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NELSON MANDELA
UNIVERSITY

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# Transformation, ownership and employment in South Africa's cultural and creative industry (CCI) and creative economy

Submitted to the Department of Arts and Culture

MEASURING & VALUING SOUTH AFRICA'S CULTURAL & CREATIVE ECONOMY

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# South African Cultural Observatory

# Research Report 5 (of 5): Transformation, ownership and employment in South Africa's cultural and creative industry (CCI) and creative economy

**December 2017**

**Final Report**

Submitted to the Department of Arts and Culture:

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## Acronyms

| | | |
|---|---|---|
| AFS | : | Annual Financial Statistics |
| CCI | : | Cultural and Creative Industries |
| CPC | : | Central Product Classification |
| CSA | : | Cultural Satellite Accounts |
| CSAM | : | Cultural SAM |
| CFCS | : | Canadian Framework for Culture Statistics |
| DET | : | Department of Education and Training |
| DAC | : | Department of Arts and Culture |
| DTI | : | Department of Trade and Industry |
| EBOPS | : | Extended Balance of payment Services Classification |
| FCS | : | 2009 UNESCO Framework for Cultural Statistics |
| GDP | : | Gross Domestic Product |
| GVA | : | Gross Value Added |
| HS | : | Harmonised Commodity Description and coding system |
| ICATUS | : | Intelligent Classification of Activities for Time Use Statistics |
| ICH | : | Intangible Cultural Heritage |
| ICT | : | Information and Communication Technology |
| ILO | : | International Labour Organisation |
| IO | : | Input Output Table |
| IP | : | Intellectual Property |
| ISCO | : | International Standard Classification of Occupations |
| ISIC | : | International Standard Industrial Classification |
| MEIA | : | Macroeconomic Impact Assessment Model |
| NMMU | : | Nelson Mandela Metropolitan University |
| OECD | : | Organisation for Economic Co-operation and Development |
| OFO | : | Organising Framework for Occupation |
| RSA | : | Republic of South Africa |
| SAM | : | Social Accounting Matrix |
| SACO | : | South African Cultural Observatory |
| SASCO | : | South African Standard Classification of Occupations |
| SIC | : | Standard Industrial Classification |
| SNA | : | System of National Accounts |
| SU | : | Supply and Use Tables |
| Stats SA | : | Statistics South Africa |
| TSA | : | Tourism Satellite Accounts |
| UIS | : | UNESCO Institute for Statistics |
| UN | : | United Nations |
| UNCTAG | : | United Nations Conference on Trade and Development |
| UNSESCO | : | United Nations Educational, Scientific and Cultural Organisation |
| QLFS | : | Quarterly Labour Force Survey |

## 1. Introduction and background

This ***Research Report 5*** is the final in a series of five reports that have been produced in response to a specific request from the Department of Arts and Culture (DAC) and the South African Cultural Observatory (SACO) to support the development of a National Research Agenda (NRA) for the cultural and creative industries (CCIs) of South Africa. The scope of work and deliverables for this research study are presented in 5 separate reports, as well as an additional report which provides a synthesis of the main findings of the entire study. Table 1 below reflects the scope of work undertaken in this report and the broad details of the various other reports within which each research topic is addressed.

### *1.1 The National Research Agenda (NRA) for the CCIs*

The DAC has developed the NRA for research across the arts, culture and heritage (ACH) sectors and the CCIs of South Africa. The Agenda is an attempt by the DAC to focus research efforts and resources towards achieving research outputs that would enhance the development of the CCIs in South Africa. It also serves to support the many policy imperatives of the Department, the South African Government and its stakeholders.

### *1.2 The South African Cultural Observatory (SACO)*

Initiated by the DAC through the Mzansi Golden Economy Strategy (2011), the South African Cultural Observatory (SACO) is a statistical and socio-economic research project, launched in 2014, which charts the socio-economic impact of the ACH sectors and the CCIs in South Africa. The SACO is headquartered in Nelson Mandela Bay where it is hosted by Nelson Mandela University on behalf of the DAC in partnership with Rhodes University and the University of Fort Hare.

### *1.3 The economic mapping study*

As indicated in the scope of work for this study, which has been commissioned by Nelson Mandela University (NMU), this study report is one of a number of research reports that are being commissioned by the SACO that are related to the National Research Agenda and the mapping of the South African CCIs, as defined in accordance with the 2009 UNESCO Framework for Cultural Statistics (CSF).

### *1.4 Scope of work and research reports*

The terms of reference for this study specifies that it will primarily be of a desk-top nature, though interviews with select stakeholders could add value. The engagement will also require interaction with the project team from Rhodes University – which compiled the employment and international trade components of the mapping study – to ensure that their findings are reflected where relevant to this study.

Table 1 below presents the scope of work for this study, along with the various technical reports that have been produced within which each element of the scope of work is addressed in detail.

*Table 1: Scope of work and research reports*

| Scope of Work | Research Reports |
|---|---|
| **Employment Analysis**:<br>• Define levels of cultural employment and illustrate growth overtime compared to GDP growth and growth in non-cultural jobs | **Research Report 1**: Employment in the Cultural and Creative Industries in South Africa |
| **International Trade Analysis**:<br>• Define the levels of cultural goods trades between South Africa and its BRICS partners relative to the country's total trade in cultural goods | **Research Report 2**: South Africa's trade in cultural goods and services with a focus on cultural trade with BRICS partners |
| **Macroeconomic Impact Analysis**:<br>o The contribution of the CCIs towards GDP (economic output), as well as demonstrating the relative size of the CCIs sector in relation to other economic sectors across the UNESCO-defined domains<br>o An estimation of the forward and backward linkages (multipliers) in the CCIs sector itself, as well as linkages with other economic sectors | **Research Report 3:** The Macroeconomic Impact Assessment Modelling System and Macroeconomic Impact Analysis of the Cultural and Creative Industries Sector |
| **Provincial, Location and Cluster Analysis**:<br>o Provincial distribution of the CCIs (as per the macro-economic analysis stated above – this section includes maps detailing provincial distribution patterns)<br>o Identification of possible clusters within the CCIs (this includes maps pertaining to the relevant findings)<br>o Transformation and ownership levels from a provincial perspective<br>o Employment from a provincial perspective | **Research Report 4**: Provincial Location and Clusters of the Cultural and Creative Industries Sector in South Africa |
| **Shifting Transformation and Ownership Analysis**:<br>o Determine the transformation and ownership patterns within the South African CCIs across the UNESCO domains, noting that transformation and ownership levels must also be presented in the above-mentions section dealing with provincial distribution and clustering | **Research Report 5**: Transformation, Ownership and Employment in the Cultural and Creative Industries |

Within this context, the study must make use of the following data sources:

- The 2009 UNESCO Framework for Cultural Statistics (FCS);
- National-level audited trade and economic data from Statistics South Africa (Stats SA) and other relevant national entities;
- The other abovementioned SACO Mapping Reports including, the Cultural and Creative Industry Employment Report and the International Trade and Cultural Goods Report;
- The 2014 DAC National Mapping Report prepared by Plus94 Research; and

- Data from industry bodies and any other reliable national level data sources.

### 1.5 Purpose of report and report structure

The purpose of this study is to (a) highlight key macroeconomic findings relating to South Africa's CCIs, and (b) provide interpretation and analysis of the data as it pertains to policy development and implementation in accordance with the 2011 National Development Plan (NDP) and relevant policy initiatives of the arts and culture department.

This report focuses on the topics of transformation, ownership, and employment in the CCIs of South Africa. In addressing these topics, a review has been undertaken of the NDP and the DAC Strategic Plan in order to provide a context for the transformation, ownership, and employment results presented in this document. In addition, a review has been undertaken of relevant reports provided by the DAC that address this topic, as well as a number of other published documents.

Section 2 deals with the topics of transformation and ownership in the CCIs, while Section 3 deals with the topic of employment in the CCIs in more detail.

## 2. Transformation and ownership in South Africa's CCIs

This section provides a review of the National Development Plan (NDP) 2030 and the Department of Arts and Culture (DAC) Strategic Plan 2015/16 - 2019/20, and highlights where these plans focus on transformation, ownership, and employment equity. A review has also been made of two research reports provided by the DAC that relate to these topics, as well as an analysis of CCI businesses that are listed on the Johannesburg stock exchange.

### 2.1 The National Development Plan 2030

The NDP aims to eliminate poverty and reduce inequality by 2030[1]. According to the document, South Africa can realise these goals by drawing on the energies of its people, growing an inclusive economy, building capabilities, enhancing the capacity of the state, and promoting leadership and partnerships throughout society. It also envisions a South Africa where everyone feels free yet bounded to others; where everyone embraces their full potential; and proposes that South Africa should be a country where opportunity is determined not by birth, but by ability, education and hard work. Realising such a society will require transformation of the economy and focused efforts to build the country's capabilities. To eliminate poverty and reduce inequality, the NDP argues that the economy must grow faster and in ways that benefit all South Africans.

In particular, young people deserve better educational and economic opportunities, and focused efforts are required to eliminate gender inequality. Promoting gender equality and greater opportunities for young people are integrated themes that run throughout the NDP. Social

[1] National Planning Commission, Department: The Presidency. National Development Plan 2030, Executive Summary.

cohesion needs to anchor the strategy. If South Africa registers progress in de-racializing ownership and control of the economy without reducing poverty and inequality, transformation will be superficial. Similarly, if poverty and inequality are reduced without demonstrably changed ownership patterns, the country's progress will be turbulent and tenuous.

### *2.2 Department of Arts and Culture Strategic Plan 2015/16 - 2019/20*

The DAC carries a special responsibility to guide and direct the unique policy mandate of leading the vision of a non-racial, non-sexist and democratic South Africa[2]. The Department's obligation to lead nation-building and its commitment to the central principles of the Constitution are also guided by the recognition that a socially cohesive society must be based on equity, on redressing past imbalances, and on a progressive improvement of the quality of life of the poor. Under the banner of "radical socio-economic transformation", with the NDP as an overarching policy framework providing a visionary roadmap,[3] the Department has identified the following key policy priorities:

- An enabling policy, legislative and regulatory environment;
- Inclusive economic development;
- Nation building and social cohesion programmes;
- Infrastructure development and maintenance;
- The Cultural and Creative Industries Fund (CCIF);
- Skills development and education;
- Cultural diplomacy;
- Arts, Culture and Heritage (ACH) sector strategies and plans;
- Sustaining ACH and the Cultural and Creative Industries; and
- Effective governance and implementation institutions.

The above priorities will assist in further strengthening the work that must be done in the implementation, monitoring and coordination of development and nation-building. These priorities further lay the foundation and high-level tone of this Strategic Plan – a plan that, not only informs the work of the DAC, but also seeks to ensure policy and planning coherence across the entire ACH and CCI sectors.

In line with the NDP and the 2014/19 Medium Term Strategic Framework (MTSF 2014-19), DAC's Strategic Plan sets out clear goals for social cohesion and the transformation of the creative economy in South Africa, and the mechanisms through which will guide and support the industry's development. It outlines, furthermore, how the sector must be transformed in order to "contribute to establishing a caring and humane society, how it must change to accommodate the full range

2 Department of Arts and Culture. Strategic Plan 2015/16 - 2019/20.
3 It is worth noting that the NDP does not mention nor does it espouse the notion of "radical socio-economic transformation".

of needs of a transformed ACH Sector, and the instruments that should be put in place to drive our programmes”.[4]

The DAC Strategic Plan has 5 Strategic Outcome Orientated Goals. These are

- ***A transformed, coherent and development focussed ACH sector:*** To drive greater policy and planning coherence in the sector towards the achievement of sectoral development outcomes;
- ***Nation building through effective social cohesion programme implementation:*** To lead nation building and societal transformation through effective social cohesion programmes that promotes cultural and linguistic diversity;
- ***A productive, diverse and inclusive ACH sector:*** To protect, preserve, promote and develop Arts, Culture and Heritage and advance the socio-economic inclusivity and contribution of the sector;
- ***A sound governance fiscal management system:*** To forge sound governance and fiscal management policies, systems and processes that enhances the capacity of the DAC and its entities to ensure the effective and efficient utilisation and leveraging of ACH resources for the benefit of all South Africans; and
- ***A professional and capacitated ACH sector:*** To build the skills and capacity of the Sector to ensure its ongoing development and responsiveness.[5]

With regards to transformation and ownership in the CCIs, the DAC Strategic Plan has the following to say that is relevant to this study:

- Sector planning in the department must take into account a wide range of policy imperatives that seek to support inclusive growth paths that advance economic growth and the social and economic transformation agenda;
- As both a subject and agent of transformation, the reality is that the ACH service delivery environment continues to be marked by historical inequalities across race and geographical location;
- In 2011, the Department embarked on an ambitious effort to strategically re-orientate itself towards the transformation of the ACH sector. Prior to 1994, the sector consisted of racially segregated entities that were governed, managed, and funded in different ways. They served different population groups, and their location was determined by apartheid planning. Although there was evidence of some services to black communities, budget programme offerings were of poor quality and were largely seen as unresponsive to the needs of society at large. The challenge was therefore to transform the existing racially divided system into a coherent system that would address the economic and employment needs of a democratic and developmental South Africa in the 21st Century. The process of repositioning the Sector is ongoing; and

4 Department of Arts and Culture. Strategic Plan 2015/16 - 2019/20.
5 *Ibid*.

- Slow transformation of the ACH Sector i.e. the structures and operational models of the DAC and its institutions must be redesigned and remodelling to improve the accessibility of ACH resources to the historically disadvantaged.[6]

### *2.3 Review of relevant literature*

Two key research reports provided by the DAC that deal with the topic of transformation and ownership in the CCIs have been reviewed:

- The DAC National Mapping Study report prepared by Plus 94 Research in 2014; and
- The Transformation and Job Creation in the Cultural and Creative Industries in South Africa report submitted to the DAC in September 2016.

In addition to these two research reports, a review has been made of documentation related to share ownership of companies listed on the Johannesburg Stock Exchange.

#### *2.3.1 The DAC "National Mapping Study" (2014)*

This national creative industry mapping study had the following objectives:[7]

- Determining the size of the creative industries sector;
- Determining the number of jobs created by the sector;
- Determining the percentage contribution to the national GDP of the sector;
- Determining the economic multiplier of the sector to the GDP;
- Assessing the value of the sector across the value chain;
- Establishing the number of companies that are doing business in the sector;
- Establishing the number of individuals employed in the sector (including permanent employees and freelancers);
- Evaluating the direct and indirect taxes that the sector pays;
- Identifying the general business characteristics (age, structure of ownership, business activities);
- Identifying existing markets (both product markets and geographical markets);
- Assessing the skill levels of those employed within the sector (by identifying any skills gaps and shortages);
- Evaluating any regulatory issues that are relevant to the sector (e.g. competitive, legal and environmental);
- Identifying key competitive pressures that may exist;
- Identifying recent trends in the sector related to business growth (number of employees, turnover, profitability, etc.);
- Establishing the number of businesses (by size, sub-sector, region, value chain function)

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6 *Ibid*.
7 Plus 94 Research. September 2014. DAC National Mapping Study.

- Determining the gross value added by the sector (by business, sub-sector, value chain function, employee);
- Assessing the ownership patterns (the percentage shareholding thereof);
- Conducting an analysis of the source and use of the funds in the industries, especially the use of the funds provided by the government and private donors, if any; and
- Conducting a comparable trends analysis which will seek to benchmark sector issues that exist in South Africa with those of territories around the world.

As part of this research exercise, a database of cultural industry companies was created. The table below reflects the number of companies in this database, sorted by Cultural Domain and province.

| Segment | Total | Limpopo | Mpumalanga | Gauteng | Western Cape | Eastern Cape | Northern Cape | North West | Free State | Kwa-Zulu Natal |
|---|---|---|---|---|---|---|---|---|---|---|
| Cultural & Natural heritage | 1,958 | 132 | 86 | 451 | 518 | 214 | 50 | 66 | 56 | 385 |
| Performance & celebration | 3,747 | 85 | 84 | 1,914 | 797 | 183 | 49 | 84 | 82 | 469 |
| Visual Arts & Crafts | 3,455 | 135 | 142 | 1,178 | 921 | 247 | 47 | 59 | 137 | 589 |
| Information, Books & Press | 2,077 | 70 | 62 | 947 | 544 | 99 | 26 | 32 | 41 | 256 |
| Audio-visual & Interactive Media | 1,242 | 24 | 43 | 682 | 318 | 50 | 4 | 11 | 16 | 94 |
| Design & Creative Services | 10,592 | 192 | 215 | 4,922 | 2,900 | 558 | 52 | 147 | 250 | 1,356 |
| **TOTAL** | **23,071** | **638** | **632** | **10,094** | **5,998** | **1,351** | **228** | **399** | **582** | **3,149** |

A total of 2 451 telephone-based interviews were conducted nationally with a sample of companies drawn from this database. As regards ownership, respondents were asked the following questions:

| | |
|---|---|
| **Q5: What is the race of the principal or majority owner(s) of your business or organisation? SELECT ALL THAT APPLY.** | |
| Black | 1 |
| White | 2 |
| Indian/Asian | 3 |
| Coloured | 4 |
| Other | 5 |
| Not Applicable | 6 |
| **Q6: What is the gender of the principal or majority owner(s) of your business or organisation? SELECT ALL THAT APPLY** | |
| Male | 1 |
| Female | 2 |
| Not Applicable | 3 |
| **Q7: What is the age of the principal or majority owner(s) of your business or organisation? SELECT ALL THAT APPLY** | |
| Below 18 years | 1 |
| 18-24 years | 2 |
| 25-34 years | 3 |
| 35-44 years | 4 |
| 45-54 years | 5 |
| 55 years and older | 6 |
| Not Applicable | 7 |
| **Q8: What is the nationality of the principal or majority owner(s) of your business or organisation? SELECT ALL THAT APPLY** | |

| | |
|---|---|
| South African | 1 |
| Non-South African | 2 |
| Not Applicable | 3 |

Unfortunately, it was not possible to obtain a copy of the exact answers that respondents gave to these questions. As such, the results provided below are those reflected in the National Mapping Study report.

The table below, which has been copied directly out of the National Mapping Study report, reflects the results of respondents' answers to the questions reflected above. In considering the data presented in this table, it is important to note that, in many instances, because respondents were allowed to select more than one option in response to the questions posed, the percentages for race group, gender, age, and nationality add up to more than 100% within provinces. As such, these figures should be regarded as indicative rather than definitive reflections of CCI business ownership.

***Table 2.1: Indicative Ownership of CCI Businesses (percentages)***

| | | | Province | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | % | Overall | Eastern Cape | Free State | Gauteng | Kwa-Zulu Natal | Limpopo | Mpumalanga | Northern Cape | North West | Western Cape |
| | n= | **2451** | **155** | **112** | **738** | **530** | **219** | **206** | **51** | **54** | **386** |
| Race | Black | 52.1 | 40.6 | 66.1 | 44.9 | 64.7 | 83.6 | 70.9 | 66.7 | 75.9 | 16.3 |
| | White | 38.8 | 56.8 | 33.0 | 49.9 | 19.8 | 8.7 | 25.7 | 21.6 | 22.2 | 66.8 |
| | Indian/Asian | 5.7 | 5.2 | 1.8 | 4.6 | 13.8 | - | 1.9 | 2.0 | 1.9 | 4.4 |
| | Coloured | 5.2 | 11.0 | 2.7 | 3.3 | 2.5 | 1.4 | 0.5 | 25.5 | 7.4 | 12.7 |
| | Other | 0.8 | 1.9 | 0.9 | 0.5 | 0.4 | 0.5 | 0.5 | - | 1.9 | 1.8 |
| | Don't know | 6.5 | 8.4 | 6.3 | 5.6 | 5.3 | 5.9 | 3.9 | 5.9 | 3.7 | 11.7 |
| Gender | Male | 59.9 | 54.2 | 52.7 | 69.4 | 49.6 | 57.1 | 60.2 | 58.8 | 66.7 | 60.6 |
| | Female | 48.6 | 60.0 | 52.7 | 42.7 | 56.6 | 48.9 | 45.1 | 47.1 | 50.0 | 44.6 |
| | Don't know | 5.8 | 6.5 | 6.3 | 4.3 | 6.2 | 5.9 | 4.4 | 3.9 | 7.4 | 8.3 |
| Age | <18 years | 0.8 | 0.6 | - | 0.8 | 0.6 | 0.9 | 1.0 | 2.0 | 3.7 | 0.5 |
| | 18-24 years | 8.0 | 5.2 | 4.5 | 7.0 | 8.3 | 12.3 | 8.7 | 31.4 | 22.2 | 3.6 |
| | 25-34 years | 25.1 | 18.1 | 23.2 | 28.5 | 26.4 | 32.4 | 24.8 | 39.2 | 33.3 | 13.0 |
| | 35-44 years | 31.9 | 32.9 | 35.7 | 31.0 | 29.1 | 34.2 | 35.4 | 25.5 | 35.2 | 32.9 |
| | 45-54 years | 26.5 | 36.1 | 27.7 | 23.4 | 27.4 | 26.0 | 28.6 | 13.7 | 24.1 | 28.0 |
| | 55 years and older | 26.2 | 34.2 | 22.3 | 28.5 | 22.3 | 21.9 | 23.8 | 15.7 | 22.2 | 30.6 |
| | Don't know | 6.2 | 7.1 | 7.1 | 4.2 | 7.0 | 7.3 | 5.3 | 2.0 | 7.4 | 8.3 |
| Nationality | South African | 92.4 | 96.1 | 95.5 | 94.4 | 94.9 | 83.1 | 90.8 | 98.0 | 96.3 | 87.3 |
| | Non-South African | 6.0 | 3.9 | 2.7 | 5.4 | 4.2 | 11.0 | 5.3 | 5.9 | 1.9 | 9.8 |
| | Don't know | 3.0 | 2.6 | 2.7 | 2.2 | 2.5 | 5.9 | 3.9 | - | 1.9 | 4.1 |

Viewed in the context of transformation, the ownership results presented in the table above indicate that, in 2013:

- With the exception of the Western and Eastern Cape provinces, the majority of CCI businesses were owned by Blacks, Indians/Asians, and Coloureds;
- The majority of CCI businesses are owned by males; and
- People under the age of 35 owned just over one third of CCI businesses.

With regards to ownership, the authors of this study concludes the following:

> *Nationally, more than half of entity owners are black (52.1%); black ownership tends to be higher in Limpopo (83.6%) and Mpumalanga (70.9%) compared to other provinces. The Western Cape, Eastern Cape and Gauteng are the only provinces where white ownership is higher than black ownership. Nationally, the majority of entities are male-owned (59.9%). Female ownership is higher in the Eastern Cape and KZN*.

### *2.3.2 "The Transformation and Job Creation in the Cultural and Creative Industries in South Africa" study (2016)*

This study used the database of CCI firms that was created as part of the National Mapping Study described above.[8] The authors of this study appear to have had direct access to respondents' answers as they were able to provide ownership (and employment) statistics by cultural domain, which were used to construct a transformation score where firms that:

- Had at least one Black, Indian/Asian, or Coloured owner were given a score of 2, otherwise 0 - Black ownership was 'double-weighted to reflect the importance of this variable in the South African context';
- Firms that had at least one female owner were given a score of 1, otherwise 0; and
- 'the fraction of the firm workforce that was made up of Black, Indian/Asian, and Coloured people'.

The table below presents the results of this exercise.

| Variable/Domain | Cultural and Natural Heritage | Performance and Celebration | Visual Arts and Crafts | Books and Press | Audio-Visual and Interactive Media | Design and Creative Services |
|---|---|---|---|---|---|---|
| **Number (and %) of CCI Firms** | 227 (9.3%) | 620 (25.3%) | 607 (24.8%) | 259 (10.6%) | 156 (6.4%) | 582 (23.7%) |
| **Average Transformation Score (out of 4)** | 2.15 | 2.51 | 2.55 | 1.95 | 1.96 | 2.05 |

In considering the results presented in the table above, the authors of this study indicate that:

- Average transformation scores varied quite significantly, but were all below 3 (out of a possible 4), demonstrating that historical patterns of ownership and employment are still replicated in the CCIs in South Africa;
- The domains with the highest transformation scores were Visual Arts and Crafts (2.55) and Performance and Celebration (2.51);

8 Snowball, J, Collins, A, and Tarentaal, D. September 2016. Transformation and Job Creation in the Cultural and Creative Industries in South Africa.

- In terms of ownership, CCI firms in South Africa showed quite a lot of variation across the different domains. Firms who had at least one black (meaning black African, coloured, or Indian/Asian person) varied from 65% for Performance and Celebration to 44% for Books and Press;
- Firms with at least one female owner varied from 31% (Audio-Visual and Interactive Media) to 58% (Visual Arts and Crafts);
- Youth (up to 34 years old) ownership was most prevalent in Performance and Celebration (45%) and least likely in Books and Press;
- More commercial sectors such as Books and Press, Audio-Visual and Interactive Media, and Design and Creative Services are less likely to have at least one black owner and at least one female owner; and
- Less commercial sectors, especially Performance and Celebration and Visual Arts and Crafts tend to be more diverse in terms of ownership.

In their concluding remarks, the authors of this study state the following:

> [F]*rom the sample of 2400 CCI is interviewed in South Africa, it is possible to say that they are making (a) significant contribution to ownership and employee transformation. However, the ownership and employment profile of firms in most UNESCO Domains are still not representative of the Labour force make-up of the country. In some domains, especially Audio-Visual and Interactive Media, this is likely to be because of the project-based nature of the work which, as found in other countries, tends to be based on short-term contracts, making networks extremely important for success in the sector. In South Africa, it is also a function of apartheid-era policies and on-going income and education inequalities*.

### *2.3.3 Ownership of businesses listed on the Johannesburg Stock Exchange (JSE)*

In September 2010, the Johannesburg Stock Exchange (JSE) released its first findings on the ownership composition of companies listed on the JSE[9]. According to the independent study commissioned by the JSE that undertook the analysis of ownership, "black South African investors currently own 18% of the available share capital in the top 100 companies listed on the exchange". The available capital was calculated according to requirements, as set out by the Department of Trade and Industry (DTI).

As per the DTI Code, JSE-listed shares owned by foreign investors was included in the study. If foreign ownership is excluded, the JSE estimated that 30% percent of available share capital was held by black shareholders. In this regard, an article that appeared on the *Business Tech* website in 2013 indicated the following regarding ownership and management of listed businesses:

- As at the end of 2013, black South Africans held at least 23% of the top-100 companies listed on the JSE, 10% of which were held directly (largely through BEE schemes), and

[9] JSE Presents Findings on Black Ownership on the JSE. September 02, 2010. www.jse.co.za

13% through mandated investment (mostly individuals contributing to pension funds, unit trusts, and life policies);
- White South Africans held approximately 22% of the top-100 companies, whilst foreign investors held about 39%, up from 34% in 2011.[10]

A follow-up article that appeared on the *Business Tech* website in 2015 noted that:

- Data from the 2015 Jack Hammer Executive Report showed that the number of Black CEOs running the top-40 JSE listed companies had declined from 15% in 2014 to only 10% in 2015;
- Out of a total of 334 people constituting the executive teams in SA's top-40 companies, 21% were black South Africans; and
- 537 directors on South Africa's top-40 listed company boards, 72% were white.[11]

A review was undertaken of the latest available annual reports of JSE-listed companies that align with the cultural domains and CCI activities included in the 2009 UNESCO Framework for Cultural Statistics (FCS). These companies included:

- African Media Entertainment Ltd (JSE media sector; FCS Books and Press domain);
- Caxton CTP Publishers and Printers Ltd (JSE media sector; FCS Books and Press domain)
- Naspers Limited (JSE media sector; FCS Books and Press domain);
- MTN Group Ltd (JSE mobile telecommunications sector; FCS Audio-Visual and Interactive Media domain); and
- Vodacom Group Ltd (JSE mobile telecommunications sector; FCS Audio-Visual and Interactive Media domain).

In reviewing these annual reports for statements regarding transformation, ownership, and employment equity, the following was deemed relevant to this study:

- *African Media Entertainment Ltd*: During 2015, the company sold the majority of its investment in Radio Heads Investment Holdings (Pty) Ltd to a B-BBEE partner. The company and group is still consolidated as the company controls the board and administration functions until such a time as the loan has been repaid in full. There was no indication of share ownership by race;

- *Caxton CTP Publishers and Printers Ltd*: Caxton and CTP Publishers and Printers Limited's subsidiaries and jointly controlled entities are subject to individual BEE audits each year. The CTP Limited BEE audit, based on the DTI Amended Codes that took effect on 1 May 2015, resulted in a Level 4 BEE rating, equating to 100% BEE procurement recognition.

10 Black Vs White Ownership on the JSE. September 2013. https:// businesstech.co.za
11 The truth about black and white ownership on the JSE. 29 October 2015. https:// businesstech.co.za

These Amended Codes have been used to refine the Group's transformation strategy for the next few years. CTP Limited's Black Ownership is measured using the flow through principle from the JSE listed entity, Caxton and CTP Publishers and Printers Limited. Black Ownership was measured as 17.78% and Black Female Ownership as 6.28%;

- *Naspers Ltd*: Multi-Choice's employment equity is 87% black and 56% female. Media24 attained a level-4 status with a 100% procurement recognition on BEE under the revised BEE code. Shares in *Phuthuma Nathi* (PN) and *Phuthuma Nathi* 2 (PN2) (Multi-Choice's BEE equity schemes) were launched in 2006 and 2007 respectively and began trading on an over-the-counter (OTC) platform. *Welkom Yizani*, Media24's BBBEE scheme, launched in 2006, remains the biggest BEE share offer in the South African print media industry with around 90 000 shareholders. In 2013, the scheme began trading on an OTC platform. Media 24 partnered with CapaCiTi to train 17 black graduates in specific software stacks (or suites of programs), with internships offered to the top performing students;

- *MTN Group Ltd*: The group launched *MTN Zakhele Futhi Limited* in South Africa, a R9.9 billion empowerment scheme holding approximately 4% equity in the MTN Group. The company successfully extended its black economic empowerment scheme in South Africa with the *MTN Zakhele Futhi* share offer, which gave the black public and existing *MTN Zakhele* shareholders an opportunity to invest (at a meaningful discount) in MTN. In 2015, the company improved its B-BBEE contributor status by upgrading from level 2 to level 3; and

- *Vodacom Group Ltd*: Black representation in the company's workforce is 73%, with 55% at senior management level and 58% in the Executive Committee. Women represent 47% of the workforce, with 30% at senior management level. In July 2008, *YeboYethu* acquired 3.44% of Vodacom South Africa in a R7.5 billion B-BBEE transaction. All permanent South African employees were able to participate in the trust. Of the 1.875 billion units available to the trust, 75% was allocated to employees in 2008. The remaining 25% was set aside for future employees on a sliding scale over the following five-years from the date of inception. The allocation was weighted 70/30 in favour of Black employees. The trust's seven-year maturity period ended in August 2015. The initial seven-year maturity period was extended in March 2016, after taking notional vendor financing into account and which will be converted into *YeboYethu* shares in March 2019. Following this date, Vodacom aims to facilitate the sale of these shares to qualifying members of the South African public through the online *YeboYethu Limited* trading platform, which was launched for Black South Africans in February 2014. In procuring goods and services, R24 billion weighted was spent on BEE-status suppliers, and R5.7 billion to black woman-owned suppliers in South Africa. Vodacom recently recruited 70 graduates in South Africa and 58 students across its international operations; 55% of the South African recruits were female, and 69% were black Africans (the highest proportion since the programme's inception). The company established the Innovator Trust in 2014, with a loan facility of R750 million over five-years at a lower than prime interest rate. The funding is used to equip black entrepreneurs in the ICT sectors with the necessary business skills to work with the corporate sector. As at 31 March 2017, the Innovator Trust has successfully incubated 53 small-medium enterprises (SMEs) as part of a two-year business training programme.

From the above, it appears that large listed CCI businesses in South Africa have all made significant achievements in terms of employment equity. Black ownership, as is discussed below, is still relatively limited within the CCI sector

## 2.4 Black entrepreneurship as a key driver of transformation in the CCIs

The following article appeared on the Blackwolf Agency website on 18 April, 2017:

*Transformation in South African business is a prominent topic of discussion amongst today's industry leaders. It is undeniable – since 1994, progress has been slower than expected. According to Lebogang Tsele from SME South Africa, black business ownership in the tourism sector – one of the most transformed sectors in the South African economy, is at 20%, with management control at 50%. In the creative industry, which includes marketing and advertising however, the figures are significantly lower. According to Loeries' judge and FCB Johannesburg creative director Suhana Gordhan, "transformation in this industry is slow and it needs to happen in a bigger way for women of colour and for people of colour in the industry." Not only is the creative industry predominantly white owned and managed, but also male dominated. A number of transformation initiatives are focused on bringing about positive change in this arena.*[12]

### 2.4.1 The need to develop black entrepreneurs

This Black Wolf Agency went on to say:

*An incubator project launched in January 2016 by The Creative Counsel is set to boost black ownership in the brand communication industry. The project has opened applications for black start-ups in media, marketing, digital, mobile and activations. These start-ups will be incubated until they are fully functional. Creative Counsel CEO's Ran Neu-Ner and Gil Oved delivered this poignant statement to SME South Africa's Refilwe Kgosiemang: "We believe successful black-owned businesses are the true measure of transformation. For as long as the advertising industry continues to find sophisticated methods of fronting and recycling the few black managers in the industry, economic transformation will not be achieved. At TCC, we hope to confront and hopefully, eradicate this practice and foster true empowerment in the industry.*

*Alongside the launch of this incubator project is the launch of a new Transformation Council by the IAB SA, "with the sole aim of bringing about sustainable change and*

12 Blackwolf Agency, Industry News. 18 April, 2017. Black Entrepreneurship as a Key Driver of Transformation In SA's Creative Industry

*education in the digital publisher, media and marketing industry." These initiatives are a key driver of change, but true transformation at the most basic level will require nothing less than a paradigm shift in the minds of both industry leaders and aspiring creative entrepreneurs.*

*The drive towards meeting transformation targets needs to transcend the 'tick-boxing approach' of employing black business people in leadership positions within white-owned creative companies. Too often, black integration into the industry has become a means by which to obtain higher BEE codes, but the exclusionary attitude has remained the same. The pace and shape of the industry is still being determined by members of the white middle class. Such has been the status quo of the South African market since its inception. The tick-box approach does not lead to the longevity and sustainability that the creative industry needs in order to transform. What needs to be encouraged and developed is black entrepreneurship.*[13]

### 2.4.2 Successful entrepreneurship to be nurtured at school level

The final paragraph of the Black Wolf Agency article indicated that:

[Former] *Deputy President Cyril Ramaphosa recently called for entrepreneurship to be included in the curriculums of South African schools. Ramaphosa pointed to success stories such has Johannesburg Mayor, Herman Mashaba as an archetype of prosperous, local black entrepreneurship. "There is much more we can do, entrepreneurship must be part of the school curriculum … So that young people must from an early age be encouraged to be problem solvers," said Ramaphosa to City Press. If implemented, this solution could be a big part of what is needed to encourage not only growth in black business but also young entrepreneurship. Fundamental change requires a new, thriving generation of black youth who are passionate about building businesses from the ground-up and contributing positively towards the South African economy. This is particularly true of the local creative industry that is ripe for disruption of the social kind. The benefits of black entrepreneurship in this sector are multifarious*.[14]

## 2.5 Transformation, job creation and subsidies to the CCIs

Collins and Snowball published an article that analysed 'The effectiveness of incentives provided to the film and television sector in South Africa…in terms of their stated objectives of job creation, skills and knowledge transfer and the attraction of foreign direct investment'.[15] In the introduction to this research report, the authors note that:

13 *Ibid*.
14 *Ibid*.
15 Collins, A, Snowball, J. Undated. Transformation, Job Creation and Subsidies to Creative Industries: the Case of South Africa's Film and Television Sector.

*The film and television sector can and does provide jobs and skill development in South Africa, building on a cluster of creative industries in the private and public sector centred on the city of Cape Town (Barnard and Tuomi 2008), which on a range of criteria (see Evans 2009) would seem to warrant the appellation of South Africa's main creative city. In addition, a report commissioned by the Department of Labour on the creative industries (Creative Industries Report, 2008) found that the economic activity generated by the film and television industry in the Western Cape was R2.5b in 2003/4 as compared to only R1.3b generated by the sector in Gauteng.*

This study reports on an analysis of project-level data held by the DTI to examine the effectiveness of the current incentive scheme in terms of the broader aim of transformation in South Africa. In this regard, it explicitly stated objectives of creating jobs, developing skills and the technological knowledge base, and also attracting foreign exchange. In their concluding remarks, the authors state that:

*This study has demonstrated that the South African film incentive programs have been successful in stimulating the South African film industry in a number of spheres, particularly helping to attract large-budget foreign films and co-productions. For companies specializing in this area, the incentives are working well. The economic impact of subsidized films on the South African economy between 2009 and 2011 was, on average, R2.2 billion per year, with the employment of about 15,500 people in full time equivalent (direct and indirect) jobs per year.*

*Skills development is occurring through knowledge spill-overs from foreign and co-productions, as well as various internship and training programs. However, transformation in the industry has been slow. This is partly due to the short-term contract nature of the industry, which makes it a risky career option for emerging black film-makers, and partly due to the disincentive for private firms to invest in highly mobile human capital'.*

*Challenges experienced by film and television producers in South Africa can be divided into general issues, experienced by all producers, and those specific to smaller-budget South African productions. General problems can be summarized as follows:*

- *Lack of business acumen amongst producers, especially smaller companies;*
- *Competition from other countries regarding incentives and subsidies;*
- *A sometimes volatile exchange rate;*
- *Lack of local demand for South African films; and*
- *Lack of vertical integration (too narrow a focus on production).*

*In addition, smaller producers and those engaged in longer term projects experience difficulty in securing financing, related to the R2.5 million minimum spending required in order to qualify for the subsidy; rent-seeking behaviour by agents employed to help firms navigate the complexities of subsidy application and auditing requirements; and difficulties in reinvesting in the firm, since a requirement of the subsidy is that the special purpose vehicle (SPV) set up for each project cannot own any capital equipment.*[16]

The following section deals with the topic of employment in the CCIs.

## 3. Employment in South Africa's CCIs

This section focuses on employment in South African CCI businesses. A review is made of research reports that have been provided by the DAC that focus on this topic. This is then followed with a presentation of the results of work undertaken in this study to determine the number of people employed in the CCIs.

### *3.1 Literature review*

The DAC provided copies of research reports for the following studies:

- DAC National Mapping Study;[17]
- Measuring Cultural Employment in South Africa: A Comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Code;[18] and
- Employment in the Cultural and Creative Industries in South Africa.[19]

#### *3.1.1 DAC "National Mapping Study" (2014)*

The DAC National Mapping Study included questions regarding employment. In presenting their employment results, the authors of the study state that, *"Given the likelihood of an undercounted universe, labour absorption estimates have been calculated using optimistic to moderate undercount calculations. These allow us to account for the possibility of an undercounted universe, and provide a more realistic range of employment figures and sector labour absorption percentages*". The table below, which has been copied from this report, presents a low-, mid- and upper-range of employment in the cultural domains.

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16 *Ibid*.

17 Plus 94 Research. September 2014. DAC National Mapping Study.

18 Snowball, J, and Hadisi, S. September 2016. Measuring Cultural Employment in South Africa: A Comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Code.

19 Snowball, J, and Hadisi, S. September 2017. Employment in the Cultural and Creative Industries in South Africa.

| | | Lower Range Estimate (10%) | | Mid Range Estimate (20%) | | Upper Range Estimate (30%) | |
|---|---|---|---|---|---|---|---|
| **Domain** | **Mean Employees** | **Universe Size** | **Labour Absorption** | **Universe Size** | **Labour Absorption** | **Universe Size** | **Labour Absorption** |
| Cultural & Natural Heritage | 9 | 2,154 | 18,725 | 2,350 | 20,427 | 2,545 | 22,130 |
| Performance & Celebration | 7 | 4,122 | 29,797 | 4,496 | 32,506 | 4,871 | 35,214 |
| Visual Arts & Crafts | 4 | 3,801 | 16,870 | 4,146 | 18,404 | 4,492 | 19,938 |
| Information, Books & Press | 6 | 2,285 | 14,306 | 2,492 | 15,606 | 2,700 | 16,907 |
| Audio-Visual & Interactive Media | 7 | 1,366 | 9,970 | 1,490 | 10,876 | 1,615 | 11,782 |
| Design & Creative Services | 6 | 11,651 | 73,141 | 12,710 | 79,790 | 13,770 | 86,439 |
| **Total** | | 25,378 | 162,809 | 27,685 | 177,610 | 29,992 | 192,410 |
| Number of individuals employed in South Africa *(Stats SA, Q1, 2014)* | | 15,055,000 | | | | | |
| Percent of total employment in country | | 1.08% | | 1.18% | | 1.28% | |

The authors concluded that, "*After accounting for the possibility of an undercounted universe, it is realistic to estimate that the creative industries sector in South Africa employs between 162,809 and 192,410 individuals; and accounts for between 1.08% to 1.28% of employment in the country*".[20]

### *3.1.2 "Measuring Cultural Employment in South Africa" (2016)*

The aim of the 2016 DAC research report on measuring cultural employment was to determine to what extent the classification systems for occupations and industry used in South Africa fits with the classification system used by UNESCO in their Survey of Cultural Employment Statistics Manual (2015). As stated in the Summary of this report:

> *The findings of this research show that the South African Labour Force Survey provides a potentially useful source of data on employment in the cultural industries, although the classification system used by South Africa is somewhat different from that used by UNESCO. It is judged that internationally comparable data for cultural employment in South Africa could be produced. However, matching cultural employment to cultural and non-cultural industries is likely to be a much more challenging task.*

The key findings made in this research report that have a bearing on the current study include:

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20 *Ibid*.

- The classification system currently in use by Stats SA is the old SASCO-2001 (second edition) system, using 4-digit codes, which is quite considerably different from the ISCO-08 system used by UNESCO;
- Another problem identified in this research report is that, in some cases, the current South African classification system does not provide enough detail '*to determine the sheer of a particular category that should be allocated to the cultural sector';* and
- The old version of the industrial classification used in South Africa, SA-SIC-1993, 5th edition, does not match well with the ISIC (Rev. 4) system used by UNESCO.

The authors of this study conclude that:

> *As far as matching cultural employment to industries, the finding of this research shows that this is likely to be a much more challenging task, given the system currently in use in South Africa (which can be matched to the system used for the LFS). [T]here are some industry classifications that are significantly different from the international system on which the UNESCO Guidelines are based*.

### 3.1.3 *"Employment in the cultural and creative Industries in South Africa" (2017)*

This 2017 report "follows on from previous research using officially collected, national-level data" to determine "the size of employment in cultural occupations and industries in South Africa in 2015"*.* The authors of this study note that, "*most of the occupations classified as Cultural in the UNESCO system can be found in the South African Labour Force Survey (LFS) data collected quarterly by Stats SA albeit in different major groups"*. The sample size with those who were classed as employed was 76 064 (LMDSA annual data set, 2015). The tables and figures below present a selection of the key findings of this research study.

***Table 3.1: Cultural Occupations as a Percentage of All Occupations (numbers)***

| Occupation category | Observation | Percentage[21] |
|---|---|---|
| **Cultural occupations** | 1 894 | 2.5% |
| **Non – cultural occupations** | 74 170 | 97.5% |
| **Total** | **76 064** | **100%** |

21 Note that the observations were weighted by the coefficients provided by Statistics SA for this dataset to obtain percentages.

*Figure 3.1: Cultural occupations by domain (percentage)*

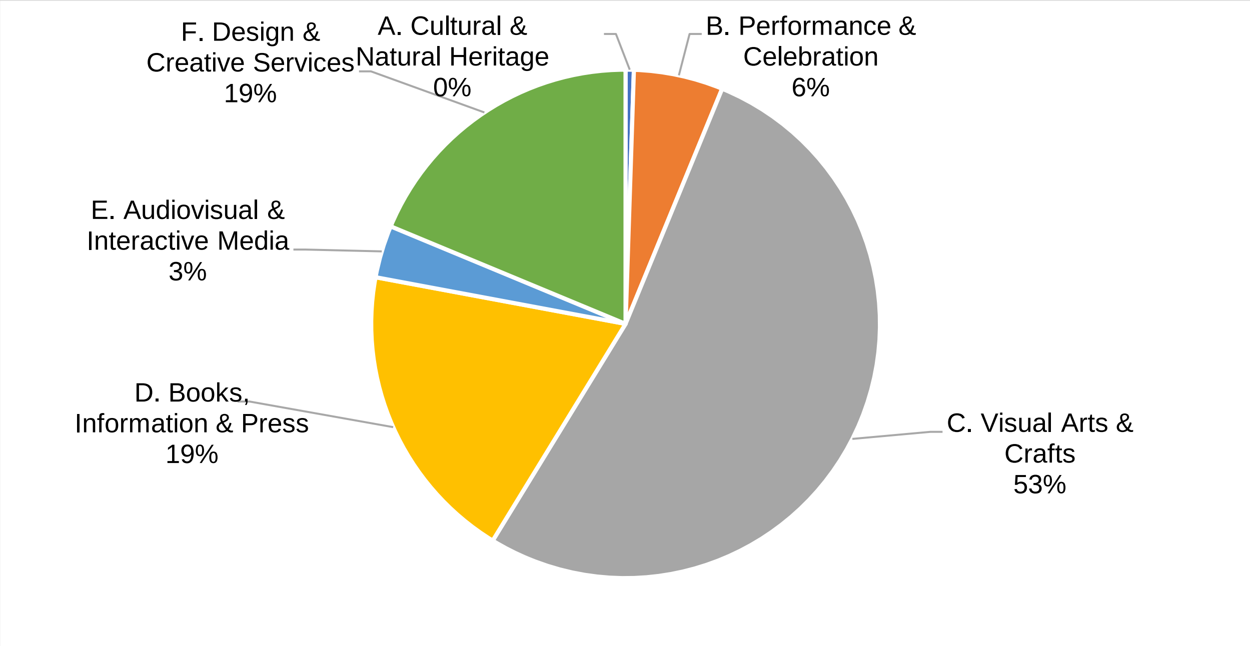



*Figure 3.2: Cultural and non-cultural occupations by race group (percentage)*

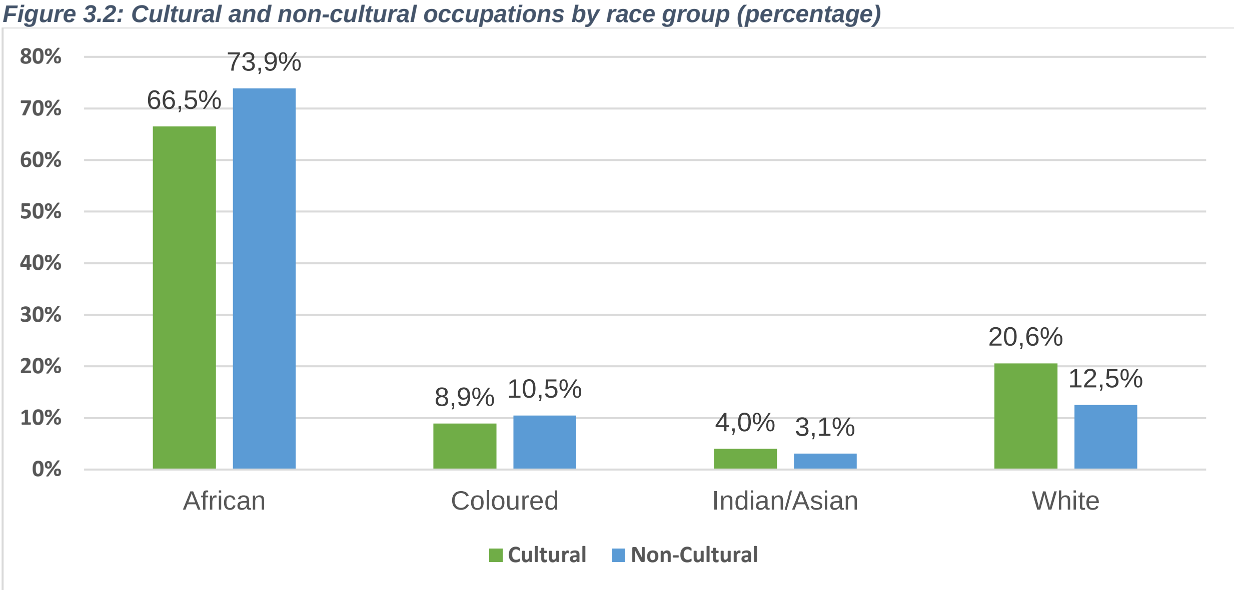
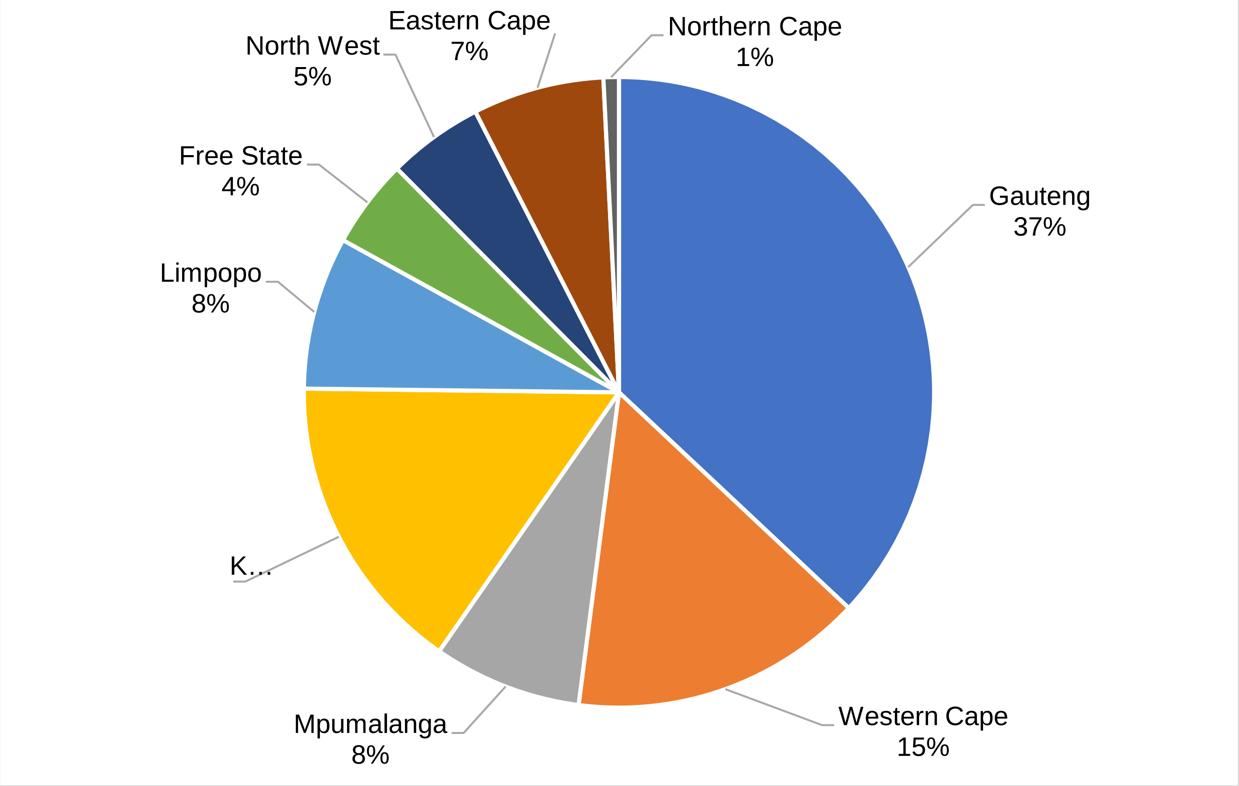


*Figure 3.3: Cultural Occupations by Province (percentage, 2015)*




### *3.2 Current study employment statistics*

This section presents the results of the analysis of CCI employment undertaken in this study. Employment numbers are presented on a national and provincial basis, with statistics being presented for employment by racial grouping within domain. In addition, employment statistics by racial grouping are presented for 2010 and 2015, which reflects changes in employment patterns over these two periods.

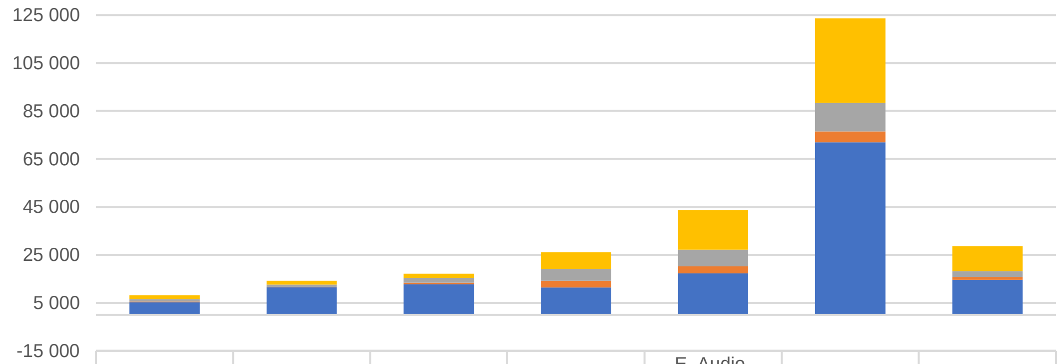
#### *3.2.1 Methodology*

Labour force numbers have been determined for each CCI activity using labour/production ratios. These ratios were calculated based on SIC sector labour force data derived from the Quarterly Labour Force Survey and production figures derived from the AFS report, after the SIC data from these two sources had been brought into alignment with the CCI activities using the same approach for this alignment, as that used to align SIC sectors and CCI activities described above. The labour force numbers determined for the CCI activities were verified with the numbers reflected in the SACO cultural employment in South Africa report.

### 3.2.2 National CCI Employment

In 2016, a total of 261 837 people were employed in the CCI sector nationally. This represents 1.7% of the total South African employed labour force in 2016. Of this number, 47.3% were employed in the Design and Creative Services domain, 16.7% in the Audio-Visual and Interactive Media domain, 10.9% in the Education domain, and 10.0% in the Books and Press domain (which are, effectively, the 'creative/more commercial' domains). The remaining 15.2% of CCI employees are employed in the Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts domains.

*Figure 3.4: National Employment by Racial Group (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 8 271 | 14 233 | 17 200 | 26 054 | 43 746 | 123 725 | 28 607 |
| Whites | 1 734 | 1 589 | 1 787 | 6 825 | 16 540 | 35 256 | 10 381 |
| Coloureds | 989 | 915 | 1 991 | 5 023 | 6 910 | 12 010 | 2 359 |
| Asians | 329 | 233 | 674 | 2 809 | 2 959 | 4 492 | 1 224 |
| Africans | 5 219 | 11 496 | 12 749 | 11 397 | 17 336 | 71 967 | 14 643 |

Africans represented the most significant employment group, accounting for 55.3% of total National CCI employment in 2016, followed by Whites (28.3%), Coloureds (11.5%), and Asians/Indians (4.9%). Africans were the largest group employed in all of the cultural domains nationally. The table below provides a percentage breakdown of employment by racial grouping within each cultural domain.

*Table 3.2: National Employment by Race within Domain (2016, percentages)*

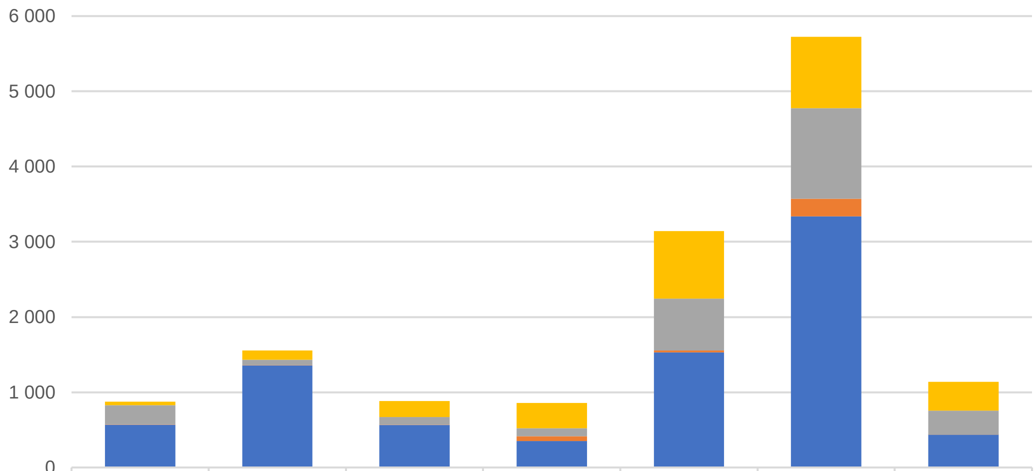
| | **Africans** | **Asians** | **Coloureds** | **Whites** | **Total CCI Employment** |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 63.1% | 4.0% | 12.0% | 21.0% | **100.0%** |
| **B. Performance and Celebration** | 80.8% | 1.6% | 6.4% | 11.2% | **100.0%** |
| **C. Visual Arts and Crafts** | 74.1% | 3.9% | 11.6% | 10.4% | **100.0%** |
| **D. Books and Press** | 43.7% | 10.8% | 19.3% | 26.2% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 39.6% | 6.8% | 15.8% | 37.8% | **100.0%** |
| **F. Design and Creative Services** | 58.2% | 3.6% | 9.7% | 28.5% | **100.0%** |
| **Education** | 51.2% | 4.3% | 8.2% | 36.3% | **100.0%** |
| **Total** | **55.3%** | **4.9%** | **11.5%** | **28.3%** | **100.0%** |

The total employment figure of 261 837 calculated in this study is somewhat higher than the upper range estimate of 192 410 total employment presented in the 2014 National Mapping study. In comparing these total employment figures, it must be borne in mind that the current study figures are for 2016 and include an estimate of informal CCI absorption. What follows are statistics for CCI employment within each of the nine provinces.

### 3.2.3 CCI Employment in the Eastern Cape CCI Employment

In 2016, a total of 14 182 people were employed in the CCI sector in the Eastern Cape. Of this number, 40.4% were employed in the Design and Creative Services domain, 22.1% in the Audio-Visual and Interactive Media domain, 11% in the Performance and Celebration domain, 8.0% in the Education Domain, and 6.0% in the Books and Press domain. The remaining 12.4% of CCI employees are employed in the Cultural and Natural Heritage and Visual Arts and Crafts domains.

***Figure 3.5: Employment by Race within Domain (2016, numbers)***




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 875 | 1 557 | 885 | 858 | 3 141 | 5 726 | 1 140 |
| Whites | 48 | 125 | 215 | 336 | 898 | 950 | 383 |
| Coloureds | 254 | 74 | 102 | 105 | 686 | 1 205 | 320 |
| Asians | 6 | 1 | 4 | 66 | 28 | 233 | 0 |
| Africans | 567 | 1 358 | 565 | 350 | 1 529 | 3 338 | 437 |

Africans represented the most significant employment group, accounting for 57.4% of total CCI employment in the Eastern Cape in 2016, followed by Whites (20.8%), Coloureds (19.4%), and Asians/Indians (2.4%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

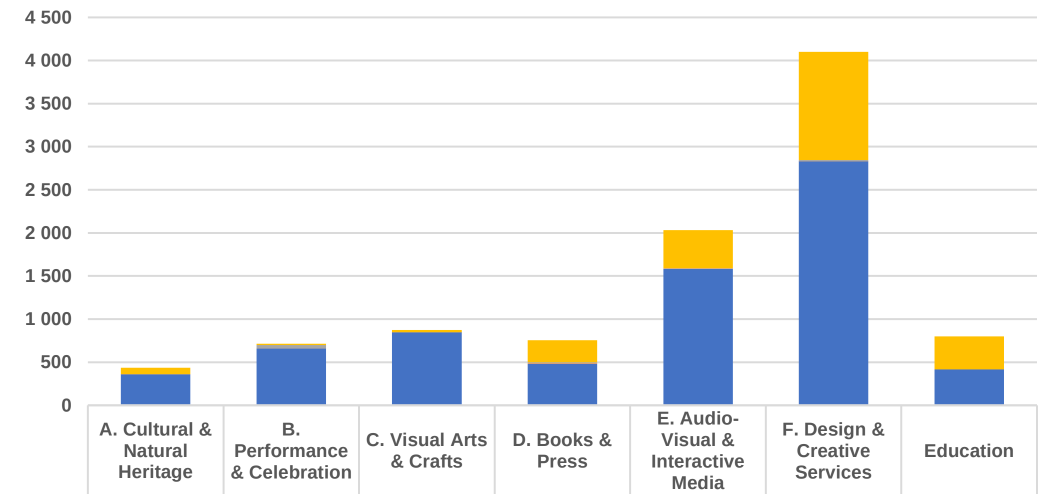
*Table 3.3: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 64.8% | 0.6% | 29.0% | 5.5% | **100.0%** |
| **B. Performance and Celebration** | 87.2% | 0.1% | 4.7% | 8.0% | **100.0%** |
| **C. Visual Arts and Crafts** | 63.8% | 0.4% | 11.5% | 24.2% | **100.0%** |
| **D. Books and Press** | 40.8% | 7.7% | 12.3% | 39.2% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 48.7% | 0.9% | 21.9% | 28.6% | **100.0%** |
| **F. Design and Creative Services** | 58.3% | 4.1% | 21.1% | 16.6% | **100.0%** |
| **Education** | 38.3% | 0.0% | 28.0% | 33.6% | **100.0%** |
| **Total** | **57.4%** | **2.4%** | **19.4%** | **20.8%** | **100.0%** |

### 3.2.4 CCI Employment in the Free State

In 2016, a total of 9 710 people were employed in the CCI sector in the Free State. Of this number, 42.2% were employed in the Design and Creative Services domain, 20.9% in the Audio-Visual and Interactive Media domain, 8.2% in the Education Domain, and 7.8% in the Books and Press domain. The remaining 20.9% of CCI employees are employed in the Cultural and Natural Heritage, Performance and Celebration, and Visual Arts and Crafts domains.

*Figure 3.6: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 437 | 714 | 873 | 754 | 2 033 | 4 101 | 798 |
| Whites | 74 | 17 | 24 | 256 | 444 | 1 255 | 382 |
| Coloureds | 4 | 38 | 1 | 9 | 4 | 15 | 0 |
| Asians | 0 | 1 | 1 | 9 | 4 | 1 | 0 |
| Africans | 359 | 659 | 847 | 481 | 1 581 | 2 830 | 416 |

Africans represented the most significant employment group, accounting for 73.9% of total CCI employment in the Free State in 2016, followed by Whites (25.2%), Coloureds (0.7%), and Asians/Indians (0.2%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

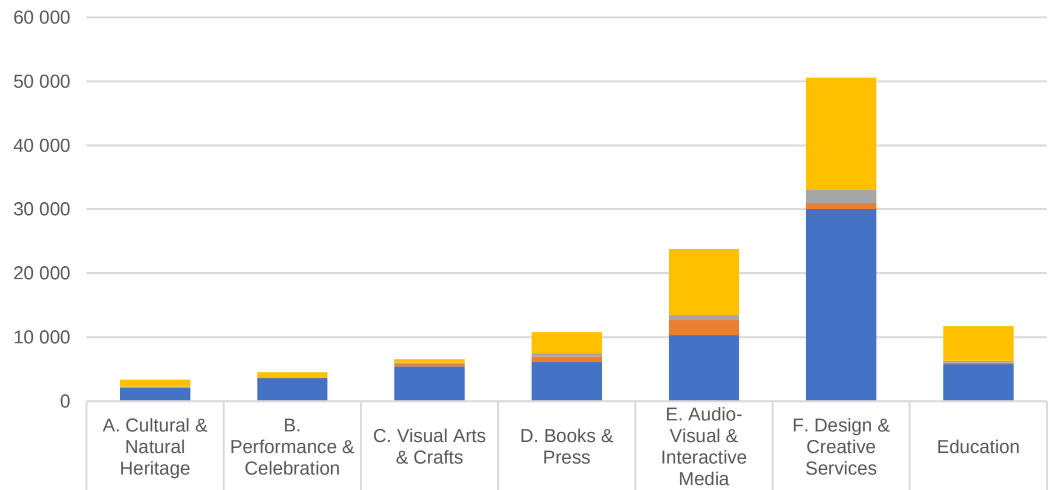
*Table 3.4: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 82.1% | 0.0% | 0.8% | 17.0% | **100.0%** |
| **B. Performance and Celebration** | 92.3% | 0.1% | 5.3% | 2.4% | **100.0%** |
| **C. Visual Arts and Crafts** | 97.1% | 0.1% | 0.1% | 2.7% | **100.0%** |
| **D. Books and Press** | 63.7% | 1.2% | 1.2% | 34.0% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 77.8% | 0.2% | 0.2% | 21.8% | **100.0%** |
| **F. Design and Creative Services** | 69.0% | 0.0% | 0.4% | 30.6% | **100.0%** |
| **Education** | 52.1% | 0.0% | 0.0% | 47.8% | **100.0%** |
| **Total** | **73.9%** | **0.2%** | **0.7%** | **25.2%** | **100.0%** |

### 3.2.5 CCI Employment in Gauteng

In 2016, a total of 111 507 people were employed in the CCI sector in Gauteng. Of this number, 45.4% were employed in the Design and Creative Services domain, 21.4% in the Audio-Visual and Interactive Media domain, 10.5% in the Education Domain, and 9.7% in the Books and Press domain. The remaining 13.0% of CCI employees are employed in the Cultural and Natural Heritage, Performance and Celebration, and Visual Arts and Crafts domains.

*Figure 3.7: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 3 398 | 4 528 | 6 607 | 10 780 | 23 831 | 50 628 | 11 734 |
| Whites | 1 125 | 790 | 557 | 3 300 | 10 367 | 17 582 | 5 414 |
| Coloureds | 25 | 66 | 273 | 485 | 745 | 2 057 | 272 |
| Asians | 111 | 96 | 323 | 841 | 2 380 | 954 | 280 |
| Africans | 2 137 | 3 575 | 5 454 | 6 154 | 10 339 | 30 035 | 5 768 |

Africans represented the most significant employment group, accounting for 56.9% of total CCI employment in Gauteng in 2016, followed by Whites (35.1%), Asians/Indians (4.5%), and Coloureds (3.5%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

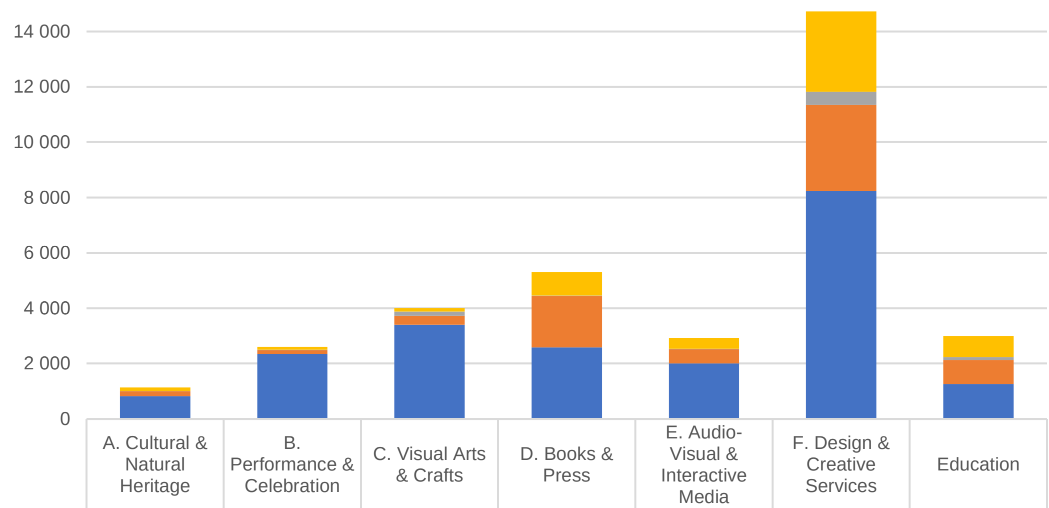
*Table 3.5: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 62.9% | 3.3% | 0.8% | 33.1% | **100.0%** |
| **B. Performance and Celebration** | 79.0% | 2.1% | 1.5% | 17.5% | **100.0%** |
| **C. Visual Arts and Crafts** | 82.5% | 4.9% | 4.1% | 8.4% | **100.0%** |
| **D. Books and Press** | 57.1% | 7.8% | 4.5% | 30.6% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 43.4% | 10.0% | 3.1% | 43.5% | **100.0%** |
| **F. Design and Creative Services** | 59.3% | 1.9% | 4.1% | 34.7% | **100.0%** |
| **Education** | 49.2% | 2.4% | 2.3% | 46.1% | **100.0%** |
| **Total** | **56.9%** | **4.5%** | **3.5%** | **35.1%** | **100.0%** |

### *3.2.6 CCI Employment in KwaZulu Natal*

In 2016, a total of 33 734 people were employed in the CCI sector in KwaZulu Natal. Of this number, 43.7% were employed in the Design and Creative Services domain, 15.7% in the Books and Press domain, 11.9% in the Visual Arts and Crafts domain, 8.9% in the Education domain, and 8.7% in the Audio-Visual and Interactive Media domain. The remaining 11.1% of CCI employees are employed in the Cultural and Natural Heritage, and Performance and Celebration domains.

*Figure 3.8: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 1 142 | 2 612 | 4 013 | 5 307 | 2 932 | 14 731 | 2 997 |
| Whites | 138 | 112 | 133 | 853 | 391 | 2 907 | 762 |
| Coloureds | 0 | 20 | 148 | 2 | 23 | 475 | 99 |
| Asians | 180 | 133 | 330 | 1 868 | 516 | 3 117 | 867 |
| Africans | 824 | 2 347 | 3 402 | 2 584 | 2 001 | 8 234 | 1 269 |

Africans represented the most significant employment group, accounting for 61.2% of total CCI employment in KwaZulu Natal in 2016, followed by Asians/Indians (20.8%), Whites (15.7%), Coloureds (2.3%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

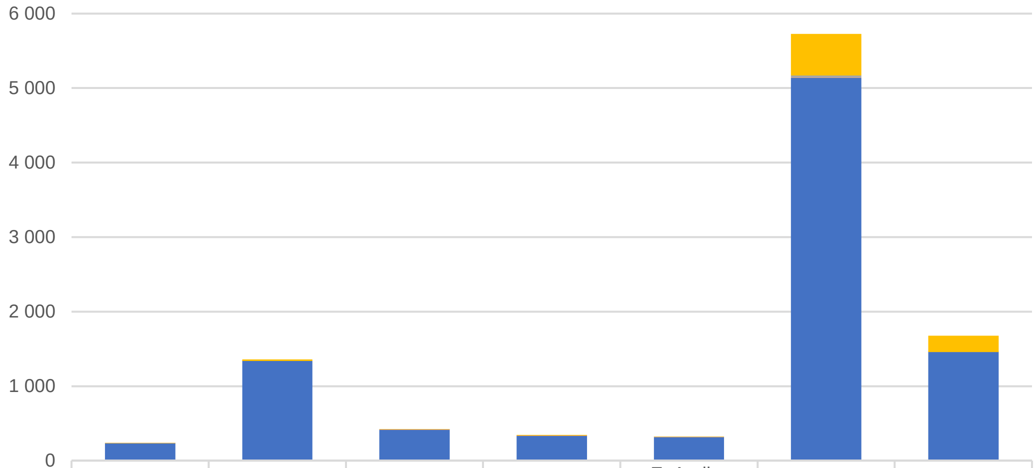
*Table 3.6: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 72.1% | 15.8% | 0.0% | 12.1% | **100.0%** |
| **B. Performance and Celebration** | 89.9% | 5.1% | 0.8% | 4.3% | **100.0%** |
| **C. Visual Arts and Crafts** | 84.8% | 8.2% | 3.7% | 3.3% | **100.0%** |
| **D. Books and Press** | 48.7% | 35.2% | 0.0% | 16.1% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 68.2% | 17.6% | 0.8% | 13.4% | **100.0%** |
| **F. Design and Creative Services** | 55.9% | 21.2% | 3.2% | 19.7% | **100.0%** |
| **Education** | 42.3% | 28.9% | 3.3% | 25.4% | **100.0%** |
| **Total** | **61.2%** | **20.8%** | **2.3%** | **15.7%** | **100.0%** |

### 3.2.7 CCI Employment in Limpopo

In 2016, a total of 10 087 people were employed in the CCI sector in Limpopo. Of this number, 56.8% were employed in the Design and Creative Services domain, 16.6% in the Education domain, 13.5% in the Performance and Celebration domain, 3.2% in the Audio-Visual and Interactive Media domain, and 3.4% in the Books and Press domain. The remaining 6.5% of CCI employees are employed in the Cultural and Natural Heritage, and Visual Arts and Crafts domains.

*Figure 3.9: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 238 | 1 360 | 418 | 345 | 323 | 5 727 | 1 675 |
| Whites | 3 | 21 | 1 | 8 | 3 | 559 | 219 |
| Coloureds | 0 | 0 | 1 | 3 | 3 | 26 | 0 |
| Asians | 0 | 0 | 1 | 5 | 4 | 1 | 0 |
| Africans | 235 | 1 338 | 416 | 330 | 314 | 5 141 | 1 456 |

Africans represented the most significant employment group, accounting for 91.5% of total CCI employment in Limpopo in 2016, followed by Whites (8.1%), Coloureds (0.3%), and Asians/Indians (0.1%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

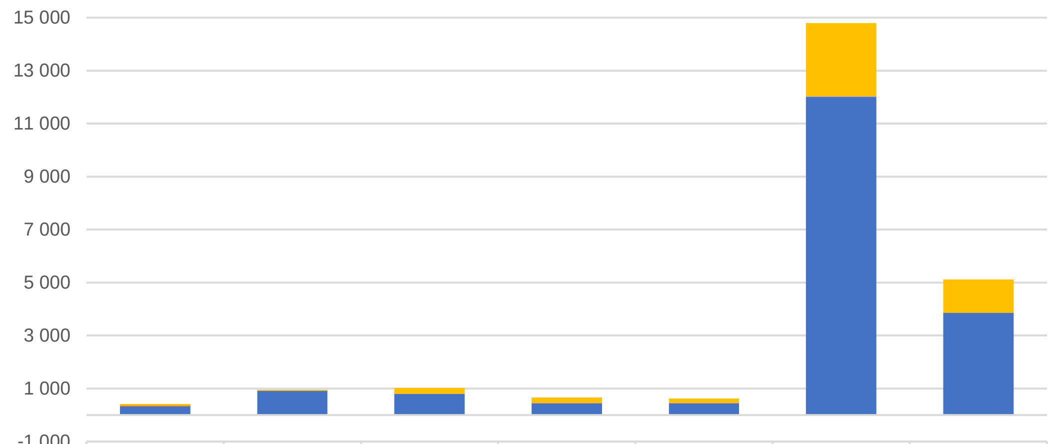
***Table 3.7: Employment by Race within Domain (2016, percentages)***

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 98.5% | 0.0% | 0.0% | 1.4% | **100.0%** |
| **B. Performance and Celebration** | 98.4% | 0.0% | 0.0% | 1.6% | **100.0%** |
| **C. Visual Arts and Crafts** | 99.3% | 0.2% | 0.2% | 0.2% | **100.0%** |
| **D. Books and Press** | 95.6% | 1.4% | 0.8% | 2.2% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 97.1% | 1.1% | 0.8% | 1.0% | **100.0%** |
| **F. Design and Creative Services** | 89.8% | 0.0% | 0.5% | 9.8% | **100.0%** |
| **Education** | 86.9% | 0.0% | 0.0% | 13.1% | **100.0%** |
| **Total** | **91.5%** | **0.1%** | **0.3%** | **8.1%** | **100.0%** |

### *3.2.8 CCI Employment in Mpumalanga*

In 2016, a total of 23 591 people were employed in the CCI sector in Mpumalanga. Of this number, 62.7% were employed in the Design and Creative Services domain, 21.7% in the Education domain, 4.3% in the Visual Arts and Crafts domain, 2.7% in the Audio-Visual and Interactive Media domain, and 2.8% in the Books and Press domain. The remaining 1.8% of CCI employees are employed in the Cultural and Natural Heritage domain.

***Figure 3.10: Employment by Race within Domain (2016, numbers)***




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 425 | 950 | 1 021 | 657 | 628 | 14 796 | 5 114 |
| Whites | 65 | 39 | 219 | 203 | 175 | 2 761 | 1 252 |
| Coloureds | 0 | 0 | 1 | 1 | 2 | 24 | 0 |
| Asians | 32 | 1 | 1 | 11 | 5 | 8 | 0 |
| Africans | 328 | 910 | 800 | 443 | 446 | 12 003 | 3 862 |

Africans represented the most significant employment group, accounting for 79.7% of total CCI employment in Mpumalanga in 2016, followed by Whites (20.0%), Asians/Indians (0.2%), and Coloureds (0.1%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

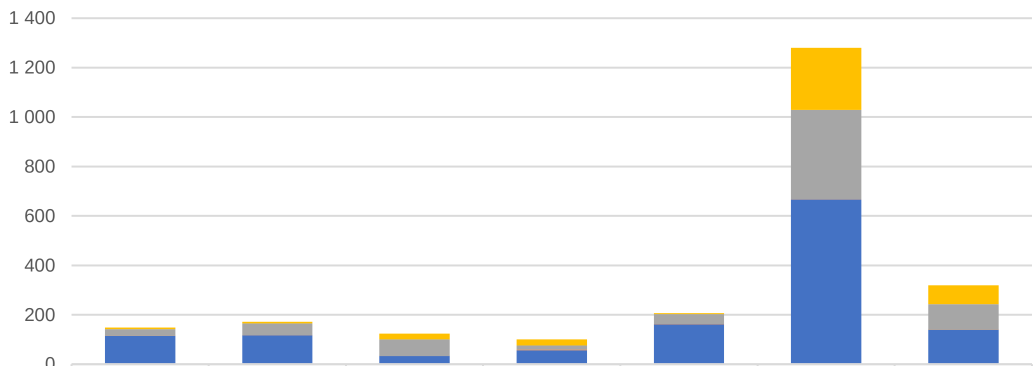
*Table 3.8: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 77.1% | 7.6% | 0.0% | 15.2% | **100.0%** |
| **B. Performance and Celebration** | 95.8% | 0.1% | 0.0% | 4.1% | **100.0%** |
| **C. Visual Arts and Crafts** | 78.4% | 0.1% | 0.1% | 21.5% | **100.0%** |
| **D. Books and Press** | 67.3% | 1.6% | 0.1% | 30.9% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 71.1% | 0.7% | 0.3% | 27.9% | **100.0%** |
| **F. Design and Creative Services** | 81.1% | 0.1% | 0.2% | 18.7% | **100.0%** |
| **Education** | 75.5% | 0.0% | 0.0% | 24.5% | **100.0%** |
| **Total** | **79.7%** | **0.2%** | **0.1%** | **20.0%** | **100.0%** |

### 3.2.9 CCI Employment in the Northern Cape

In 2016, a total of 2 351 people were employed in the CCI sector in the Northern Cape. Of this number, 54.5% were employed in the Design and Creative Services domain, 13.6% in the Education domain, 8.8% in the Audio-Visual and Interactive Media domain, 7.3% in the Performance and Celebration domain, and 4.3% in the Books and Press domain. The remaining 11.6% of CCI employees are employed in the Cultural and Natural Heritage and Visual Arts and Crafts domains.

*Figure 3.11: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 148 | 171 | 124 | 101 | 207 | 1 281 | 320 |
| Whites | 7 | 6 | 23 | 25 | 4 | 252 | 77 |
| Coloureds | 26 | 48 | 67 | 18 | 39 | 361 | 103 |
| Asians | 0 | 0 | 1 | 3 | 2 | 1 | 0 |
| Africans | 115 | 117 | 33 | 56 | 161 | 666 | 139 |

Africans represented the most significant employment group, accounting for 54.8% of total CCI employment in the Northern Cape in 2016, followed by Coloureds (28.2%), Whites (16.8%), and Asians/Indians (0.3%). With the exception of the Visual Arts and Crafts domain, where Coloureds were the dominant group, Africans were the largest group employed in all of the rest of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by Race within each domain.

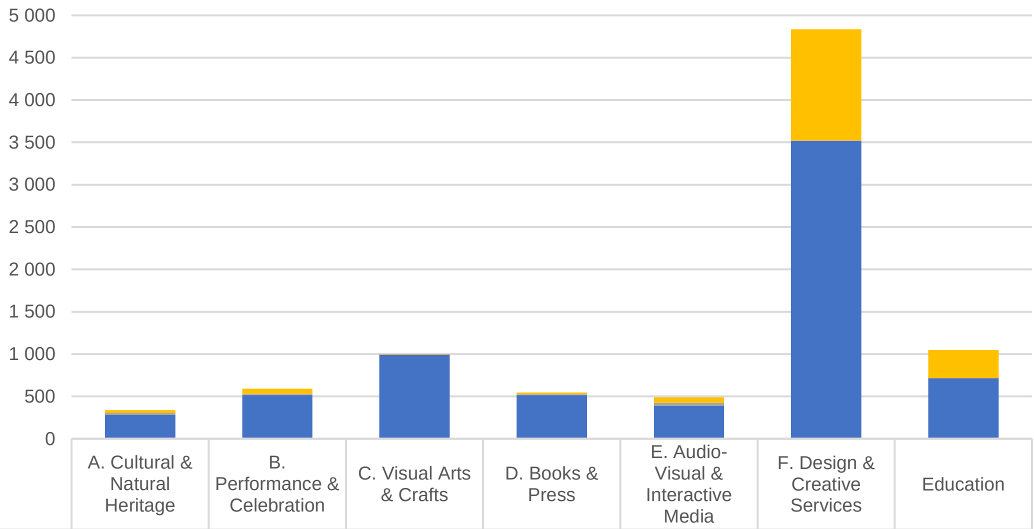
*Table 3.9: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 77.6% | 0.1% | 17.7% | 4.7% | **100.0%** |
| **B. Performance and Celebration** | 68.3% | 0.1% | 28.0% | 3.6% | **100.0%** |
| **C. Visual Arts and Crafts** | 26.4% | 0.8% | 53.9% | 18.9% | **100.0%** |
| **D. Books and Press** | 55.4% | 2.5% | 17.5% | 24.7% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 77.8% | 1.2% | 19.1% | 1.9% | **100.0%** |
| **F. Design and Creative Services** | 52.0% | 0.1% | 28.2% | 19.7% | **100.0%** |
| **Education** | 43.6% | 0.1% | 32.2% | 24.1% | **100.0%** |
| **Total** | **54.8%** | **0.3%** | **28.2%** | **16.8%** | **100.0%** |

### 3.2.10 CCI Employment in the North West

In 2016, a total of 8 847 people were employed in the CCI sector in the North West. Of this number, 54.7% were employed in the Design and Creative Services domain, 11.9% in the Education domain, 11.3% in the Visual Arts and Crafts domain, 5.6% in the Audio-Visual and Interactive Media domain, and 6.2% in the Books and Press domain. The remaining 10.5% of CCI employees are employed in the Cultural and Natural Heritage and Performance and Celebration domains.

*Figure 3.12: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 339 | 591 | 996 | 546 | 491 | 4 835 | 1 050 |
| Whites | 36 | 60 | 1 | 17 | 65 | 1 312 | 333 |
| Coloureds | 22 | 13 | 1 | 9 | 37 | 1 | 0 |
| Asians | 0 | 0 | 1 | 4 | 3 | 5 | 0 |
| Africans | 281 | 518 | 993 | 515 | 386 | 3 516 | 716 |

Africans represented the most significant employment group, accounting for 78.3% of total CCI employment in the North-West in 2016, followed by Whites (20.6%), Coloureds (0.9%), and Asians/Indians (0.2%). Africans were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by Race within each domain.

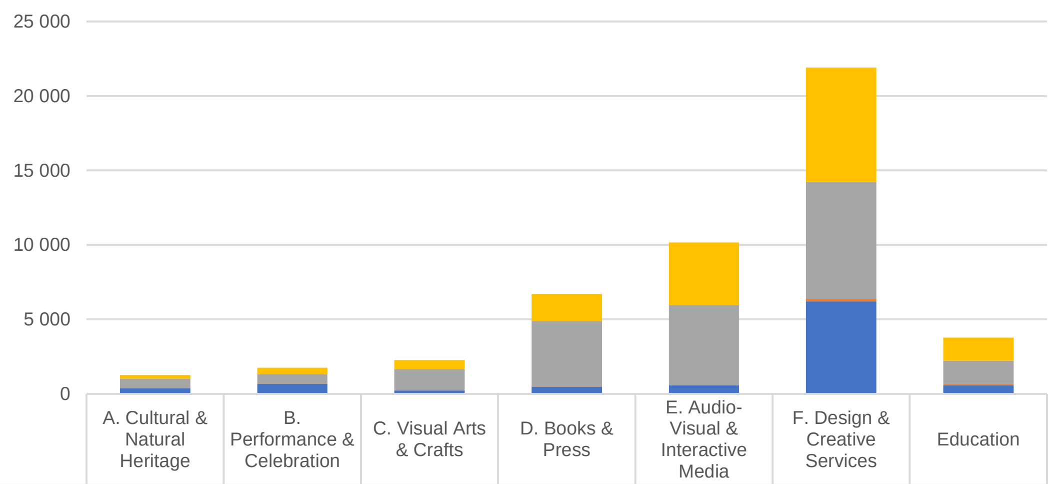
*Table 3.10: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 82.8% | 0.0% | 6.5% | 10.6% | **100.0%** |
| **B. Performance and Celebration** | 87.6% | 0.1% | 2.2% | 10.1% | **100.0%** |
| **C. Visual Arts and Crafts** | 99.7% | 0.1% | 0.1% | 0.1% | **100.0%** |
| **D. Books and Press** | 94.5% | 0.8% | 1.7% | 3.0% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 78.6% | 0.7% | 7.4% | 13.3% | **100.0%** |
| **F. Design and Creative Services** | 72.7% | 0.1% | 0.0% | 27.1% | **100.0%** |
| **Education** | 68.2% | 0.0% | 0.0% | 31.7% | **100.0%** |
| **Total** | **78.3%** | **0.2%** | **0.9%** | **20.6%** | **100.0%** |

## 3.2.11 CCI Employment in the Western Cape

In 2016, a total of 47 827 people were employed in the CCI sector in the Western Cape. Of this number, 45.8% were employed in the Design and Creative Services domain, 21.2% in the Audio-Visual and Interactive Media domain, and 14.0% in the Books and Press domain. The remaining 19% of CCI employees are employed in Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, and Education domains.

*Figure 3.13: Employment by Race within Domain (2016, numbers)*




| | A. Cultural & Natural Heritage | B. Performance & Celebration | C. Visual Arts & Crafts | D. Books & Press | E. Audio-Visual & Interactive Media | F. Design & Creative Services | Education |
|---|---|---|---|---|---|---|---|
| Total CCI employment | 1 269 | 1 749 | 2 263 | 6 707 | 10 160 | 21 900 | 3 779 |
| Whites | 237 | 418 | 614 | 1 828 | 4 192 | 7 679 | 1 559 |
| Coloureds | 658 | 656 | 1 398 | 4 392 | 5 371 | 7 845 | 1 565 |
| Asians | 0 | 0 | 12 | 3 | 17 | 172 | 76 |
| Africans | 374 | 674 | 239 | 484 | 580 | 6 205 | 579 |

Coloureds represented the most significant employment group, accounting for 45.8% of total CCI employment in the Western Cape in 2016; followed by Whites (34.6%), Africans (19.1%), and Asians/Indians (0.6%). Coloureds were the largest group employed in all of the Cultural Domains in this province. The table below provides a percentage breakdown of employment by race within each domain.

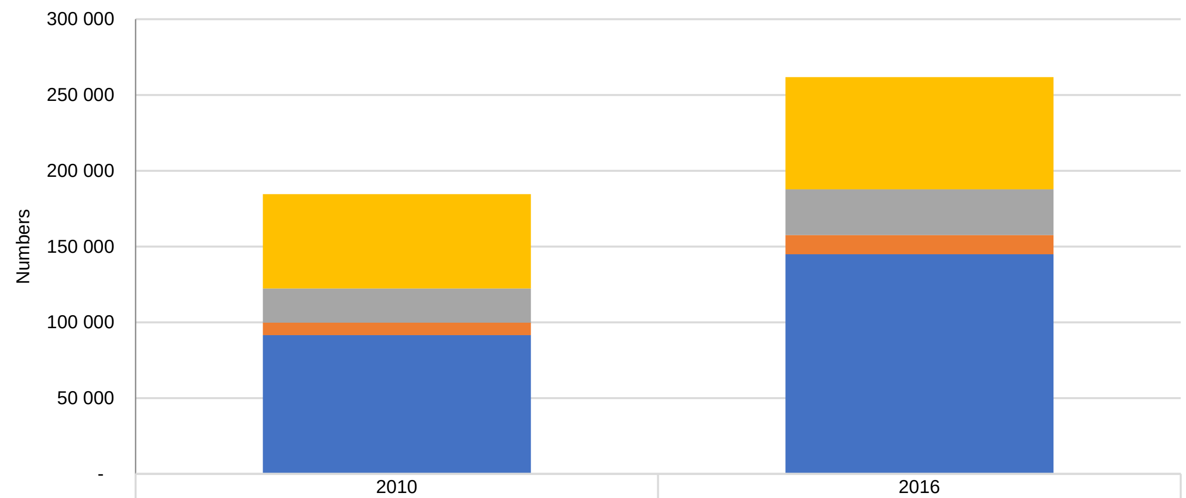
*Table 3.11: Employment by Race within Domain (2016, percentages)*

| | Africans | Asians | Coloureds | Whites | Total CCI Employment |
|---|---|---|---|---|---|
| **A. Cultural and Natural Heritage** | 29.5% | 0.0% | 51.8% | 18.7% | **100.0%** |
| **B. Performance and Celebration** | 38.6% | 0.0% | 37.5% | 23.9% | **100.0%** |
| **C. Visual Arts and Crafts** | 10.6% | 0.5% | 61.8% | 27.1% | **100.0%** |
| **D. Books and Press** | 7.2% | 0.0% | 65.5% | 27.2% | **100.0%** |
| **E. Audio-Visual and Interactive Media** | 5.7% | 0.2% | 52.9% | 41.3% | **100.0%** |
| **F. Design and Creative Services** | 28.3% | 0.8% | 35.8% | 35.1% | **100.0%** |
| **Education** | 15.3% | 2.0% | 41.4% | 41.3% | **100.0%** |
| **Total** | **19.1%** | **0.6%** | **45.8%** | **34.6%** | **100.0%** |

## *3.3 Change in CCI employment over time*

The figure below presents national CCI Employment statistics by racial grouping for the years 2010 and 2016. The figure indicates that total employment in the CCI sector grew from 184 585 in 2010 to 261 837 in 2016.

*Figure 3.14: Change in National CCI Employment over Time (2010 and 2016, numbers)*




| | 2010 | 2016 |
|---|---|---|
| Total | 184 585 | 261 837 |
| Whites | 62 185 | 74 111 |
| Coloureds | 22 621 | 30 197 |
| Asians | 8 288 | 12 721 |
| Africans | 91 489 | 144 808 |

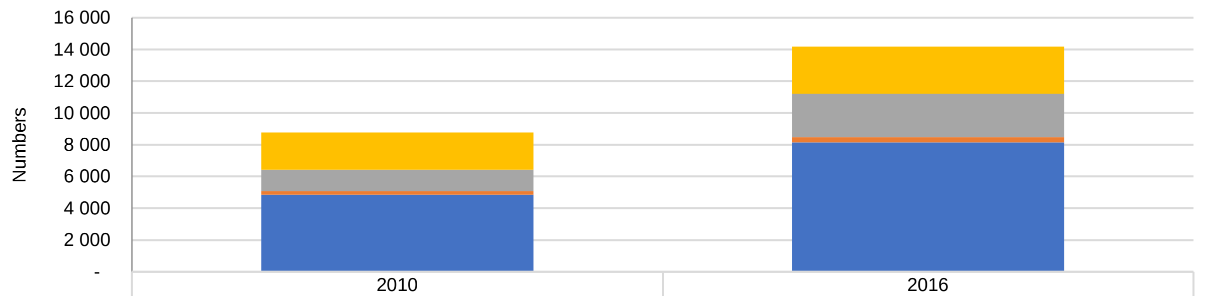
The table below reflects compounded average annual growth rates between 2010 and 2016 for each racial grouping and national employment in the CCI sector; as well as an indexed growth figure for each racial grouping and the national total.

*Table 3.12: Change in National CCI Employment over Time. Compounded Average Annual Growth Rates (percentage) and Indexed Growth*

| Racial group | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 10.51% | 164.8 |
| **Asians** | 18.12% | 229.9 |
| **Coloureds** | 7.97% | 146.7 |
| **Whites** | 1.18% | 106.0 |
| **Total** | **7.24%** | **141.9** |

The table above indicates that employment in the CCI sector grew at an average annual figure of 7.24% between 2010 and 2016, during which time total employment grew by 41.9%. The highest employment growth figures occurred within the Asian (18.12%) and African (10.51%) groupings. What follows are the same statistics for CCI employment growth at a provincial level.

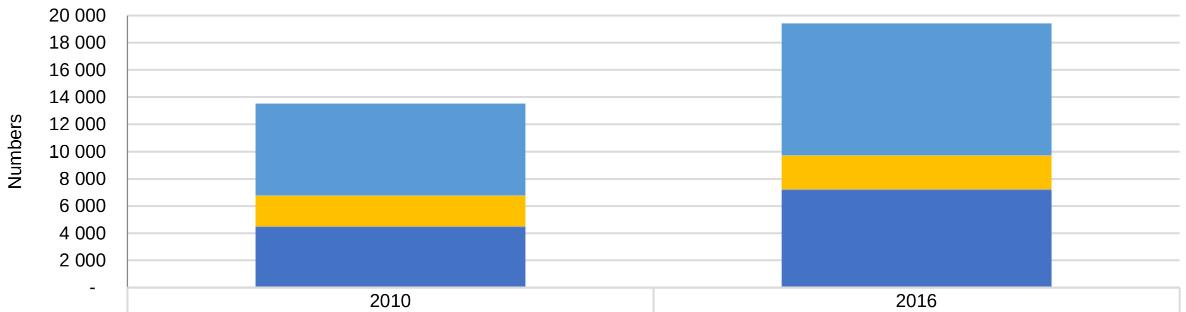
### 3.3.1 Eastern Cape




| | 2010 | 2016 |
|---|---|---|
| Total | 8 769 | 14 182 |
| Whites | 2 330 | 2 955 |
| Coloureds | 1 366 | 2 747 |
| Asians | 217 | 337 |
| Africans | 4 856 | 8 143 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 11.21 | 170.1 |
| **Asians** | -11.01 | 55.8 |
| **Coloureds** | 12.68 | 181.6 |
| **Whites** | -3.85 | 82.2 |
| **Total** | **6.24** | **135.3** |

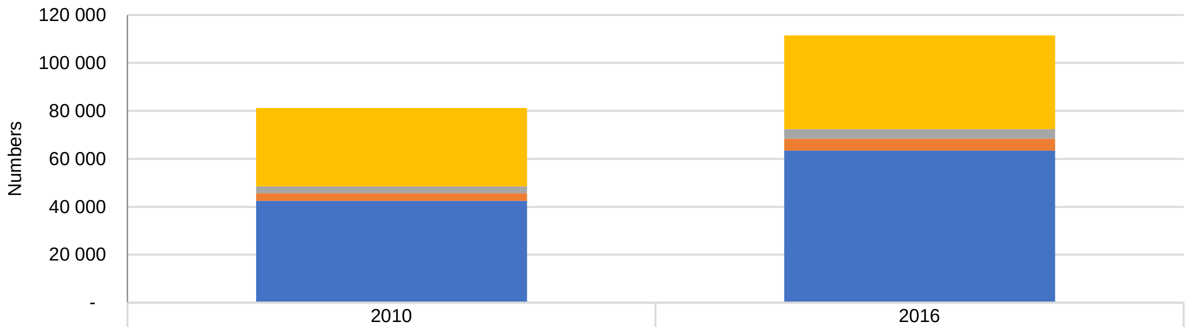
### 3.3.2 Free State




| | 2010 | 2016 |
|---|---|---|
| Total | 6 769 | 9 710 |
| Whites | 2 258 | 2 451 |
| Coloureds | 45 | 71 |
| Asians | 9 | 16 |
| Africans | 4 458 | 7 173 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 25.78 | 314.8 |
| **Asians** | 2.45 | 112.9 |
| **Coloureds** | 26.72 | 326.8 |
| **Whites** | 1.57 | 108.1 |
| **Total** | **16.28** | **212.6** |

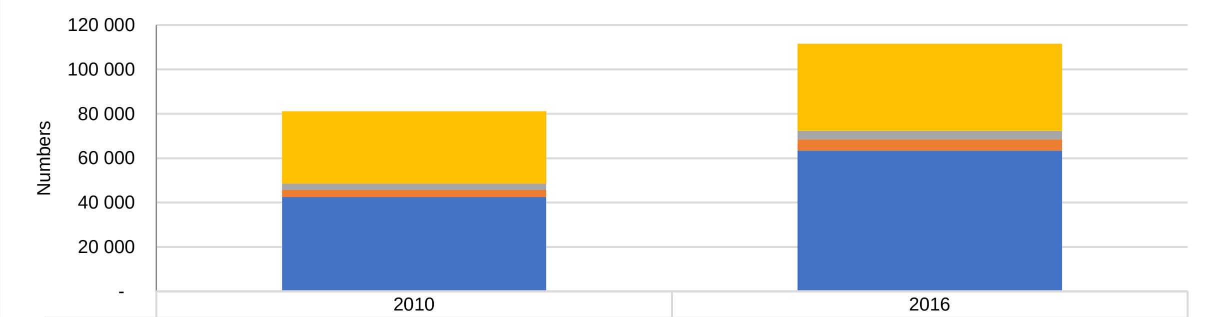
### 3.3.3 Gauteng




| | 2010 | 2016 |
|---|---|---|
| Total | 81 167 | 111 507 |
| Whites | 32 665 | 39 136 |
| Coloureds | 2 840 | 3 923 |
| Asians | 3 240 | 4 986 |
| Africans | 42 422 | 63 462 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 8.57 | 150.8 |
| **Asians** | 25.03 | 305.6 |
| **Coloureds** | 13.87 | 191.5 |
| **Whites** | 3.53 | 119.0 |
| **Total** | **7.24** | **141.8** |

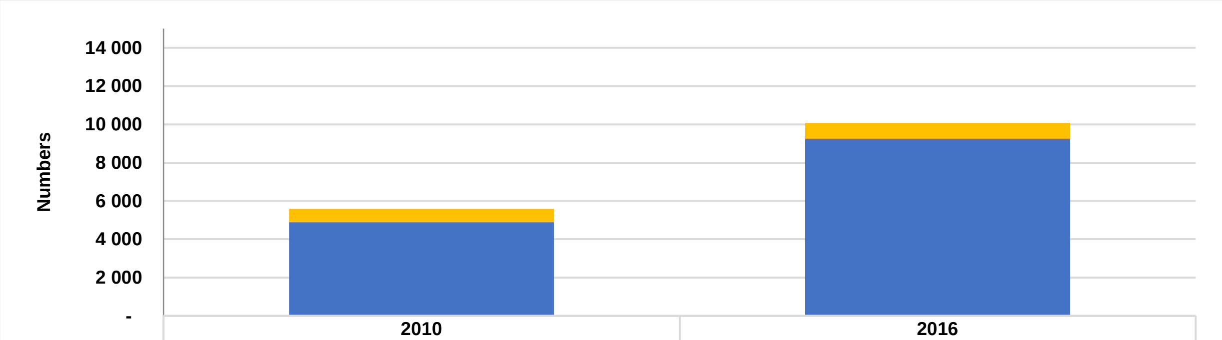
### 3.3.4 KwaZulu Natal




| | 2010 | 2016 |
|---|---|---|
| Total | 81 167 | 111 507 |
| Whites | 32 665 | 39 136 |
| Coloureds | 2 840 | 3 923 |
| Asians | 3 240 | 4 986 |
| Africans | 42 422 | 63 462 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 8.18 | 148.2 |
| **Asians** | 15.88 | 209.0 |
| **Coloureds** | 26.50 | 323.9 |
| **Whites** | -9.09 | 62.1 |
| **Total** | **5.26** | **129.2** |

### 3.3.5 Limpopo

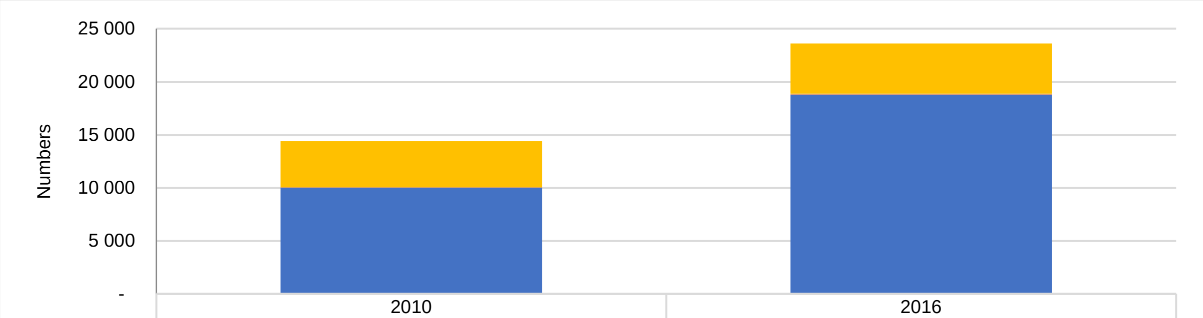



| | 2010 | 2016 |
|---|---|---|
| **Total** | **5 587** | **10 087** |
| **Whites** | **666** | **814** |
| **Coloureds** | **16** | **33** |
| **Asians** | **9** | **11** |
| **Africans** | **4 895** | **9 228** |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 17.52 | 224.1 |
| **Asians** | 8.38 | 149.6 |
| **Coloureds** | 50.23 | 765.2 |

| | | |
|---|---|---|
| **Whites** | 6.52 | 137.2 |
| **Total** | **16.41** | **213.7** |

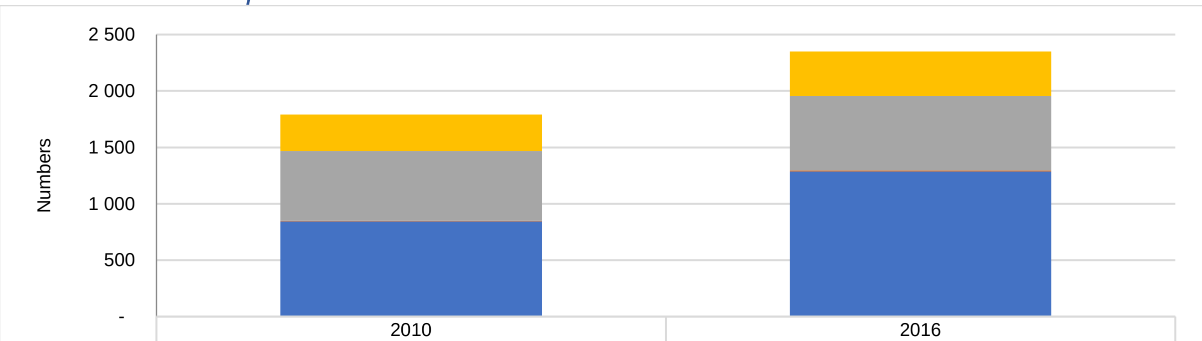
### 3.3.6 Mpumalanga




| | 2010 | 2016 |
|---|---|---|
| Total | 14 417 | 23 591 |
| Whites | 4 362 | 4 714 |
| Coloureds | 14 | 28 |
| Asians | 36 | 58 |
| Africans | 10 004 | 18 792 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 17.85 | 227.3 |
| **Asians** | 58.51 | 1 000.5 |
| **Coloureds** | -36.91 | 10.0 |
| **Whites** | -6.91 | 69.9 |
| **Total** | **8.97** | **153.6** |

### 3.3.7 Northern Cape

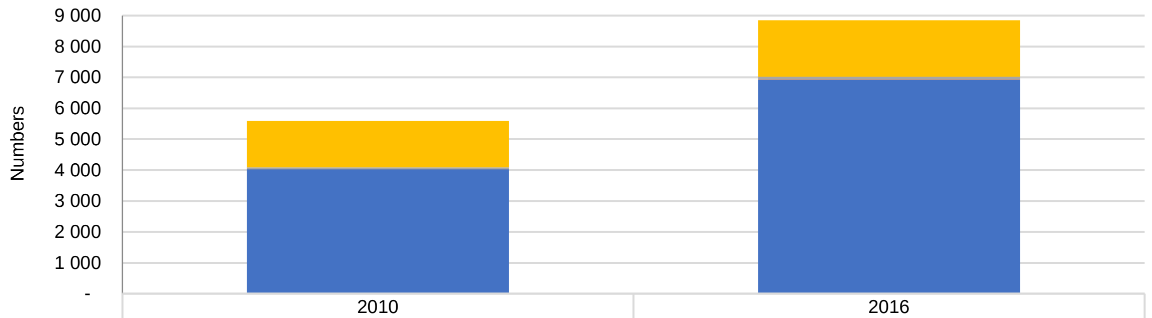



| | 2010 | 2016 |
|---|---|---|
| Total | 1 792 | 2 351 |
| Whites | 323 | 394 |
| Coloureds | 619 | 662 |
| Asians | 6 | 7 |
| Africans | 844 | 1 287 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 9.60 | 158.1 |
| **Asians** | 11.42 | 171.7 |

| | | |
|---|---|---|
| **Coloureds** | -17.82 | 37.5 |
| **Whites** | -15.13 | 44.0 |
| **Total** | **-6.75** | **70.5** |

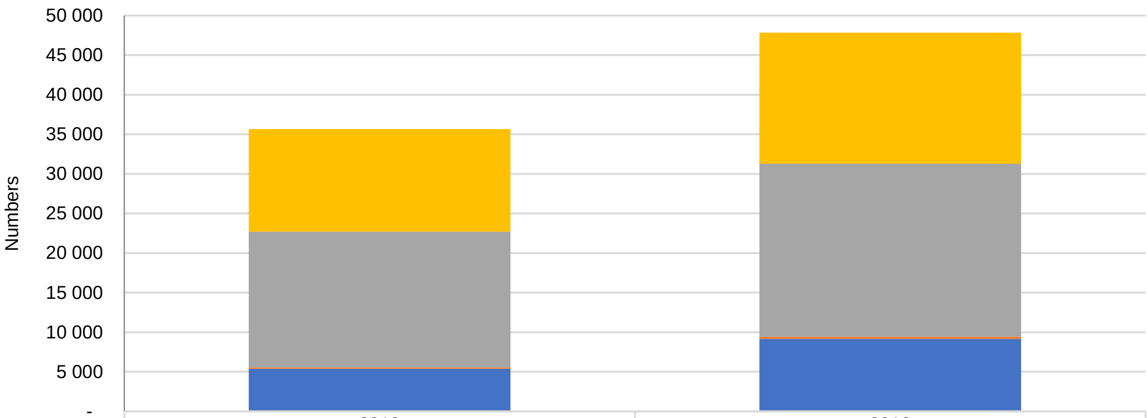
### *3.3.8 North West*




| | 2010 | 2016 |
|---|---|---|
| Total | 5 589 | 8 847 |
| Whites | 1 505 | 1 824 |
| Coloureds | 49 | 83 |
| Asians | 11 | 15 |
| Africans | 4 024 | 6 925 |

| | **Compounded Annual Average Growth Rate (2010-2016)** | **Indexed Growth (2010=100)** |
|---|---|---|
| **Africans** | 12.18 | 177.6 |
| **Asians** | 12.88 | 183.3 |
| **Coloureds** | -26.20 | 21.9 |
| **Whites** | -5.94 | 73.6 |
| **Total** | **5.07** | **128.0** |
| | | |

### 3.3.9 Western Cape




| | 2010 | 2016 |
|---|---|---|
| Total | 35 646 | 47 827 |
| Whites | 12 924 | 16 526 |
| Coloureds | 17 195 | 21 885 |
| Asians | 135 | 280 |
| Africans | 5 391 | 9 136 |

| | Compounded Annual Average Growth Rate (2010-2016) | Indexed Growth (2010=100) |
|---|---|---|
| **Africans** | 4.05 | 121.9 |
| **Asians** | 38.87 | 516.6 |
| **Coloureds** | 8.80 | 152.5 |
| **Whites** | 5.55 | 131.0 |
| **Total** | **6.79** | **138.9** |

## 4. Conclusion

This report reprises much of the findings discusses in the previous four research reports. In terms of national employment, the report confirmed that, in 2016, the CCIs employed roughly 1.7% of the total South African employed labour force (or just over 260 000 jobs). The "Design and Creative Services" domain was the biggest employer, employing roughly 47% of the total CCI workforce, followed by 17% in the "Audio-Visual and Interactive Media" domain. "Cultural and Natural Heritage" was recorded as the smallest domain, both at the national and provincial level.

In terms of transformation, the report found that, from 2010 to 2016, the highest national employment growth figures occurred within the Asian (18.12%) and African (10.51%) groupings. During the same period, the Free State was recorded as having the highest annual average growth of African jobs (26%), while the Western Cape was the worst performer (4%). The report also substantiated findings made in the rest of the mapping study that Blacks currently represent the most significant employment group, accounting for roughly 55% of total national employment in 2016, followed by Whites (28%), Coloureds (11%), and Asians/Indians (5%). In the same year, black African workers represented the most significant employment group in the Limpopo