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South African Cultural and Creative Industries Mapping Study: Review of methods and the way forward

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Summary

Mapping studies of the cultural and creative industries (CCIs) can raise the profile of the CCIs, benchmark industry development, be used as evidence of the economic importance of the industry, and identify potential areas of growth and policy intervention. The aim of this report was to evaluate the methodology of the DAC (2014) Mapping Study, which was the first national mapping study in South Africa.

The South African study compiled a database of 24 756 CCIs, and interviewed a sample of 2 477 of them. A review of international best practice revealed that, while the use of primary data has some advantages, it is only recommended when national-level secondary data is not available or where it is completely unreliable or out of date. The report on the SA Framework for Cultural Statistics (SAFCS) (2014) showed that South Africa does have "key data sets" at national level that could be used to map the CCIs. This is also the first step in compiling a system of Cultural Satellite Accounts.

Recommendations are that (i) Data from the 2014 Mapping Study be disseminated to stakeholders in various forms; and (ii) Phase 3 of the SAFCS (populating the framework with data) should be implemented.

Key Findings

- Mapping studies are an important way to provide evidence on the economic importance of the CCIs.
- The DAC 2014 Mapping Study was the first national mapping study undertaken in South Africa.
- Review of international best practice showed that the use of national level, secondary data has many advantages;
- The survey methodology used by the DAC (2014) study provides some useful data.
- Only 30% of respondents answered the question on monthly turnover, thus reducing the reliability of the economic impact results.
- It is also likely that younger firms, those without an online presence and who were not part of any formal associations, were under-represented.
- It is recommended that Phase 3 of the SA Framework for Cultural Statistics be implemented.

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1. Study goals and research methods

This report was commissioned by the South African national Cultural Observatory (hereafter referred to as the "CO") in January 2016. There were three main **goals** of the study:

(i) To review international best practice in mapping the Cultural and Creative Industries (CCIs);
(ii) To critically evaluate and compare the methodology used in the 2014 South African CCI mapping study; and
(iii) To suggest a way forward in terms of:
   a. Further research
   b. Dissemination of existing information.

Research methods included

- Extensive document analysis of:
  - Previous studies of the Cultural and Creative Industries undertaken in South Africa
  - International mapping studies and mapping study guides
  - Academic articles on the development of mapping studies in the CCIs
- Additional detailed analysis of the 2014 mapping study data
- Analysis of the 2015 "South African Framework for Cultural Statistics" report.

This report is intended to guide the way in which existing information from the mapping study can be disseminated to those working in the cultural and creative industries, policymakers, and researchers. It also aims to guide the way forward for the Cultural Observatory in terms of commissioning new research that will complement the existing data set, raise the profile of the CCIs in South Africa, and provide useful information for those in the CCIs and for policy makers.

2. The purpose and methodological approaches of CCI mapping

"Mapping studies can be of value to policy and industry as they provide core data about industries which are hard to classify and document statistically. In many cases they can be used as background justification for government support" (Higgs & Cunningham, 2008:8).

As set out in the South African Mapping Study (2014), defining the purpose of mapping study of the Cultural and Creative Industries (CCIs) is key to determining the research methodology to be used, and the information to be produced. Mapping studies can be used:

- to give greater visibility to the sector by demonstrating both cultural and economic values generated;
- by those in the cultural and creative industries to benchmark their progress against other firms, to plan ahead in terms of marketing and distribution and to improve collaboration and networking through the identification of strategic clusters;

- by industry organisations or institutions to lobby for support and to provide evidence of their value and economic importance;
- by government departments and policy-makers to identify areas of potential growth and development and to shape strategic interventions;
- by researchers to track progress over time and to analyse emerging developments in the sector.

Depending on the sponsor/s and areas of particular interest, the purpose of mapping studies varies widely, sometimes focusing on a whole country, or more narrowly on a specific cultural domain (UNESCO, 2009) or sub-sector of the domain. However, some of the most commonly tracked indicators include:

- Number and geographical distribution of firms in the industry;
- Firm characteristics by sub-group including industry structure (cluster analysis), legal organisation and concentration;
- Contributions to the economy (production, productivity or value added; contribution to tax);
- Employment (direct & indirect);
- Trade (exports and imports)

> *"Mappings are studies aimed at diagnosing a given situation by identifying its constituent element, the relations between them and the results of such interaction. Thus mapping is not a simple description of data, but rather is an interpretation whose purpose is to contribute to the solution of problems revealed by the diagnosis or known beforehand" (Guide to Producing Regional Mappings of the Creative Industries, Republic of Colombia, 2007:6).*

The South African study followed the steps set out in the UK *Mapping the Creative Industries: A Toolkit* (2010), shown in Figure 1. A number of objectives were listed, focused on determining the size and financial (GDP) impact of the CCIs in South Africa, as well as their contribution to employment and other characteristics. The main aim was to conduct: "A study that will map or review the cultural industries sector in South Africa…to provide DAC (as well as civil society) with insights on core issues that impact on the creative industries sector" (DAC National Mapping Study, 2014:9). The purpose of the study was to develop a set of CCI indicators that could be used to identify the needs of the sector and to implement policy. According to the Colombian Guide (2007:9), mapping studies based on national statistics can also be an important step in the construction of a system of Cultural Satellite Accounts (CSA).

Figure 1: Steps in planning a mapping study (Source: British Council, 2010:13)

An important part of any mapping study is to define the CCIs. As the UK *Toolkit* (2010) points out, there are a number of ways of doing this, all of which are currently debated. While the UNESCO Framework for Cultural Statistic (UNESCO, 2009) provides a broad overview (see Figure 2) it is seldom implemented directly, often because of the lack of detailed statistical data within various national statistical systems.

While the purpose of this report is not to review the various definitions of the cultural and creative industries, it is important to note that decisions made about such definitions will have far-reaching impacts on future research and policy formation.

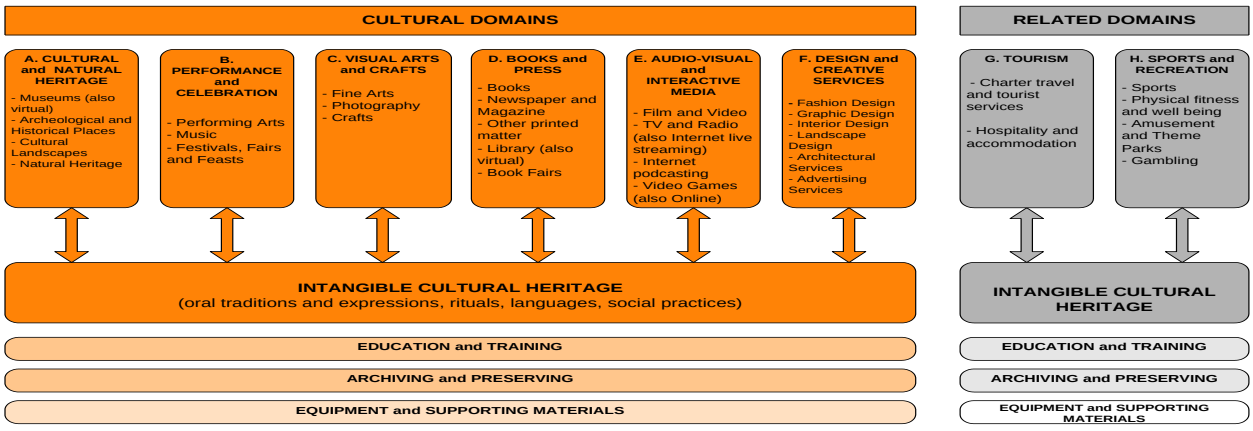

Figure 2: UNESCO Cultural Domains

3. International best practice in CCI mapping studies

All the mapping studies and guides reviewed for this report (Table 1) recommended the use of national level secondary data as the first step in mapping the CCIs. Only where there was a complete lack of such data (often when a very specific sub-sector or event was being studied), or where the data was entirely unreliable or out of date, were other data sources recommended. These first included other CCI institutions, such as labour unions and NGOs, before collection of primary data was considered. The collection of primary data was only discussed with reference to regional mappings or to case studies of specific industries or events. The Colombian guide (2007:50) also suggests that primary data collection can be useful for qualitative studies of, for example, industry operation in a specific cluster, and/or as complementary data to a national quantitative study using secondary data. Such studies can use surveys of CCIs, but also interviews and focus group discussions with key stakeholders. To reduce costs, they suggest providing an online "self-registration" option for CCIs, as was used in the cultural map of Chile. One of the most important problems faced when using primary data for mapping studies that include an estimate of economic impact is the estimation of the "universe" or population. If the size and characteristics of the CCIs are unknown, there is a risk that the size of the sector will be under- or over-estimated and that the sample will be biased.

Table 1: Review of International Mapping Studies

Country	Report	Year	Data collection method used/recommended
USA	Arts and Cultural Production Satellite Account	2015	Quantitative data from national statistical offices such as Arts and Cultural Production Satellite Account (ACPSA), U.S. Bureau of Economic Analysis, Tourism Satellite Accounts, US Census.
Republic of Colombia	Guide to Producing Regional Mappings of the Creative Industries	2007	Recommended use of available quantitative secondary information from (i) official national government statistics and (ii) professional associations and previous surveys. Primary information collection only recommended if data from these sources not available/reliable.
Global	Cultural Times: The First Global Map of Cultural and Creative Industries	2015	Quantitative data from national statistics, market research, existing CCI studies and industry reports, supplemented by interviews with "stakeholders and experts".
UK	Mapping the Creative Industries: A Toolkit	2010	Quantitative data from government national and regional statistical offices is recommended. If reliable data is not available, explore non-governmental statistics (trade associations, industry bodies, trade publications, online networks etc.). If these are not available, compilation of

			primary data should be explored. If this is not feasible (it is very costly), qualitative methods are suggested.
Argentina	Atlas Cultural de la Argentina.	2014	Quantitative study as part of "Cultural Information Systems" also incorporating Cultural Satellite Accounts. Made use of both primary sources, such as surveys of specific sectors conducted by SInCA (e.g. National Survey of Reading, the National Survey Cultural consumption), as well as national government statistics from the Bureau of National Accounts of the National Institute of Statistics and Census. Supplementary, region-specific data was obtained from other government agencies and business associations.

Some regional or city mapping studies make use of a different framework entirely and can provide detailed information not only on quantitative economic indicators, but also on "Community Identity Mapping- exploring", which includes "intangible cultural resources - the unique histories, values, traditions and stories that combine to define a community" (Dryden Cultural Mapping, 2015). Such micro approaches can produce detailed cultural maps (see figure 3) that provide useful local-level information on the non-profit sector as well. These studies mostly make use of primary data collection through questionnaires (online and hardcopy), community and business forums, local institutions and online directories (Cultural Mapping Guide for Small Towns, Canada, 2012).

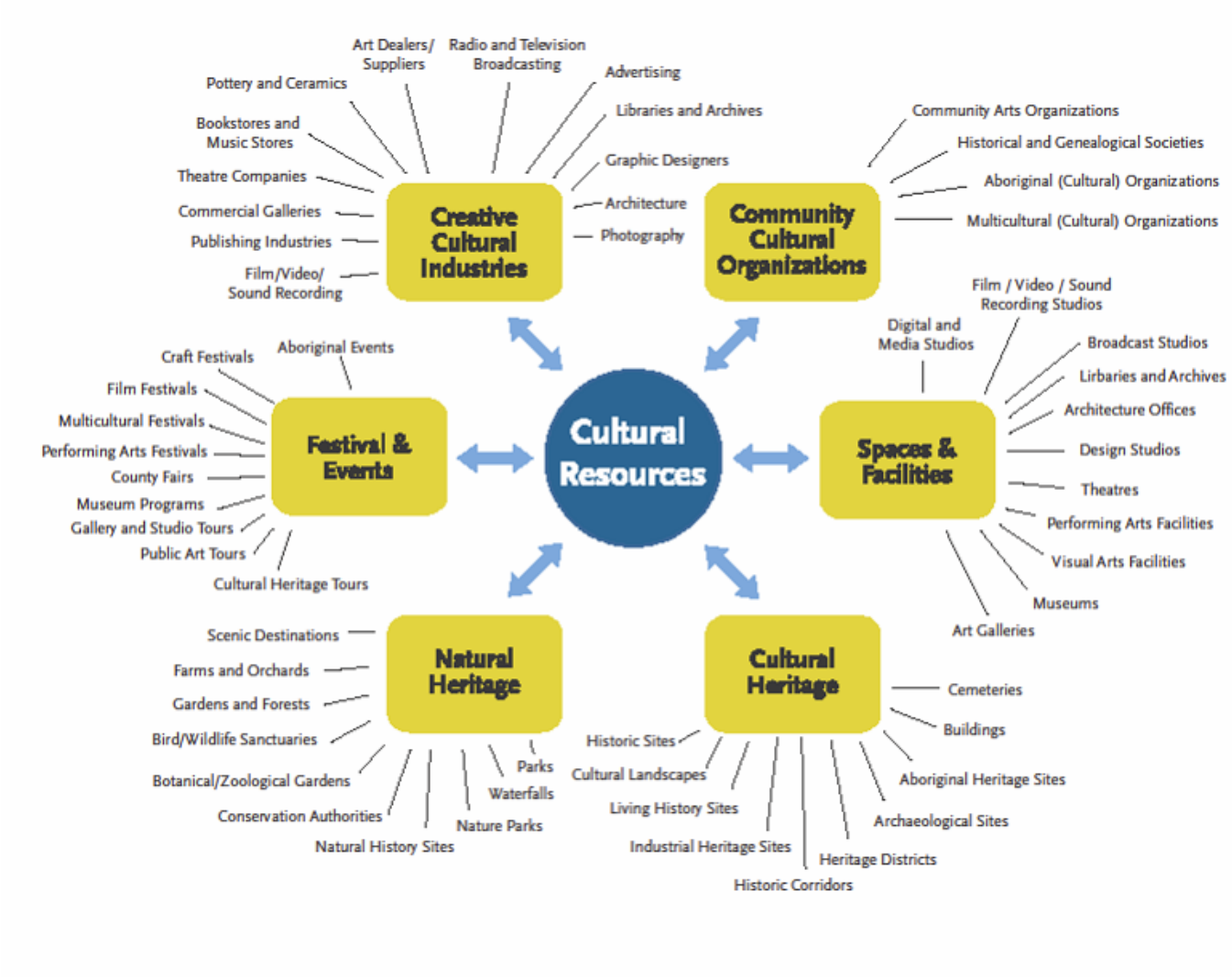

Figure 3: An example of a detailed local-level cultural mapping study (Source: Dryden Cultural Mapping, 2015)

4. The South African 2014 mapping study methodology

The 2014 South African CCI mapping study followed an almost unique methodological approach: The use of primary data, from the outset, to attempt a first-round national map of the industry. The method consisted of two main approaches:

(i) The construction of a **database** of 24 756 CCIs in South Africa, including the business name, business type, UNESCO domain, description, contact details and location of each organisation; and

(ii) Extensive **interviews** (face to face and telephonically) with a sample of 2 477 CCIs to collect information on turn-over, employment, markets, funding sources, challenges, opportunities and many other variables.

For the construction of the database, online searches and existing databases were utilized. Key CCI institutions were contacted and data requested, as were key media publications, some of whom could not share membership details directly, but who contacted their members and invited them to participate. Each entry was verified either online, or by telephone. Those contacted by telephone were also asked if they could identify other CCIs that could be included (snowball sampling).

Using a sophisticated telephonic interview system, a "random" sample of those in the database was selected to participate in interviews. However, since Plus94 reports that, presumably because of time constraints, telephone interviews were conducted while the database was being assembled. This means that those firms that were added to the database first were more likely to be selected than those added later on, causing potential bias.

The study method continues a trajectory of regional studies that began in 2006, as a result of a collaboration between DAC, the British Council and the provincial governments of the Western Cape and Gauteng. These regional reports also used online searches, data obtained from industry bodies, sector associations and interviews with key stakeholders to derive the "universe" of the CCIs in the province. This was followed by a survey of a stratified, random sample to collect primary data from the CCIs themselves.

5. Advantages and Challenges of the Method

Mapping study guides agree that collection of primary data can provide useful insights into the CCIs, and can avoid some of the problems associated with secondary data, such as double counting or over-

estimated of CCI activity because national statistical categories are too broad to focus directly on CCIs. Interviews with CCI firms are also the only way to collect qualitative information on the opinions of those working in the industry, especially information on challenges and opportunities faced by the sector.

As pointed out in the Gauteng (2008) report, the decision to make use of primary survey data, rather than national statistics, was motivated by several key challenges associated with national data. In particular, "The key challenge is the inability of official statistics to keep pace with the rapid changes and consequent classification problems that occur in the creative industries" (Gauteng Mapping Study, 2008).

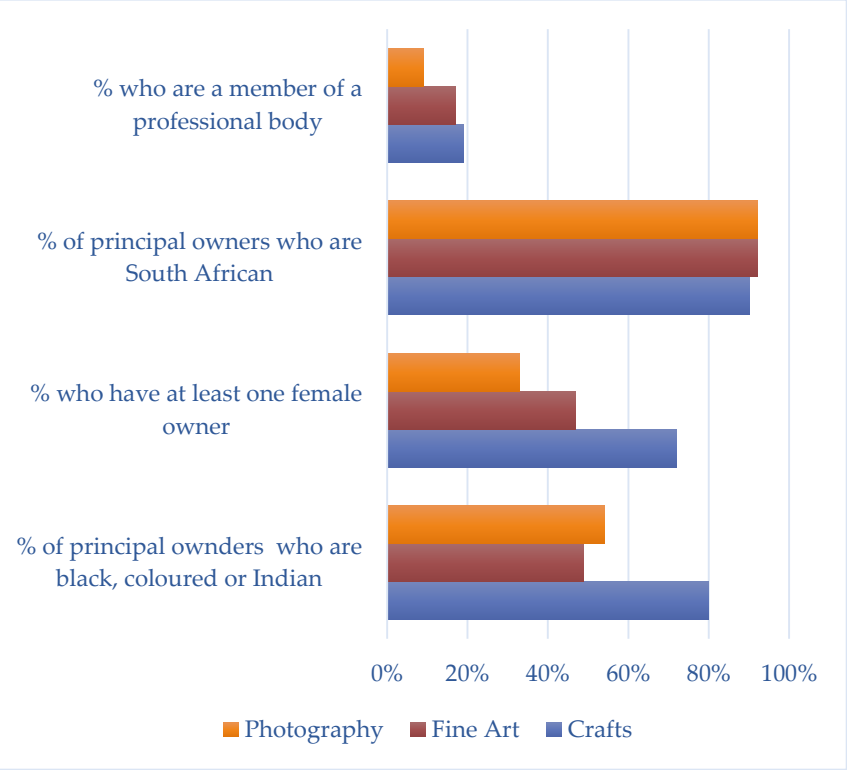

Figure 5: Characteristics of Visual and Performing Arts Sub-Groups (Source: Own analysis of DAC 2014 Mapping Study data)

The 2014 DAC Mapping Study thus provides very useful cross-sectional interview data on the CCIs in South Africa from the point of view of those in the industry itself (examples of detailed sub-group analysis is provided in Figures 5 and 6). The detailed description of each firm, including their domain, sub-domain, age, employees (including demographic information such as race, age, employment level and educational attainments), allows analysis of each sub-group, and can provide useful, nuanced information to both those in the industry and policy makers. This level of detailed information cannot be obtained from other sources.

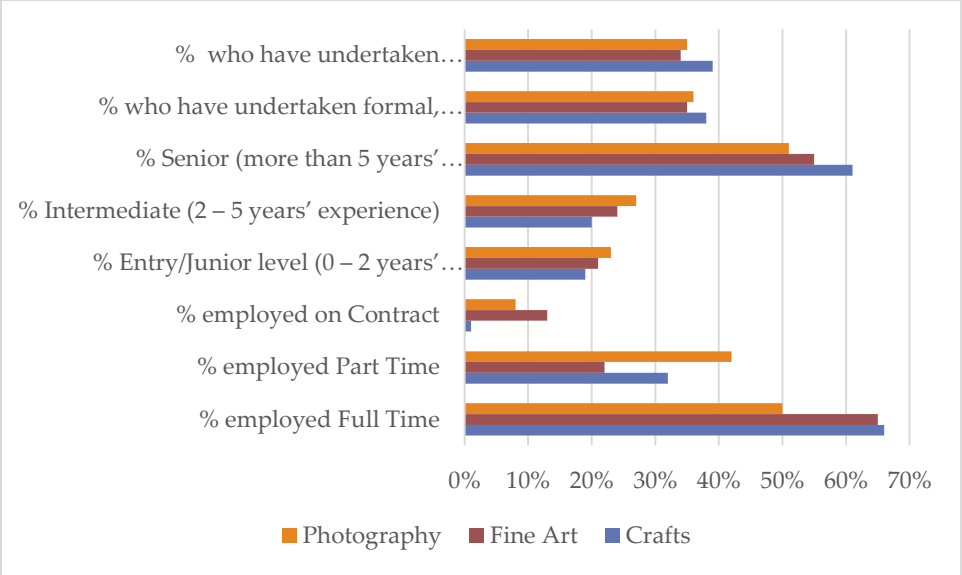

Figure 6: Characteristics of Employees in Visual and Performing Arts Sub-Groups (Source: Own analysis of DAC 2014 Mapping Study data)

While the primary data method has some advantages, there are a number of limitations to the method, some of which are pointed out in the 2014 report itself.

Firstly, the 2014 study notes that the CCI database that was compiled is likely to be an underestimate of the true size of CCIs in South Africa because (i) some industry organisations were unable, or unwilling, to share the details of their members and (ii) "many informal, unregistered entities may not have been captured" (DAC National Mapping Study, 2014:21). To account for this, the study estimated an under-count of between 10% and 30%. While the latter problem is also a limitation of using secondary data (perhaps even more so), the use of national level data collected via tax receipts and labour force surveys is likely to give wider coverage and more reliable data.

In terms of the interviews on which most of the analysis, including the economic impact component, is based, only about 10% of CCI firms contacted were willing to participate, and not all these were willing to answer all the questions (DAC National Mapping Study, 2014:22).

Low response rates are a problem in any survey research method, but can be especially problematic if a particular group is under-represented. For example, the report notes that it was "very difficult" to get non-South Africans to participate in the research.

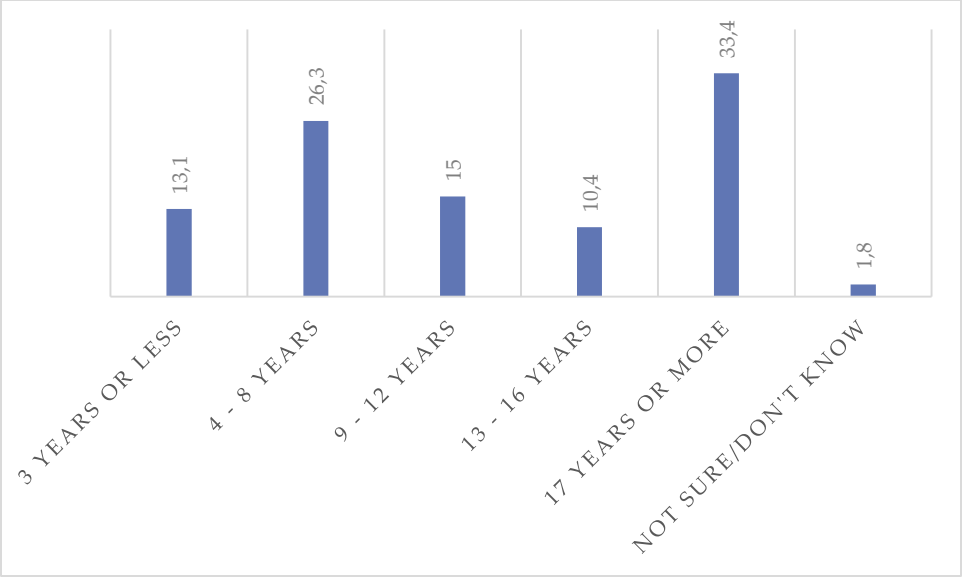

Figure 6: Percentage of South African CCIs in each age category (Source: DAC National Mapping study, 2014:52)

Another indication that the sample was somewhat biased is the high average age of CCIs in the sample (13.61 years), despite the fact that (i) most CCIs internationally, and in South Africa, are small firms; and (ii) small, medium and micro businesses in general are known to have a high failure rate in the first five years of operation, thus resulting in a young average age of firms in such industries. Of the CCIs surveyed, 27% were one-person businesses, and a further 34.2% had between 2 and 5 employees.

Compare these results to a general survey of small businesses in South Africa (FinScope, 2010), which found that 41% of small businesses were in their start-up phase (less than 2.5 years old), and a further 21% were between 2.5 and 5.5 years old. In the Cultural and Creative industries, characterised mainly by SMMEs, the average age would thus be expected to be much younger. This suggests that the methodology used to compile the database may have under-represented newer CCI start-ups (who did not yet have a strong online presence, who were not part of formal industry associations, and were not known to others in the industry and so also not captured by the snowball sampling). These limitations are specifically mentioned in the Gauteng regional mapping report (2008), which also points out that the impact of under-counting smaller firms, while not likely to have much of an effect on economic impact figures

> "The lack of a comprehensive population list of creative sector organisations is a limitation in this research. It is unlikely that the databases compiled for this project are exhaustive. Furthermore, they are likely to undercount those individuals or organisations that are informal, small, part-time and do not belong to a representative body" (DAC National Mapping Study, 2014).

(because larger firms contribute most to GDP), may significantly under-estimate employment in the sector.

The UNESCO Framework for Cultural Statistics (2012) also acknowledges the difficulty of capturing small firms, particularly those in developing countries, who are operating in the informal sector. A study in Mali (2008) on the "Economy of Culture" found that the informal economy in the cultural sector made up 85% of the economic value generated by the CCIs (as compared to an average of 57% for the rest of the economy).

Another limitation of the survey method is that the information is self-reported, that may be over or under reported, either because of human error in estimation, or because of some deliberate strategy, such as avoiding tax (DAC National Mapping Study, 2014:22).

One of the most important pieces of self-reported information collected was the monthly turnover or income of CCIs in the interview sample, which was used in the calculation of the economic impact of the industry. However, only 741 (30%) of the sample provided this information, only 654 of which gave values great than zero. The range was enormous, with a maximum value of R950 000 and a minimum of R200 per month. The average value (excluding those with zero turnover) was R32 755 per month, but the median was R7000. Working with such a small data set, with such large variance, can result in less reliable results, especially when the data is further divided into the different domains and sub-groups.

International mapping study guidelines and studies agree that the use of official government data, while sometimes not very specific to CCI categories and with its own potential reliability problems, can provide a number of benefits not available through the collection of primary survey data. These include:

- The ability to conduct international comparisons, especially if the International Standard Classification codes are used for the identification of Industries, Occupations and Products;
- The ability to track changes in the CCIs over time, since government data is collected annually and sometimes even more frequently;
- The ability to track indicators such as industry concentration, gross value added and international trade in cultural goods and services.

In addition, the use of existing secondary data is likely to be much more cost effective than the collection of primary survey data, have wider coverage, and does not rely solely on self-reported financial figures.

Higgs and Cunningham (2008) also point out that creative people may be employed in non-creative industries. By making careful use of industrial classification and labour force survey data, they show that studies that do not take this kind of employment into account may have under estimated the employment impact of the CCIs by up to 40%. The "Creative Trident" approach to CCI employment includes and can distinguish between:

- "Workers with a cultural profession working in a cultural sector (e.g. an artist in an opera);

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

The approach can also be applied to the value of the annual income generated by each of these groups of workers and their impact on the economy, as well as having the ability to track changes in CCI workforce composition over time.

6. Methodological comparison with the Gauteng (2008) study

One way of examining the methodological soundness of a research project is to compare it to the results of similar research that has been undertaken in the same region or country. The DAC (2014) study is the first national level mapping study of the CCIs in South Africa, but there are some regional CCI mappings. One of the most comprehensive is the study done in Gauteng (2008), which was undertaken jointly by Wits University in collaboration with the British Council. This section of the report compares the methods and some results of the DAC (2014) study and the Gauteng (2008) study.

Although the two studies used quite similar methods in terms of defining the population of CCIs and the focus of their interviews, they are not directly comparable. This is mostly because the Gauteng study was conducted before the UNESCO Framework for defining Cultural Domains (2009) was published and the study thus used a somewhat different classification system.

As shown in Table 2, there is considerable overlap between the categories used for classification of the CCIs between the two studies. There are, however, a few areas where there is no, or limited correlation. One of the largest is under UNESCO category F: Design and Creative Services. The Gauteng study does not include Landscape Design, Architecture or Advertising. Since these are the more commercial CCIs firms, they tend to be larger and also to have higher than average turnover, resulting in a considerable difference in the two studies in this Domain.

Table 2: A comparison of CCI definitions

UNESCO Cultural Domains	**Gauteng Study**
A. Cultural & Natural Heritage: Museums, Archaeological and Historical Places, Cultural Landscapes and Natural Heritage	3. Cultural tourism & Heritage: Tangible heritage, built heritage, musical and audio-visual heritage, textiles and clothing, Natural heritage, reserves, fauna & flora. Related activities included libraries and archives, tourist information provision, transportation, accommodation, restaurants, sale of heritage at auction, galleries and stores.
B. Performance & Celebration: Performing arts, Festivals, Feasts & Fairs, Music (live & recorded performance, composition, digital music, musical instruments)	7. Music: Including creators, publishers, recorder companies, manufacture, broadcast, education & training and funders. 8. Performing arts
C. Visual Arts & Crafts: Fine Art, Crafts (including decorative crafts and commercially produced crafts with a "traditional character"), Photography (including exhibition spaces)	2. Craft: Origination, design & production of traditional art, designer goods, craft art, functional wares and souvenirs. 10. Visual arts: Fine arts, photography & support industries (galleries, curators, editors, critics).
D. Books and Press: Books, Newspapers, Periodicals (includes electronic or virtual forms, such as e-books), Libraries and Book Fairs	9. Print media (newspapers, magazines) and Publishing (books, but developing into online publishing); Also includes retail (bookshops, online distribution)
E. Audio-Visual & Interactive Media: Radio, Television & Internet broadcasting/live streaming, Interactive Media (Video Games and Online Games; Websites related to social media). Not including software and computers.	1. Audio-Visual: Film, TV & Radio (including generation of content, production & distribution); Media-related activities; Specialised education & training and other support services. 6. Multimedia: Computer technology, animation and multimedia companies.
F. Design & Creative Services: Fashion, Graphic & Interior Design, Landscape Design, Architecture & Advertising Services.	4. Design: Industrial design, Graphic design, Interior design (Not including Software design). 5. Fashion design

The Gauteng study also has much less of an emphasis on online activities in both the publishing (Books and Press) and Audio-Visual and Online Media categories. Tourism, included in category 1 of the Gauteng study, is regarded as a "Related" domain in the UNESCO classification system and is thus not included in the 2014 study. Visual Arts and Crafts includes commercially produced crafts in the UNESCO classification, as long as they have some "traditional character". These differences mean that the studies are not directly comparable, but that there is enough overlap in most categories to allow some instructive comparison.

Table 3: Methods - Defining the population

DAC Study	**Gauteng Study**
Internet Search	Extensive Internet search
Contacting Key Institutions	Contacting Industry Bodies
Contacting Newspapers/Magazines	Searching through listings (companies, individuals, performances, venues) in newspapers and sector specific publications.
Contacting Union Bodies	Contacting Industry Bodies
Purchasing Pre-Existing Databases	Discussion with the "technical" committee
Snowball sampling	Interviews (snowball sampling)

In terms of the research method used, both studies chose to construct their own databases, rather than to use secondary, national-level data. As shown in Table 3, both studies used very similar methods in order to define the population including: internet searches, contacting key institutions and industry bodies for information on members, searching or contacting the media, and using snowball sampling (requesting information on other CCIs from those being interviewed). The only significant difference was that the DAC study also purchased pre-existing database, while the Gauteng study used discussion with the technical committee.

Both studies conducted pilot studies to test the survey instrument. In terms of sampling, the Gauteng study used stratified (by small versus large firms) random sampling, while the DAC study simply used random sampling. Both studies used face-to-face interviews and telephone interviews. In the DAC study, both kinds of interviews used the same questionnaire and took between 40 and 50 minutes to complete. A total of 738 interviews were conducted in Gauteng Province. In the Gauteng (2008) study, two versions of the questionnaire were used: an in-depth, 40 minute questionnaire for the face-to-face interviews (190 conducted), and a shorter version used for the telephone interviews (538 conducted) that focused on employment, turnover, costs and funding.

As expected, Table 4 reveals some interesting differences between the two studies. In terms of the number of CCI firms in Gauteng, both studies found fairly similar results (between 11 000 and 12 000). However, the DAC (2014) study allowed for some under-counting (20%). Thus the number of firms traced in the DAC study (9 290) was actually somewhat lower that the Gauteng study.

Table 4: A comparison of the number of firms by domain

Domain	Gauteng Study (%) [ranking]	DAC Study (%) [ranking]
Design and Creative Services	30 [2]	34 [1]
Visual Arts and Crafts	31 [1]	13 [3]
Performance and Celebration	14 [4]	28 [2]
Audio-Visual and Interactive Media	15 [3]	13 [3]
Books and Press	2 [6]	10 [4]
Cultural and Natural Heritage	8 [5]	3 [5]
Total	100%	100%
Total number of firms	11 320	12 113

In terms of the percentage of firms in each domain, there are some large differences. For example, despite the fact that the Gauteng (2008) study did not include Landscape Design, Architecture or Advertising in the Design and Creative Service domain, both studies find that this domain makes up about a third of the sector. Conversely, despite their relatively similar definitions of the Visual Arts and Crafts domain, the DAC study finds this sector to be less than half the size (13% of all CCI firms in Gauteng) of the Gauteng study (31% of all CCI firms in Gauteng).

As expected, since the Gauteng (2008) study did not include arts festivals, it found that the Performance and Celebration category was much smaller (14%) than the DAC study (28%). By order of magnitude, the biggest difference was in the Information, Books and Press category, which the Gauteng study found to make up only 2% of the CCIs in the province, while the DAC study found that it was five times as large (10%). This may be because of the stronger inclusion (and development) of electronic and virtual forms of publishing in the DAC study. Finally the Gauteng study found Cultural and Natural Heritage to be larger (8%) than the DAC study (3%), probably because the Gauteng study included tourism related activities, while the DAC study did not.

Looking at the rankings, some patterns to emerge from both studies. Both studies agree:

- Design and Creative services is large (ranked at either 1 or 2)
- Books and Press and Cultural and Natural Heritage are the smallest domains (ranked last)
- Audio-visual and Interactive media make up between 13% and 15% of CCIs in Gauteng

Major differences are:

- The size of the Visual arts and Crafts sector
- The size of the Performance and Celebration sector

Table 5: A comparison of firm characteristics

	Variable	Gauteng Study	DAC Study
Ownership	Black, coloured, Indian	"Majority white"	50%
	Male	[not reported]	69.4%
	Up to 35 years old	37%	36%
Firm Age	Years	34% < 4 yrs 44% 10 + yrs	36.4% < 8 yrs 52.8% , 12 yrs
Organizational structure	Close Corporation	44%	35%
	Pty. Ltd.	18%	25%
	Non-Profit	11%	17%
Member of Industry association/body	Members	54%	35.8%
Employment Type: average number per firm (percentage)	Full Time	13.1 (56%)	7.4 (36%)
	Part-time	2.3 (10%)	5.6 (27%)
	Freelance/Contract	8.1 (34%)	7.8 (37%)

Both studies found that owners of CCI firms included a significant number of young people (35 years old or less), and that the sector was dominated by smaller firms. The firm age group categories were different, but the comparison seems to show that the DAC study picked up a smaller proportion of younger firms (as discussed elsewhere in this report). Both studies found that the most common organisational structure was a Close Corporation. The 2008 study found that more than half (54%) of firms belonged to an industry body or association, while only about 36% of the 2014 study sample did. There were also some differences in the average number of employees: 23.5 people in the 2008 study and 20.8 in the 2014 study (probably as a result of the stratified sampling used in the 2008 study, which included more large firms). This might also be the reason for the much higher percentage of full-time employees found in the 2008 study (56% compared to 36%).

Both studies found that firms derived most of their income from direct sales and services to the public (77% in the DAC study and 75% in the Gauteng study). The DAC study found that 29% of Gauteng CCIs derived some income from local, provincial or national government grants, but that this made up the main source of income for only 12.5% of firms. Similarly, the Gauteng (2008) study found that 25% of firms had applied for government funding in the last two years.

The studies differ markedly in terms of their finding about export markets. The DAC study found that only 26% of CCI firms in Gauteng sold any of their goods or services to foreign buyers. Those that did sold only about 22% of their products and services to export markets. On the other hand, the Gauteng (2008) study found that most sectors had reasonably high levels of exports, with the most active sectors being audio-visual (61%), multimedia (55%) and music (54%). The craft sector had the lowest export level at 31%.

Table 6: A comparison of economic impact and employment

Variable	Gauteng Study	DAC Study
Turnover p/a (in 2014 prices)	R46.07b	R96b – R114b
Value added p/a (2014 prices)	R14.73b	R53b – R63b
Direct employment	63 000	90 260
Total employment impact	182 000	197 450

As discussed earlier in this report, the economic impact study in the DAC (2014) report was based on the relatively small percentage of firms that agreed to divulge their financial data, thus making this section of the report less reliable. The Gauteng (2008) study also reported that some firms were not willing to share their financial data, reducing the reliability of the estimates. However, nearly all respondents in the DAC study answered questions on the employment numbers, making at least the direct employment numbers more reliable.

Keeping in mind the different ways in which the studies defined the cultural industries and that the 2008 study stratified the sample (thus included more large firms) it can be seen from Table x, that turnover per annum of the cultural industries in Gauteng (in 2014 prices) appears to have increased between 2008 and 2014. The differences in magnitude of the growth between turnover and value added make the results somewhat difficult to interpret. Similarly, direct employment in 2014 was a third more than in 2008, but the total employment (including indirect employment) figures are quite similar. Nevertheless, there seems to be at least some evidence that the sector did experience some growth between 2008 and 2014.

In conclusion, the comparison shows that, although different CCI classification systems were used, both the DAC (2014) and the Gauteng (2008) studies used quite similar methods in defining the population

and, to a certain extent, in generating a sample for interviews. The studies are of comparable sizes (based on 728 interviews in the 2008 study and 738 interviews in the 2014 study). Both studies found that the Design and Creative services domain in Gauteng is large, that Books and Press and Cultural and Natural Heritage are the smallest domains and that the Audio-visual and Interactive media domain makes up about 14% of CCIs in Gauteng. Both studies found quite similar firm structures, although there are some large differences in employment type and number that can probably be explained by the stratified sampling technique used in the 2008 study that resulted in the inclusion of more large firms. Both studies found that only a sub-set of firms were willing to share their financial data, making these estimates less reliable than, for example, employment data.

Although a direct comparison of the results is not possible because of differences in classification systems, sampling techniques and time period, the results of the two studies are not so different that either of them are invalidated. Where there are differences, they can (at least to some extent) be explained by the differences in classification of the CCI domains and/or sampling technique. Large differences in financial data may be the result of the small sample of firms who were willing to divulge this information. It is thus concluded that this comparison supports the validity of the DAC (2014) study results in Gauteng province.

7. The way forward

Many of the mapping studies and guides reviewed emphasised that the completion of a mapping study is the beginning of a process, rather than the end of a project. For the study to have value, the results need to be presented in useful and interesting ways to all the various stakeholders. Also, a map of the creative industries needs to be a "living" document that is continually updated, added to and analysed to increase the understanding of the CCIs over time. This section of the report addresses the dissemination of the findings of the 2014 DAC Mapping Study as well as making recommendations for taking the work forward in the future.

6.1 Dissemination of current findings

> "The mapping study needs to draw out a clear story about the creative industries from the evidence that has been collected. This can then be tailored towards the audience at which the project is aimed" (Mapping the Creative Industries, British Council, 2010:49).

As already mentioned, mapping studies can be useful in a number of ways and to multiple stakeholders. However, the challenge is to present the results in such a way that they are relevant, easily comprehensible and useful to various groups. While a comprehensive report may be most useful to government officials in specialist departments and researchers, it is unlikely to be read by a wider audience.

One of the concerns highlighted by "many" of participants of the South African mapping study (2014:22) was that they would not benefit from the study, in that that results would not be used for the benefit of those in the industry. They also expressed a wish to receive feedback, once the study was completed. To this end, it is suggested that the results of the mapping study are made available in a number of ways:

- As a research report, available online via the Cultural Observatory website;
- As a series of 2 page information sheets, with data presented in a visually appealing and interesting way through the use of information graphics for each domain and for each province (where the sample size warrants this) available online via the Cultural Observatory and as a limited number of hardcopies;
- In a series of media reports, including online newsletters, such as *The Conversation;*
- In at least one workshop or presentation to public servants and industry;
- As conference papers presented at local and international academic conferences;
- Publication in accredited academic journals.

6.2 Research: The SA Framework for Cultural Statistics

In order to advance understanding and evidence-based policy formulation in the CCIs in South Africa, the mapping study needs to be taken forward. As reviewed in this report, most mapping studies start with an analysis of existing national statistical data collected by government, followed by the collection of primary data in order to fill gaps and verify national data. The South African approach has been somewhat the other way around, although a study was commissioned by DAC entitled "South African Framework for Cultural Statistics: Classification Guide for the South African Framework for Cultural Statistics (SAFCS)" (2014). This report followed on from the conceptual framework that was completed in 2013.

The main findings of the report are that the International Standard Industrial and Central Products Classification codes currently in use by Statistics South Africa provide much detailed information and make a good starting point for both mapping the CCIs at a national level and for working towards a system of Cultural Satellite Accounts which could be used to determine the economic impact and job creation potential of the CCIs.

> "South Africa has key data sets and publications which contain existing codes relevant to culture…Much of the cultural framework is well served by the standard industry definitions" (SAFCS, 2014).

The report does outline some limitation of the available national level data (also highlighted in the international studies reviewed). Some classification systems are considered outdated, and some categories may be too broad. To manage this latter problem, however, some weighting guidelines have been developed (see, for example, the UK *Toolkit*, Appendix 2). The SAFCS puts forward a method for measuring cultural activities, cultural products and cultural occupations (guided by the UNESCO (2009) framework of the various cultural domains).

Phase 3 of the SAFCS project would be to test the Framework by populating it with data, and to identify policy-relevant indicators for each domain or activity. The results could be usefully compared to the 2014 DAC Mapping Study results, which used primary survey data.

While the SAFCS approach would face some methodological challenges, and would probably not solve the problem of how to include the informal sector, the results produced would be internationally comparable, and would lend themselves towards time series analysis. It is thus recommended that Phase 3 of this project be commissioned as soon as possible.

6.3 Phases of the research

To achieve the goal of a "living" mapping study, it is important to focus research efforts in a number of directions. On order to chart the way forward, the following three Phases of mapping study research are suggested:

Phase 1: Production of the information sheets:

- The provincial status of the Cultural and Creative Industries (CCIs) for the country as a whole and following provinces will be produced with the help of a specialist in cultural information graphics design: Eastern Cape; Western Cape; Gauteng; KwaZulu-Natal;
- Information sheets on the status of the CCIs by sector (using the UNESCO categories) will be produced for the following sectors: Design and Creative Services; Visual Arts and Crafts; Performance and Celebration.

- The results of this analysis will be presented at a stakeholder workshop in Johannesburg to be held on 19/2/2016. Discussion and feedback from the workshop will be incorporated into producing the next phase of work.
- The results will also be presented at a National Conference in Port Elizabeth to be held on 22 and 23 March 2016.

Phase 2: Information sheets and research

This phase focuses on the incorporation of discussion and feedback from the workshop and conference, on deeper analysis of existing data, and on planning the commissioning of the next phase of the research.

- Information sheets on the provincial status of the Cultural and Creative Industries (CCIs) for the other provinces will be produced.
- Information sheets on the status of the following CCIs by sectors (using the UNESCO categories) will be produced: Cultural & Natural Heritage; Information, books and press; Audio-visual and interactive media.
- Scientific research outputs based on a deeper analysis of the data will be produced, presented at national and international conferences, and submitted to academic journals for publication. The results will also be make available as 800 word Policy Briefs. The planned areas of research include, but are not limited to: An analysis of job creation and transformation in the South African CCIs; and CCIs and regional development: An analysis of the relationship between the CCIs and municipal level regional economic development.

Phase 3: Mapping the CCIs

As discussed in section 6.2 of this report, the next phase of the research is to commission further exploration of national-level data relating to the CCIs. In this phase, the Cultural Observatory will work with research partners to populate the South African Framework of Cultural Statistics and to analyse the data. As with the 2014 DAC Mapping Study, results will be disseminated to stakeholders in a number of ways including workshops, media, publication and policy briefs.

This phase of the work also seeks to identify gaps in data and knowledge about the CCIs in South Africa. Depending on the gaps identified and the policy needs, a number of potential projects could be undertaken, focusing more closely on particular sectors or regions. For example,

- Studies at a regional or municipal level, using a case study approach, could link to the growing international focus on "creative regions" and "creative cities"; and/or
- In-depth case studies of some CCI sectors, using a sample of telephone interviews, key stakeholder interviews and existing secondary data (e.g. from SARS and *TradeMap*), with the 2014 mapping study as a baseline, such as the film industry; music industry; fashion industry; and/or
- A series of "state of the sector" reports on things like: Craft; Festivals; Museums in South Africa, using the 2014 mapping study as a starting point, but focusing on qualitative data (especially for sectors like museums that have big non-market benefits and don't charge entrance fees).

8. Concluding comments

Mapping studies of the Creative and Cultural Industries (CCIs) can be a useful way to raise the profile of the industry, benchmark development, provide evidence of the economic importance of the industry, and identify potential areas of growth and policy intervention. The aim of this report was to evaluate the methodology of the DAC (2014) Mapping Study, which was the first national mapping study in South Africa and to provide recommendations for the way forward.

The South African mapping study commissioned by DAC and conducted by Plus94, compiled a database of 24 756 CCIs, and interviewed a sample of 2 477 of them. A review of international best practice revealed that, while the use of primary data has some advantages, it is only recommended when national-level secondary data is not available or where it is completely unreliable or out of date. While the survey method does have some advantages, estimation of the "universe" (or population) is difficult, and self-reported financial data may be unreliable. Only one in ten of the firms contacted agreed to participate in the study, and only 30% of these provided information on turnover. The report on the SA Framework for Cultural Statistics (SAFCS) (2014) showed that South Africa does have "key data sets" at national level that could be used to map the CCIs. This is also the first step in compiling a system of Cultural Satellite Accounts.

Recommendations are that (i) Data from the 2014 Mapping Study be disseminated to stakeholders in various forms so that (as recommended by various guides) the study helps to raise the profile of the CCIs and is useful to those in the industry itself and to policymakers; and (ii) Phase 3 of the SAFCS (populating the framework with data) should be implemented so that national-level data can be used to supplement the survey data already collected. The use of national-level data has some advantages, such as its use in tracking changes over time and in making international comparisons.

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