to trade expansion as well as higher-value manufacturing production and trade (Cattaneo and Fryer, 2002). This suggests that promotion of intra-industry specialisation and trade could be a useful component of an industrial strategy for the CCIs for sub-sectors or product categories where scale economies and product differentiation are important.

Table 6 depicts South Africa's IIT in each domain and for total cultural goods trade with USMCA, SADC and the world. The table also indicates cultural goods trade flows (exports plus imports) in absolute terms between South Africa and each region by domain. (Domain E. Audio-visual and Interactive Media is excluded because of missing data or zero trade flows, which means that the index cannot be computed.)

Table 6: South Africa's IIT (trade-weighted Grubel-Lloyd indices) by domain and partner, 2019

IIT in per cent Cultural trade in US\$ millions	A. Cultural and Natural Heritage	B. Performance and Celebration	C. Visual Arts and Crafts	D. Books and Press	F. Design and Creative Services	Total cultural trade A to F
USMCA	1.55	34.48	9.00	4.52	0.00	10.26
<i>Cultural trade</i>	<i>14.458</i>	<i>17.743</i>	<i>131.039</i>	<i>23.994</i>	<i>0.004</i>	<i>187.238</i>
SADC	65.28	1.64	18.23	28.10	0.00	22.68
<i>Cultural trade</i>	<i>0.337</i>	<i>10.029</i>	<i>23.509</i>	<i>55.625</i>	<i>0.014</i>	<i>89.514</i>
World	10.11	30.41	37.02	56.22	31.93	39.08
<i>Cultural trade</i>	<i>26.442</i>	<i>149.797</i>	<i>428.432</i>	<i>171.913</i>	<i>0.119</i>	<i>776.703</i>

⁷ For example, the exchange of string musical instruments for jewellery would count as inter-industry trade, while the exchange of guitars for violins would be counted as intra-industry trade.

In South Africa's cultural goods trade with USMCA, there is notable IIT of 34.48% in the Performance and Celebration domain. However, IIT indices are relatively low in the other domains and for cultural goods trade with USMCA in the aggregate which is just 10.26%. In the case of Visual Arts and Craft, with an IIT index of 9%, the trade balance is significantly in South Africa's favour. In the Books and Press domain, with an IIT index of 4.52, South Africa has a trade deficit with USMCA. Export promotion by South Africa in Books and Press would both reduce the country's deficit and increase the IIT index for this domain.

There is more IIT between South Africa and the SADC region for cultural goods trade overall (22.68%) than with USMCA (10.26%). This is also the case in Cultural and Natural Heritage (65.28%), Visual Arts and Crafts (18.23%), and Books and Press (28.10%) in comparison to USMCA. It is important to note that while trade is quite balanced between South Africa and SADC in Cultural and Natural Heritage, yielding a high IIT index, the trade flows involved are very small. South Africa already has a trade surplus vis-à-vis SADC in Visual Arts and Crafts and Books and Press.

As noted in the previous mapping study, South Africa's IIT in cultural goods trade with the EU in 2018 was 27.3%, higher than that with both SADC (22.69%) and USMCA (10.26%) a year later. However, IIT with the BRICS grouping was very low (at 5.01% in 2018), reflecting the cultural goods trade deficit that South Africa has with China in particular, but also with India.

Table 7: Trade complementarity indices (%) between South Africa and selected regions, 2019

	Partner		
	USMCA	SADC	EU
South Africa's export TCI	47.20	35.79	65.07
South Africa's import TCI	43.65	21.06	52.09

Trade complementarity indices (TCIs) are used to assess the potential for trade expansion between trading partners. South Africa's Export TCI with the USMCA (47.20%) exceeds that with SADC (35.79%) by nearly 12 percentage points. However, the country's export TCI with the EU is even greater at 65.07%.

South Africa has a low Import TCI with SADC, which suggests that the region does not produce enough of the range of cultural products that South Africa imports. There is a need to build productive capacity in the CCIs in the SADC region, and address non-tariff barriers, infrastructure constraints, transport costs, financing, and information flows.

5.2 The growing importance of cultural services trade

Growing digitisation has increased the importance of particular services trade categories in the identification and measurement of cultural trade. However, there is currently a lack of availability of services trade data at the required level of disaggregation to measure cultural services trade adequately in line with the categories identified as “cultural” in the UNESCO Framework for Cultural Statistics. Nevertheless, it is possible to track services imports and exports that are relevant for the CCIs.

Table 8 shows South Africa’s services exports, imports and trade balance in the sectors that are relevant for cultural services trade for the period 2018–2020. Most of the data are from SARB (2021), but the partial disaggregation of Personal, Cultural and Recreational Services to depict Audio-visual and Related Services as well as Other PCR separately is obtained from the ITC, UNCTAD and WTO (2021) Services Trade Database. All data in the table are in current billions of Rand.

Previous SACO mapping studies showed that South Africa had a relatively large and growing trade surplus between 2007 and 2018 in Personal travel services. Although not all of this category is related to cultural services trade, the trade surplus in this sector widened markedly up until 2018. Between 2018 and 2019, the trade surplus increased slightly (from R76.26 billion to R77.61 billion), but with the onset of the COVID-19 pandemic in 2020, it contracted sharply. The trade surplus in Personal travel services in 2020 was only just over a third of its 2019 level.

Although the 2021 data are not yet available, the outlook for the sector remains bleak as repeated travel bans are still being imposed around the world during different phases of the pandemic. On the export side, the share of Personal travel services exports in South Africa’s total services exports fell from 48% in 2019 to 27% in 2020. The import share fell from 14% to 5.5% in the same period. The impact of the pandemic on Personal travel services was largely responsible for turning South Africa’s small overall services trade surplus in 2018 into a significant deficit in 2020.

Under core cultural services, the Personal, Cultural and Recreational (PCR) services category is relevant, although it contains activities that are not part of cultural services trade. Two of the components within the PCR services data that are relevant to the CCIs are Audio-visual and Related Services and Other PCR services. Since 2007, South Africa has run a surplus in both sub-sectors, except for 2011 in the case of Other PCR services. In Audio-visual and Related Services, exports grew more strongly than imports after 2009, and growth accelerated noticeably from 2014. The growing trade surplus in Audio-

Table 8: South Africa's trade in services sectors relevant for cultural services trade 2018–2020

Services trade in R billions		2018	2019	2020
Personal travel services	Exports	108.65	111.25	37.87
	Imports	32.38	33.64	10.19
	Balance	76.26	77.61	27.68
Charges for the use of intellectual property	Exports	2.42	2.18	2.10
	Imports	20.28	19.60	19.65
	Balance	-17.86	-17.42	-17.57
Telecomms, computer & information services	Exports	8.43	10.00	11.70
	Imports	30.13	36.22	42.56
	Balance	-21.70	-26.23	-30.86
Advertising & market research services	Exports	3.34	3.53	3.06
	Imports	3.84	4.21	4.17
	Balance	-0.50	-0.68	-1.11
Architectural, engineering & other technical services	Exports	9.60	6.68	7.63
	Imports	11.35	13.59	11.30
	Balance	-1.76	-6.91	-3.67
Personal, cultural & recreational services, of which:	Exports	5.33	5.72	3.46
	Imports	1.27	2.24	2.04
	Balance	4.06	3.48	1.42
Audio-visual & related services	Exports	3.06	3.18	2.36
	Imports	0.39	0.51	0.45
	Balance	2.67	2.67	1.91
Other personal, cultural & recreational services	Exports	0.24	0.26	0.27
	Imports	0.06	0.10	0.02
	Balance	0.18	0.16	0.25
Total services	Exports	225.19	229 706	139 658
	Imports	224.69	238 369	184 594
	Balance	0.5	-8.66	-44 936

Source: Authors' computations from SARB, 2021, and ITC, UNCTAD and WTP, 2021

visual and Related Services widened further between 2018 and 2019. Exports and imports both contracted during 2020, and the trade surplus decreased, although not dramatically. Exports actually grew in 2020 in Other PCR services while imports fell, widening the trade surplus in this sub-sector.

Other sectors important for cultural services in which South Africa's exports increased between 2019 and 2020 include Architectural, engineering & other technical services (which contains the Architectural services sub-sector). The trade deficit nearly halved in this sector. Interestingly exports also increased in Telecommunications, computer and information services which are important for both core cultural services (the Other information services component) and Equipment and supporting materials (Computer services and software licences). However, the faster growth in imports meant that the trade deficit widened in this sector. The Telecommunications, computer and information services sector is one of two sectors important for cultural services trade for which South Africa's trade deficit is greatest. The other sector is Charges for the use of intellectual property.

In sum, the main impact of the COVID-19 pandemic on services trade was felt in the Personal travel services sector. The PCR services sector as a whole was quite strongly affected on the export side, but Audio-visual and Related Services and Other PCR services demonstrated some resilience to the shock. Exports increased between 2019 and 2020 in some of the broad services sectors relevant for cultural services trade, including Architectural, Engineering and other technical services and Telecommunications, computer and information services.

5.3 Provincial CCI exports

The map (Figure 20) gives a comparative overview of the percentage contribution of each province to South Africa's exports of cultural goods and services (in percentage terms).

The Western Cape is clearly dominant in terms of exports of CCIs in the country and contributes 53.1% to South Africa's exports of CCI goods. Gauteng Province (32.4%) and KwaZulu-Natal (10.9%) also have significant shares of South Africa's CCI export basket.

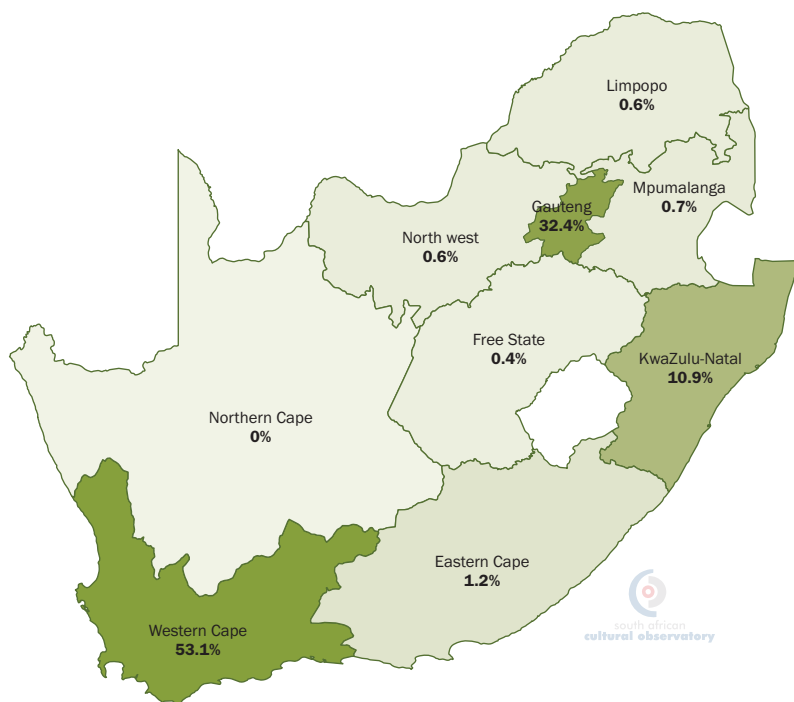


Figure 20: The percentage contribution of each province to South Africa's cultural goods exports

6 | KEY FINDINGS AND IMPLICATIONS



The overall goal of the CCI Mapping Study 2022 was to provide updated information on how the cultural and creative industries contribute to the economy of South Africa in terms of GDP, employment and international trade. As it is part of SACO's mandate to produce reliable and internationally comparable statistics, the UNESCO Framework for Cultural Statistics (2009) was used to define and measure the sector. The way in which this mapping study contributes to the "Thematic Indicators for Culture in the 2030 Agenda" (UNESCO, 2019) is demonstrated in Figure 18. A special focus of the 2022 mapping study is to measure the impact of the COVID-19 pandemic on different parts of the creative economy so that recovery can be tracked as lockdown regulations are eased⁸.

Using the rebased 2015 GDP data released by Statistics South Africa in 2021, a Cultural Satellite Account showed that the CCIs directly contributed 2.97% of South Africa's GDP (R161 billion) in 2020. As found in previous mapping studies and in the international literature, the creative economy grows quickly when the economy is doing well, but tends to decline more quickly than other sectors when economic growth slows. The CCIs generally grew faster in 2017 than the South African economy overall. However, the growth rate for the sector slowed down relative to the South African economy from 2018. The impact of the slowdown in the economy during 2019 and the COVID-19 lockdowns have resulted in all domains showing some decline over time. Following a peak year-on-year growth rate of 3.4% in 2017, the creative economy showed signs of slowing growth even before the pandemic (year-on-year growth rate of -1.1% in 2019), and a significant overall drop in 2020 (-6.6% in 2020 compared to -5.9% for the economy as a whole).

The largest domain is Design and Creative Services: R51 billion in 2020, 32% of the CCI contribution to GDP. The second-largest domain is Audio-visual and Interactive Media: R48.4 billion in 2020, 30% of the CCI contribution to GDP. Visual Arts and Crafts made up 15% of the CCI contribution to GDP in 2020 but was one of the most negatively impacted by the COVID-19 pandemic. Books and Press made up 13% of the CCI contribution to GDP in 2020, and also had a negative growth rate between 2019 and 2020 (but was already slowing before the pandemic). In addition to their direct impact, the CCIs have strong backward and forward linkages with the rest of the economy, resulting in large multiplier effects, especially in commercial application domains such as Design and Creative Services, and Audio-visual and Interactive Media.

8 This Capstone report summarises the main findings of Chapters 1, 2, and 3 of the Mapping Study. Chapter 4 provides information on the contribution of the CCIs to each province (in terms of GDP, employment and exports), while Chapter 5 provides a historical analysis of the CCIs, and a discussion of the phases of South African cultural policy. All chapters are available on the SA Cultural Observatory website <https://www.southafricanculturalobservatory.org.za/>

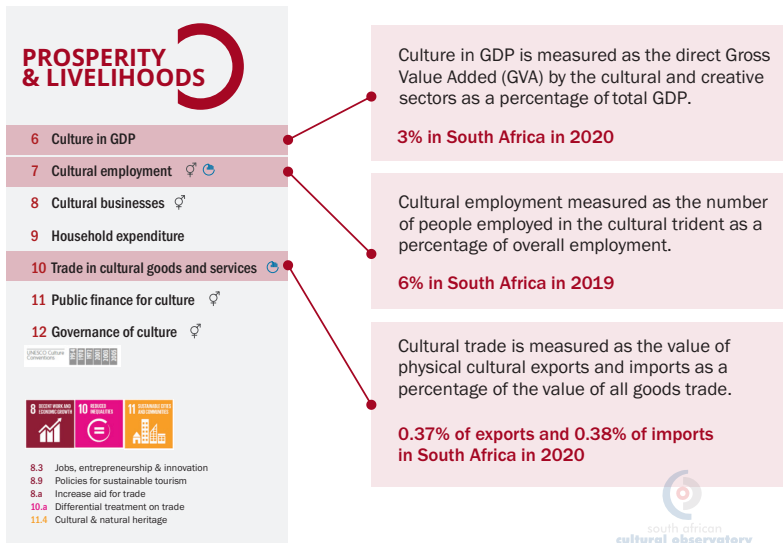


Figure 21: Mapping the South African Cultural Economy using UNESCO 2030 Indicators

Using the Cultural Trident method (which includes people in cultural occupations working in the cultural sector as well as working in non-cultural firms, and people in non-cultural occupations working in cultural firms), the creative economy accounts for 6% of all employment in South Africa (an estimated 1 million jobs). 2.3% of employed people in South Africa were identified as being employed in cultural occupations in 2019 (similar to Malaysia, and higher than Uganda and Mozambique). The largest domain, in terms of cultural occupations in 2019, continues to be Visual Arts and Crafts (44.5%), followed by Intangible Cultural Heritage (22.5%), Design and Creative Services (13.4%) and Books and Press (12.4%).

Creative occupations in South Africa are showing continued transformation: including Black African, Coloured and those of Indian/Asian origin, 86.7% of people working in cultural occupations in South Africa are Black (compared to 83.6% in 2017). The profile of those in younger age groups is also more representative than older people in cultural occupations. More workers in cultural occupations are men (57.3%) than women (42.7%), which is very similar to the gender distribution in non-cultural occupations. As noted in previous reports and mapping studies, the significant under-representation of young women in cultural occupations compared to young men is a concerning trend.

However, as found in other studies on the impact of the COVID-19 pandemic on creative economy workers in South Africa (SACO, 2021) and internationally,

young and emerging (early career) cultural workers are more vulnerable to disruptions and job losses than older, established creatives. To ensure the continued transformation and sustainability of the sector, it is important to provide support especially to young creatives.

A much greater proportion of people in cultural occupations work in the informal economy (46.3% in 2019) than those in non-cultural occupations (29.8%). Cultural occupations are also more likely to be freelance “own account” workers (34.5% of cultural occupations compared to 9.5% of non-cultural workers). Both these characteristics make those in cultural occupations more vulnerable to shocks, such as the COVID-19 lockdown.

QLFS data showed that cultural occupations suffered larger relative decreases in the number of jobs in 2020 than non-cultural occupations: by 2020Q4 there were 295 000 people working in cultural occupations, compared to 380 000 in 2019Q4 (a 22% decline in cultural occupations, or 85 000 jobs lost between 2019Q4 and 2020Q4). However, although there are fewer women overall working in cultural occupations and industries, women in cultural occupations were not as negatively affected by the crisis as men: While cultural jobs for both men and women declined in 2020, compared to 2019, the decline was steeper for men (a year-on-year drop of 25%) than for women (a year-on-year drop of 18.9%).

In 2020, South Africa’s cultural goods exports were worth US\$316.46 million, and made up 0.37% of the value of all South Africa’s commodity exports. Until 2018, cultural goods exports had been growing strongly, making up 0.47% of South Africa’s total commodity exports (US\$448.86 million) in that year. As with GDP growth and employment, the economic slow-down and the impact of COVID-19 have had a negative impact on cultural goods exports. Cultural goods trade contracted more sharply than total commodity trade on both the export and import side for 2018–2020.

Like many small, open economies, South Africa had a cultural goods trade deficit, with the value of cultural goods imports being more than the value of exports. However, cultural goods imports have been declining recently, and for the first time in 20 years, South Africa had a positive cultural goods trade balance for some quarters in 2020 and 2021. While cultural goods exports initially appeared to recover more quickly after the hard lockdown, they have not yet reached pre-pandemic levels.

Visual Arts and Crafts, Books and Press, and Performance and Celebration are the most significant domains for South Africa’s cultural goods trade. South Africa has a trade surplus in Cultural and Natural Heritage trade, and in Visual Arts and Crafts. Visual Arts and Crafts contributes a relatively small share to the creative economy in terms of the value of its production (15%). However, it accounts for

44% of cultural occupations. The promotion of cultural goods exports in this domain would not only increase the overall cultural goods surplus, but could help to improve the value added of the sector and support jobs.

In 2019, South Africa had a significant cultural goods trade surplus with USMCA (of US\$111.64 million) and with SADC and the rest of Africa (US\$62.35 million and US\$12.6 million respectively). The USMCA bloc has become an increasingly important destination for South Africa's cultural goods exports in Visual Arts and Crafts, Cultural and Natural Heritage, and Performance and Celebration domains. Visual Arts and Crafts exports to USMCA actually increased in 2020, as did Books and Press. South Africa's cultural goods exports to SADC also increased in 2020, during the COVID-19 pandemic. Exports to SADC grew in the Performance and Celebration domain and in Books and Press.

TCIs are used to assess the potential for trade expansion between trading partners. South Africa's Export TCI with the USMCA (47.20%) exceeds that with SADC (35.79%) by nearly 12 percentage points. However, the country's export TCI with the EU is even greater at 65.07%.

South Africa has a low Import TCI with SADC, which suggests that the region does not produce enough of the range of cultural products that South Africa imports. There is a need to build productive capacity in the CCIs in the SADC region, address non-tariff barriers, infrastructure constraints, transport costs, financing and information flows. It is important to add a regional dimension to South Africa's CCI focus at the domestic level to harness the potential of the creative economy in other SADC countries and address regional imbalances.

Growing digitisation has increased the importance of services trade in the CCIs. CCI services exports grew strongly in several domains, including Audio-visual and Related Services until 2019. The impact of the pandemic on Personal travel services was largely responsible for turning South Africa's small overall services trade surplus in 2018 into a significant deficit in 2020.

There is overall evidence that South Africa's creative economy, like that of many countries, has been negatively affected by measures put in place to contain the COVID-19 pandemic. Production growth rates, which were already slowing in response to low overall economic growth rates, declined further. Cultural occupations declined dramatically between 2019 and 2020, as did international trade in cultural goods and most cultural services.

Nevertheless, there is also evidence that the creative economy continues to contribute significantly to South Africa's GDP, job creation and transformation agendas, and some parts of the sector have shown resilience, and the start of recovery.

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