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The Employment of Youth and Women in Cultural Occupations in South Africa

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MEASURING & VALUING SOUTH AFRICA'S CULTURAL & CREATIVE ECONOMY

Summary

In October 2018, the South African government held a high-profile Jobs Summit. In addition to acknowledging the challenges of the high South African unemployment rates overall, President Ramaphosa mentioned the importance of job creation for youth (15 – 34 years old) and women specifically. Statistics South Africa Quarterly Labour Force Survey (2018) showed that unemployment rates amongst young people have reached 39.3%. The figure is even higher for young black African women who are attempting to enter the labour market (45.9%).

The present study analyses the 2016 Statistics South Africa Labour Market Dynamics Survey (LMDS), using the UNESCO Framework for Cultural Statistics (2009) to identify cultural occupations and cultural industries. The LMDS sample is designed to be representative at national and provincial levels and covers the entire national population aged 15 years and over. The sample size is roughly 33 000 dwellings per quarter (132 000 observations).

Results showed that the creative economy in South Africa (including both cultural and non-cultural support jobs in the CCIs) provided employment for 6.94% of the working population in 2016, an increase from 6.72% in 2015. Youths make up 35% of cultural employment, which equates to 379 000 jobs. Youth who work in the cultural sector are, however, more likely to be employed informally (47.2%) than youth working in non-cultural jobs (33.6%). While not yet representative of the population demographics, the majority of those in cultural occupations are black African (73.2%), coloured people (9.3%) and people of Indian/Asian origin (3.3%).

People in cultural occupations in South Africa are older than those in non-cultural occupations: 34.6% of cultural workers and 39.3% of non-cultural workers fall into the youth category. This may be because of the higher levels of education required in cultural occupations. A concerning finding is that a far lower percentage of female cultural workers fall into the youth category (29.2%) than male cultural workers (38.4%).

In terms of Cultural Domains, 43% of youth in cultural occupations are found in the Visual Arts and Crafts sector, followed by nearly 20% in Design and Creative Services. Findings also showed that there are geographical differences: Provinces with larger cities (such as Johannesburg in Gauteng Province, and Durban in KwaZulu-Natal Province) tend to have a larger share of cultural employment overall. While these provinces also provide more cultural occupations for young people, some of the more rural provinces have a surprisingly large share of youth in cultural occupations. For example, the Eastern Cape Province has only 9.1% of cultural occupations overall, but nearly 13% of youth cultural employment.

As also found in other countries, cultural occupations respond quickly to changes in the economy. Between 2015 and 2016, the number of cultural jobs grew by 6.7%.

The findings suggest that the CCIs in South Africa have a significant role to play in providing jobs for young people, even in more rural areas, but that there are some challenges, such as the under-representation of young women, and the high levels of informality. Implications of the findings for policy are discussed.

Key Findings

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- Cultural and creative occupations made up 2.65% of all jobs in SA in 2016.
- The creative economy (including support occupations) accounts for 6.94% of all jobs, thus providing employment for 1 million South Africans.
- 35% of people in cultural occupations are youth (younger than 35).
- 43% of young people in cultural jobs are employed in the Visual Arts and Crafts domain.
- 86% of people in cultural occupations are black (black African, coloured or Indian/Asian), and 41% are women.
- A challenge is that there are far fewer young women (29%) than young men (38%) working in cultural jobs.
- Cultural occupations are more likely to be in the informal sector (50.5%) than non-cultural jobs (32.4% informal).
- Although cultural jobs are more volatile than jobs in other sectors, the number of cultural jobs grew by 6.7% between 2015 and 2016.

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1. Introduction

The Cultural and Creative Industries (CCIs) are attracting increasing attention worldwide as important contributors to economic growth, innovation and job creation. In 2015, the first world-wide CCIs mapping study was released (CISAC, 2015). Its findings showed that the CCIs employed 29.5 million people, or 1% of the world's population that is in the labour force. Job creation is particularly important in developing countries, like South Africa, which have very high unemployment rates.

Statistics South Africa Quarterly Labour Force Survey (2018) showed that unemployment rates amongst young people (15 – 34 years old) have reached a high level of 39.3%. The figure is even higher for young black African women who are attempting to enter the labour market (45.9%). Previous SACO research (Hadisi and Snowball, 2016) developed a method for tracking cultural employment in South Africa using the internationally comparable UNESCO Framework for Cultural Statistics (2009) and aligning it to the classification system used in the Labour Market Dynamics Survey, which is a national, audited annual database produced by Statistics South Africa. In the 2018 study (Hadisi and Snowball), the method was expanded to include all the “cultural trident”. This includes people working in sectors traditionally classed as cultural or creative (such as fine art, performing art, film, museum, libraries, music, craft etc.) as well as the more commercial sectors (such as designers, architects, advertising and computer programming).

Previous SACO cultural employment research (Hadisi and Snowball, 2018) has shown that the creative economy provides nearly a million jobs. However, young black women are significantly under-represented in the sector, compared to non-cultural jobs. There is thus a need to update the previous report, and to analyse the data to identify employment patterns and types in the CCIs with specific reference to areas where women and the youth may have opportunities or face particular challenges.

2. Goals and Method

The overall goal of the research is to provide an update on the status of cultural economy employment in South Africa, using the newly released Statistics South Africa Labour Market Dynamics Survey data for 2016. The special focus of the report will be on the contribution of

the CCIs to alleviating youth employment in South Africa, and to investigate the opportunities for youth and women in the CCIs.

SACO has developed a method to measure the size and characteristics of cultural and creative industry employment in South Africa (Hadisi and Snowball, 2016). The UNESCO (2009) *Framework for Cultural Statistics* is used to define cultural occupations in six main domains: Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audio-visual and Interactive Media and lastly, Design and Creative Services. Each cultural sector is placed within one specific domain. The Framework also includes Transversal Domains that run across all the six main domains. These include Education and Training; Archiving and Preserving; and Equipment and Supporting Materials.

The newly released 2016 Labour Force Dynamics Survey conducted by Statistics South Africa marks the ninth year of publication of the South African Labour Market Dynamics report since the Quarterly Labour Force Survey (QLFS) was redesigned in 2008. The Labour market Dynamics South Africa (LMDSA) report of 2016 provides information on Labour market trends over the period of 2008 – 2016, from the Quarterly Labour Force Survey (QLFS) panel data.

The sample used in the QLFS is designed to be representative at provincial level and covers the entire national population aged 15 years and over. The QLFS contains a sample size of roughly 33 000 dwellings per quarter (132 000 observations per year). In 2015, the master sample was updated to allow for more accurate identification of sub-groups and adjust for population movement between provinces (Statistics South Africa, 2014 and 2015). The advantages of using national survey data are that (i) it is representative of the population and can thus be reliably used to make national policy suggestions; (ii) results can be compared to other international studies; and (iii) since it is repeated every year, it can be used to track changes in the sector over time.

Research methods are thus:

(i) A literature review of employment in the cultural and creative industries both in South Africa and internationally, with a special focus on the opportunities and challenges for youth and women in this sector; and

(ii) An analysis of the 2016 LMDS data to determine the size and type of employment in the CCIs in South Africa, with a special focus on the opportunities and challenges for youth and women.

The report provides information on:

- The size of cultural and creative employment in terms of the number of people employed and the contribution of the sector to employment in South Africa overall;
- Progress made in transformation in cultural occupations in terms of demographics (such as race and gender) as well as education levels;
- An analysis of the proportion of youth (15 – 34 year olds) working in cultural versus non-cultural occupations;
- An analysis of the cultural domains and geographic areas (provinces) that offer particular opportunities for youth;
- A comparison of the proportion of women working in cultural occupations compared to non-cultural occupations, and a discussion of what the determining factors may be;
- The type of employment in the sector overall, such as the proportion of creative occupations in the formal and informal sectors, short-term contracts, and earnings;
- The presence of provincial cultural occupation clusters, that indicate comparative advantage and could have implications for policy;
- Changes in cultural occupations over time, especially in relation to GDP growth and changes in non-cultural occupation.
- Policy implications of the findings for the employment of youth and women in the cultural sector.

3. Labour market opportunities in the cultural and creative industries: Theory and previous research

In October 2018, the South African government held a high-profile “Jobs Summit”. In addition to acknowledging the challenges of the high South African unemployment rates overall, President Ramaphosa mentioned the youth and women specifically:

“The stimulus and recovery plan recognises that growth alone is not enough – it needs to be accompanied by employment, specifically for young people and women”.

He called on both the public and the private sectors to play a part in developing youth skills and employment.

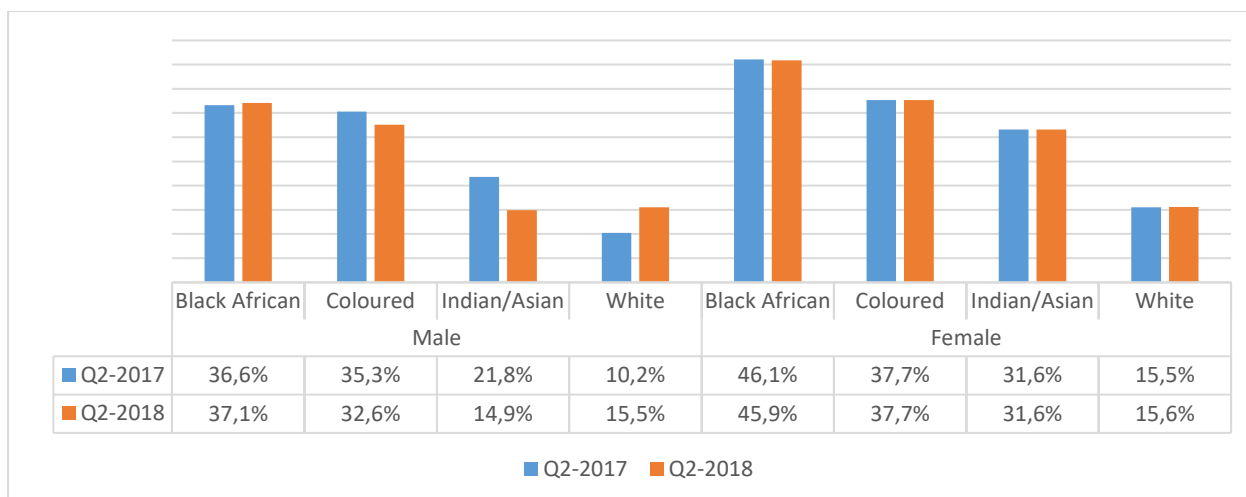


Figure 1: Unemployment Rates for Youth (15 – 34) by race group and gender (Source: QLFS, Q2, 2018: 8)

Statistics South Africa data from the Quarterly Labour Force Survey (QLFS) (2018) shows the higher (and rising) unemployment rate for youth, especially for Black African men (37.1% in quarter 2 of 2018) and even more so for Black African women (45.9% in quarter 2 of 2018).

There are few published studies of factors that determine the potential of youth employment in the CCIs. One rare example is by Abisugu-Oyekunle and Fillis (2017), who used survey research to explore the potential of handicraft micro-enterprises in providing youth employment in the Western Cape province of South Africa. Their study (135 participants) showed that most crafters had a turnover of between R200 and R400 per day or more. However, only about half of the crafters agreed that their business was profitable, and 33% saw it as a low income job. As shown in Table 1, however, 61% of respondents agreed that the craft sector could “allow marginalised youth access to the economy”, and 84% felt that the sector had potential to generate wealth and create jobs.

Table 1: Opinions on the role of the handicraft industry in creating sustainable employment in South Africa

Question	Percentage Agreed
Do you think that this business is a reliable source of employment?	68
Does involvement in the handicraft sector allow the marginalized youth access into the economy?	61
Do you feel that handicraft industries have the potential to generate wealth and create jobs?	84
Do provincial authorities give adequate concern for the development of the handicraft industry?	28

(Source: Abisugu-Oyekunle and Fillis, 2017)

Bille and Jensen (2018) conducted a study of people in arts occupations in Denmark using national time series data. The results show that people in arts careers are vulnerable, and many

switch to other careers over time: “On average, only about 20% of the artists have survived in the occupation after 10 years”. However, the authors identify certain attributes that increase the probability of someone making a sustainable arts career. One of their main findings is that, although having formal artistic education may not affect income in the early parts of an artist’s career, it greatly increases their survival rate in the sector. Exceptions to this finding are visual artists and dancers, where formal artistic education does not statistically significantly affect their chances of remaining in a cultural occupation. Some of the other factors that reduced the chances of leaving the sector were:

- higher earnings,
- working within a relevant cultural industry (as compared to those working in creative jobs, but outside the creative industries),
- years of experience,
- not having to take on a second job, and
- being employed (as compared to those who suffered long periods of unemployment).

The policy implications of these findings are that, for young people wanting to enter the creative sector, factors such as having a formal education, and having access to social networks, and funding will be important factors in determining their success.

Table 2: Percentage of people working in cultural occupations 15 - 25 years old

Country	Percentage	Country	Percentage
Pakistan	33.2	Latvia	8
Mali	21.7	Portugal	7.8
Togo	21.5	Germany	7.7
Honduras	18.7	Costa Rica	7.6
Philippines	17	Lithuania	7.3
Viet Nam	16.6	Estonia	6.8
Malaysia	12.9	Chile	6.7
Mexico	11.7	Republic of Korea	6.7
Austria	9.4	Sweden	6.4
Netherlands	9.4	Romania	5.1
Canada	9.2	France	5
Thailand	8.6	Spain	3.4
Malta	8.5	Italy	3
Puerto Rico	8.4	Greece	2.9

Source: UNESCO database for Survey of Cultural Employment (2015)

Several countries have data that shows that there has been significant growth in the jobs in CCIs. For example, in 2016, they made up just over 5% of the UK economy, which translates

to about 1.9 million jobs. In fact, between 2013 and 2014, jobs within the CCIs grew by 8.9%, as opposed to a 4.6% growth for the overall economy (DCMS, 2016). As shown in Table 2, the percentage of people working in cultural occupations in the 15 -24 age group, although it varies, tends to be higher in developing economies (for example, more than 20% of cultural workers in Togo, Mali and Pakistan are younger than 25). However, many studies also find that there is an underrepresentation of “...women in key cultural sectors such as film, TV, radio, photography, IT and architecture” (Creative Skillset, 2014 in Oakley *et al*, 2017). Indeed, Conor et al. (2015) find that fields such as film, television and music are characterised by high and worsening gender, race, class, age and disability inequalities. The authors conclude that, without intervention, employment in the CCIs has not resulted in less inequality, particularly in term of gender-based employment.

Table 3: Percentage of people employed in cultural occupations who are self-employed.

Country	All	Males	Females	Country	All	Male	Female
Mali	87.6	81.7	93.2	Germany	34	33.8	34.3
Chile	60.2	51.7	69.7	Belgium	33.1	37.3	27.4
Honduras	56.5	48.5	65.8	Republic of Korea	32.8	35.7	30.3
Ecuador	55.1	49.9	60.9	France	31.7	31.3	32.4
Pakistan	55.1	46.2	69.9	Sweden	31.4	38.1	25.1
Sri Lanka	53	50.8	54	Austria	30.7	30.2	31.4
Cabo Verde	48.7	51.1	41.3	Malta	28.8	33.1	21.3
Malaysia	46.4	27.7	59.6	Turkey	27.2	21.6	36.2
Italy	45.8	51.3	38.6	Serbia	26.1	36	17.6
Cyprus	45.3	45.3	45.3	Slovenia	25.4	27.6	22.9
Thailand	43.3	41.6	44.9	Hungary	23.7	26	21.3
Mexico	42.2	38.7	47.7	Portugal	20	23.3	16.2
Czechia	38.9	45.1	32.4	Cayman Islands	16.3	17.1	15.4
Greece	38.1	43.1	33	Croatia	16.1	20.4	12
Viet Nam	37.8	37.3	38.1	Philippines	14.6	9.6	18.1
Canada	36.3	36.8	35.8	Bulgaria	12.5	22.2	7.6
Spain	35.2	38.2	30.9				

Source: UNESCO database for Survey of Cultural Employment (2015)

The CCIs thus have the potential to provide entry into the labour market for young people, and lead the way in providing flexible working conditions for the “precariat” – group of highly educated professionals who work at skilled jobs on a contract, freelance basis. Some research has shown that the changing nature of work, driven by changes in technologies of the 4th Industrial Revolution, means that specialist teams of people working together on specific

projects for a short time are likely to become more common than traditional, full-time permanent employment within an established firm (McRobbie, 2016). The UNESCO data (2015) in Table 3 shows that, in many countries, a large percentage of people in cultural occupations are self-employed. In developing economies, a greater percentage of women in cultural occupations are self-employed than their male counterparts.

While short-term contract production methods have been in place for some time in creative production and can offer various and interesting opportunities to young people, this kind of work is also characterised by long and erratic working hours, periods of no, or low pay, lack of job security, and higher stress (McRobbie, 2016). Some studies have also shown that such working conditions are particularly difficult for women (who tend to have more family care responsibilities) and for people from working class backgrounds, who may have more difficulty developing the business and social networks that are so vital for success (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O'Brien et al., 2016; Hennekam and Bennett, 2017).

In 2018, the South African National Film and Video Foundation (NFVF), in partnership with Sisters Working in Film and Television (SWIFT), produced a report entitled “Gender Matters in the South African Film Industry” (NFVF, 2018). Based on a survey of 512 people, the research found that challenges faced by women in the film industry included earning lower salaries than their male counterparts, having slower career progression, high levels of harassment at work, and not being represented in key decision-making positions. The vast majority (88%) felt that women were not given the same career growth opportunities as men. Because of the short-term contract nature of the industry, the majority of women worked on a per project basis (58%), making networking a very important part of securing work. The currently male-dominated networks in the industry thus act to perpetuate the challenges faced by women.

However, there are also some innovative ideas that can help young people to enter the CCIs. For example, Avdikos and Kalogeresis (2016) studied the working conditions and socio-economic profile of freelance design workers in Greece. They acknowledge that, because of the precarious nature of employment, “no one, not even those in traditional professions can expect a fixed pattern of employment”. This has given rise to the development of co-working spaces that allow the sharing of ideas and resources. The introduction of such hybrid workspaces and co-working spaces has allowed freelancers and the self-employed to maximise

virtual and geographic proximity. This is particularly important considering the importance of CCIs and the digitisation of the world. While older workers might resist such new methods of production, the study of the Greek design industry revealed that youth (aged 18-30) preferred co-working spaces, to the traditional individual office or firm plan layouts.

The #MeToo movement has highlighted the unacceptable levels of workplace harassment experienced by women in some parts of the creative industries. Respondents to the NFVF survey made some recommendations on how to overcome the gender bias against women in the film and television industry in South Africa, such as providing education for women in the industry on their rights, and the introduction of “a safe and easy way” for women to report workplace sexual harassment. At the recent Film Summit held in Johannesburg (4-5 February, 2019), the Department of Trade and Industry (dti), who are one of the largest funders of film in South Africa, indicated that they would no longer fund organisations where women were harassed or unfairly treated.

In conclusion, the CCIs have the potential to create jobs and provide a flexible labour-market entry point for young people and women. However, there may be a need for some policy intervention to ensure the sustainability of the sector, especially in term of support for women and young entrepreneurs. The rest of this report presents the results of research into cultural employment in South Africa, with a special focus on conditions for women and youth.

4. A demographic profile of workers in cultural occupations in SA

In terms of transformation, the majority of those in cultural occupations in South Africa are black African (73.2%), followed by whites (14.2%), coloured people (9.3%) and people of Indian/Asian origin (3.3%). Compared to non-cultural occupations, white people (who make up 11.6% of those in non-cultural occupations) are still over-represented in cultural occupations overall.

However, there are significant differences between domains. For example, workers in the Visual Arts and Crafts domain are 82.8% black African, 8.8% coloured people, 2.5% of Indian/Asian origin, and 5.9% white. Conversely, Design and Creative Services remains less transformed, with 33.4% of workers in this domain being white people, followed by 44.3% black Africans, 15.2% coloured people, and 7.2% are of Indian/Asian origins. Books and Press has 63.3% black Africans, 14.4% coloureds, 1.6% Indian/Asians and 20.7% whites working in this domain.

It is also noteworthy that the youth in cultural occupations are more transformed than older workers (Figure 2): 75.2% of young cultural workers are black Africans, 8.6% are coloured people and 2.9% are of Indian/Asian origins, and 13.3% are white. The increasingly diverse make-up of younger workers indicates that the cultural sector is transforming and is likely to become more representative over time.

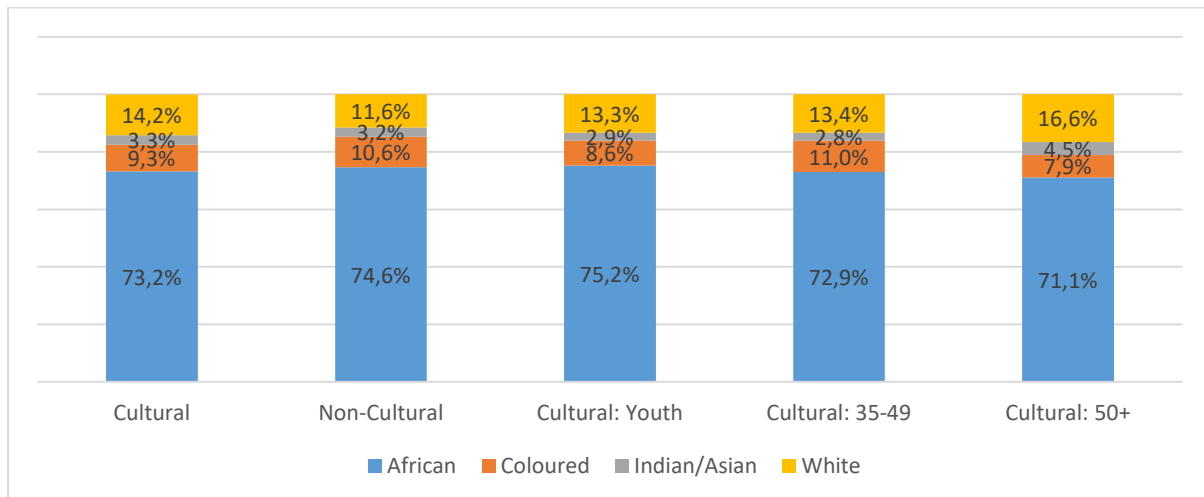


Figure 2: Cultural workers by race group and age.

In terms of gender (Figure 3), 58.6% of those in cultural occupations are men, and 41.4% are women, pointing to the gender bias found in other studies also being present in South Africa. Moreover, when compared to the gender of those in non-cultural occupations, a very similar picture emerges. 57.6% of those in non-cultural occupations are men. Thus, while a slightly higher proportion of cultural workers are men than non-cultural workers, there is no great difference between the cultural and non-cultural workers. Rather, the gender bias appears to be present throughout the South African labour market.

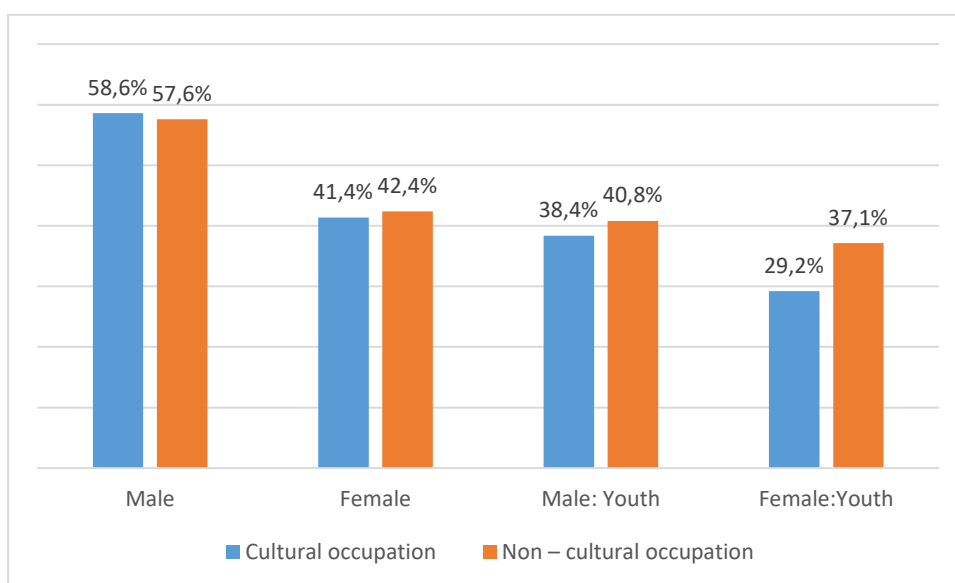


Figure 3: : The intersection of age and gender for cultural workers

The intersection between age and gender in cultural employment is noteworthy (Figure 4). In general, people in cultural occupations are older than those in non-cultural occupations: 34.6% of cultural workers and 39.3% of non-cultural workers fall into the "youth" (15 - 34) category. This may be because of the higher levels of education in cultural occupations, but when one looks at gender in cultural occupations by age group, a different picture emerges. A far lower percentage of female cultural workers fall into the youth category (29.2%) than male cultural workers (38.4%). This pattern has been found in previous years as well (see Hadisi and Snowball, 2017) and presents a challenge for CCI job creation for young women.

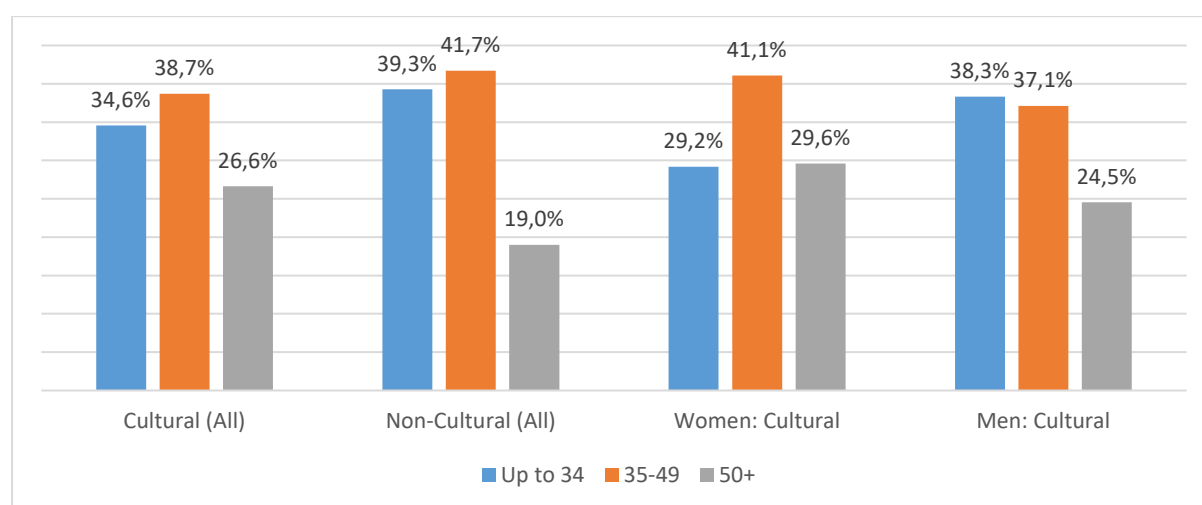


Figure 4: Cultural workers by gender and age group

5. Cultural Employment Types, Education and Earnings

In general, a far higher percentage of cultural workers in South Africa are employed informally (50.5%) than non-cultural workers (32.4%), which is what would be expected, given the short-term, temporary nature of much cultural work. The gender differential in terms of formal versus informal sector employment was, however, low: about half of both men (51.2%) and women (49.6%) in cultural occupations work in the informal sector (Figure 5).

While some labour market researchers regard the informal sector as a fallback position for those unable to get jobs in the formal sector (Hillenkamp *et al.*, 2013), others argue that the informal sector provides sustainable employment in its own right (Perry *et al.*, 2007). Especially for those operating in sectors with volatile demand, like the cultural sector, operating informally can have advantages, such as more flexible employment terms, the ability to pull together diverse teams of expertise and produce goods and services quickly, and avoidance of administrative costs and taxes. For example, Lobato (2010) demonstrates how the Nigerian

film industry, which began as an entirely informal creative industry, was nevertheless able to grow and develop. However, informality does not provide job security or protection from unfair labour practices and, for businesses, may not allow access to government loans and other assistance.

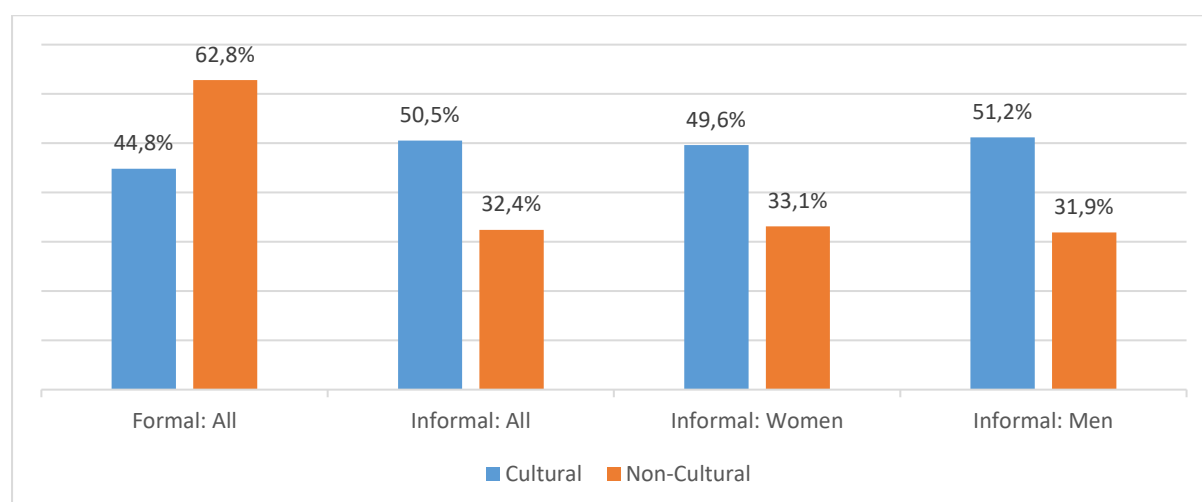


Figure 5: Cultural Employment in the formal and informal sector by gender

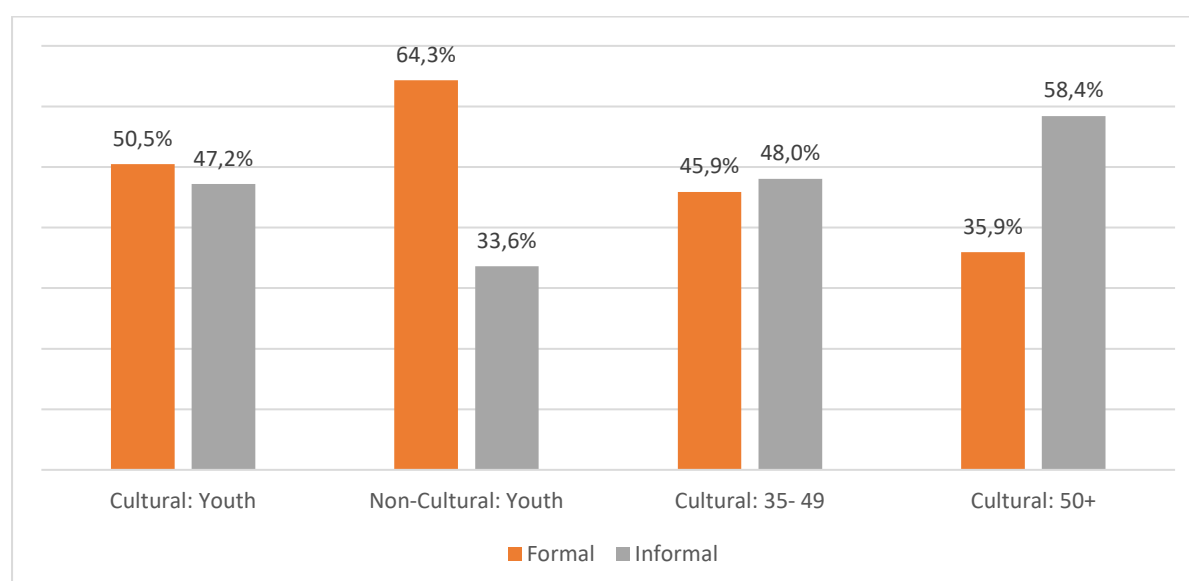


Figure 6: Cultural Employment in the formal and informal sector by age group.

Youth (15 - 34) who work in the cultural sector are much more likely to be employed informally (47.2%) than youth working in non-cultural jobs (33.6%). However, comparing cultural workers across the age groups shows that there is generally a high level of informality, and that it is actually highest for the 50+ age group (58.4% employed informally).



Figure 7: Types of employment in the cultural sector by gender

Cultural workers are much less likely than non-cultural workers to be “working for someone else for pay” (84% of non-cultural workers, compared to only 58.7% of cultural workers fall into this category). As found in other countries as well (Table 3) a higher proportion of cultural workers are freelance (“own account workers”). Given that much of the work in the cultural sector is project-based, it is not surprising that there are many more freelance workers. As with the informal sector, the flexibility offered by this production mode can be valuable and is likely to become more prevalent in all sectors of the economy, but it also offers little job security and sometimes long hours. It is noteworthy that a greater percentage of women (40.4%) than men (31.6%) work as freelance operators in cultural jobs. Although the numbers are small, there are also more women (1.4%) than men (0.4%) in cultural occupations who are volunteers (“helping without pay”).

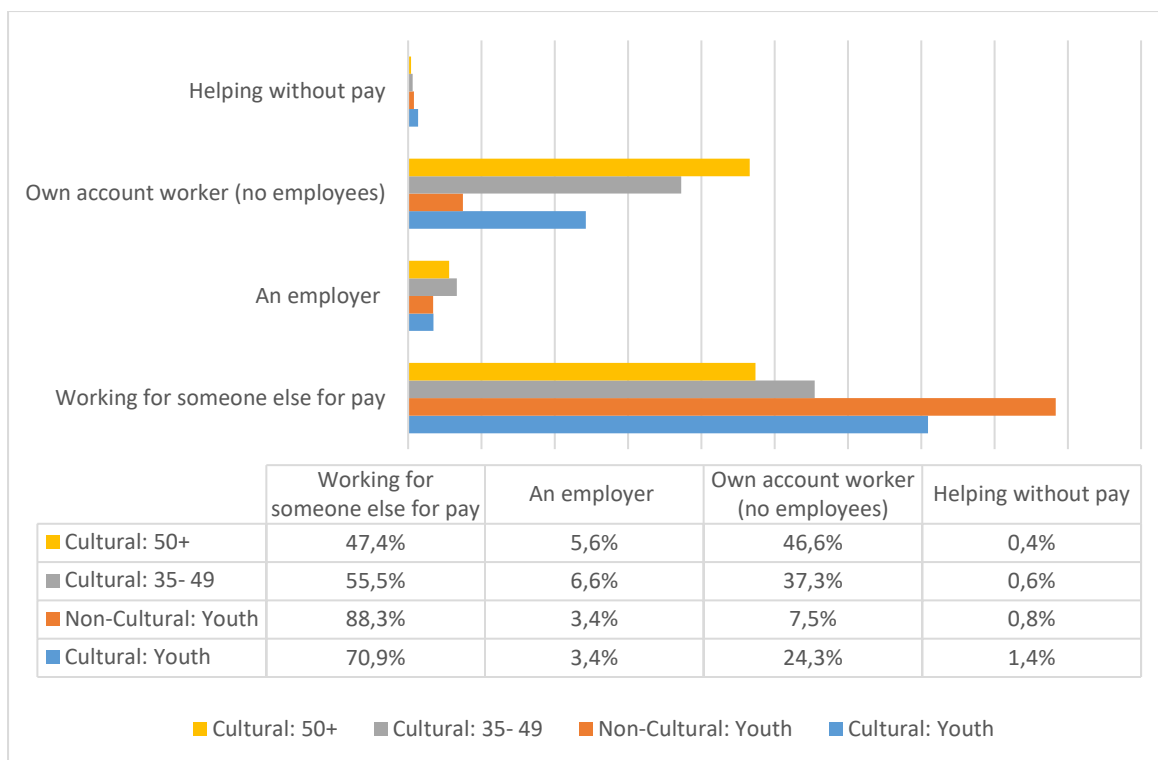


Figure 8: Types of employment in the cultural sector by age group

Youth in cultural occupations are mostly employed for a salary by someone else (70.9%), but this is still a lower proportion than youth in non-cultural jobs (88.3%). Being an employee may offer less flexibility and independence than being an “own account” worker, but it can be helpful in building the skills and experiences of young people. In the cultural sector, the proportion of “own account” workers increases from 24.3% for youth to 46.6% for older (50+) workers, which is what one would expect.

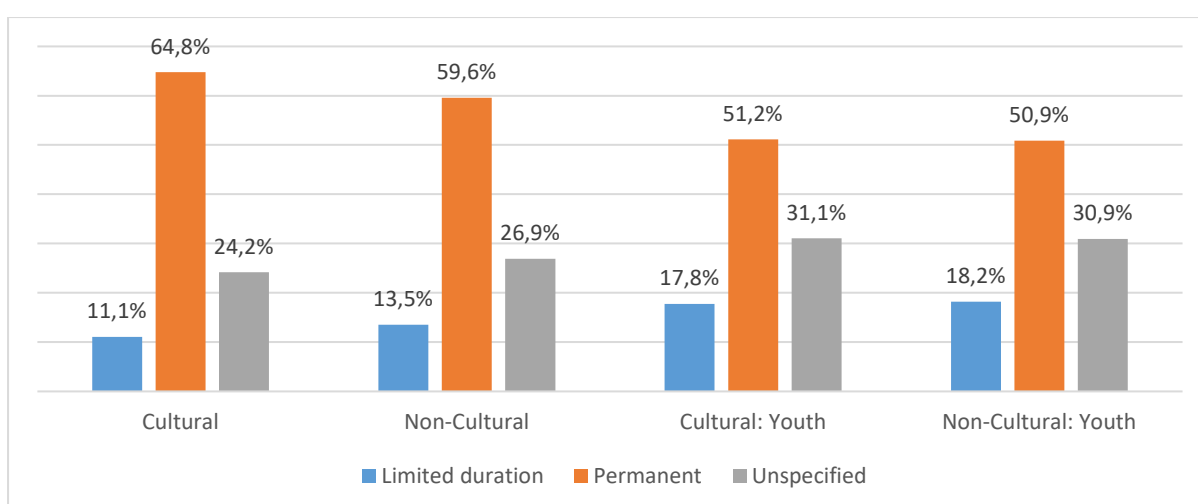


Figure 9: Permanent employment in cultural occupations for young people

In terms of employment type, cultural workers were actually slightly more likely to be permanently employed (64.8%) than non-cultural workers (59.6%). A lower percentage of youth in cultural occupations are permanently employed (51.2%) than in the cultural sector overall (64.8%), but young cultural workers have very similar employment types to young non-cultural workers. The lower percentage of young cultural workers in permanent jobs is thus more likely to be because they are just starting out in the labour market, and are thus more likely to be employed in short-term contracts, or to be on probation, than because they are working in the cultural sector.

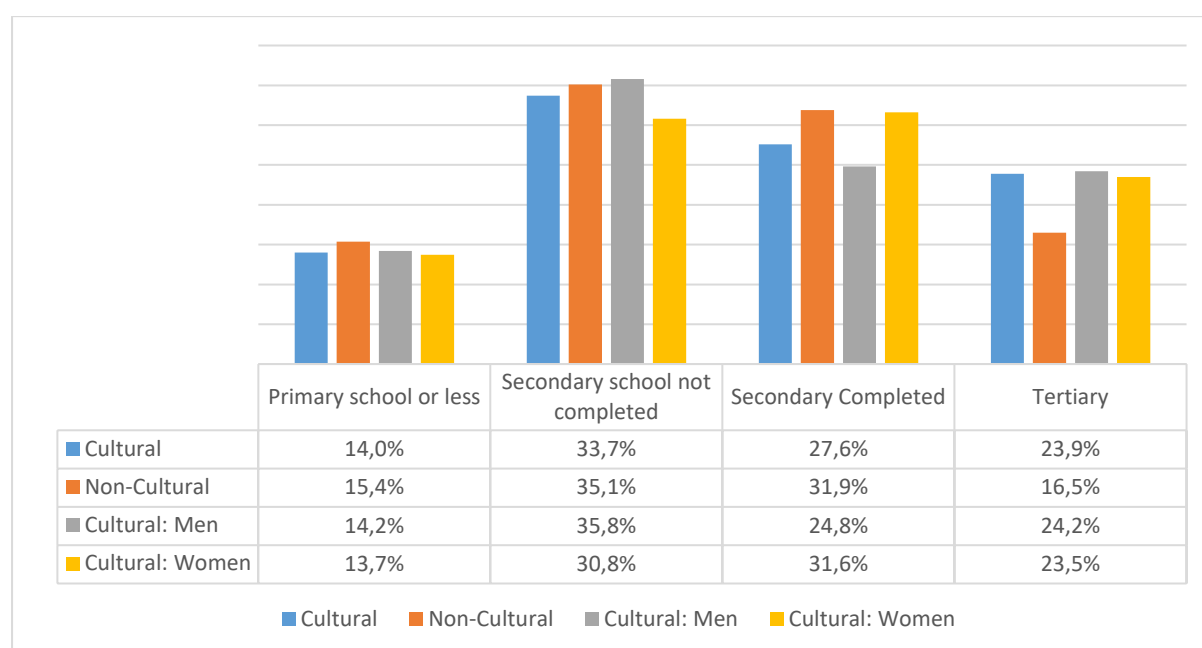


Figure 10: Education levels in cultural occupations by gender

In general, workers in cultural occupations are better educated than workers in non-cultural occupations: 23.9% of cultural, and only 16.5% of non-cultural workers have completed tertiary education.

It is also shown that more women working in the cultural sector have passed matric (that is, completed secondary school) than men working in cultural occupations (24.8% of men and 31.6% of women in cultural occupations have passed matric). However, a slightly greater proportion of men (24.2%) than women (23.5%) have tertiary education.

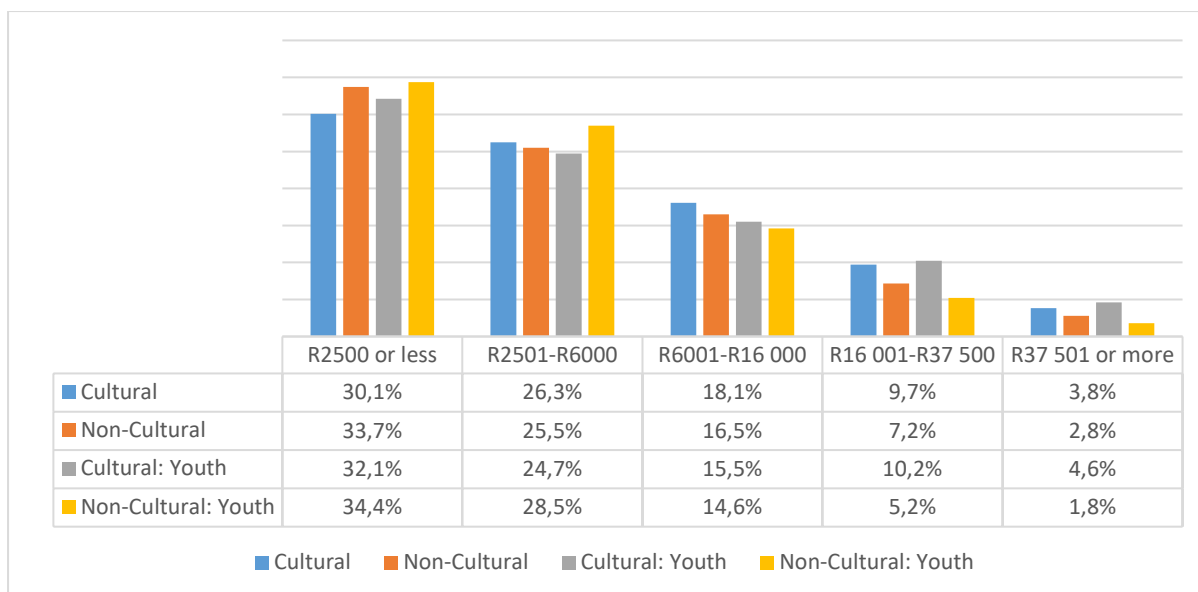


Figure 11: Earnings in cultural occupations

(Note that numbers do not add up to 100% because of a small group (an average of 13.6%) who refused to answer this question).

As expected, given the higher education levels of those in cultural occupations, cultural workers earn slightly more than non-cultural workers. In particular, cultural workers make up a larger percentage of those who earn R16 000 per month or more (13.5%) than non-cultural workers (10%) and a lower percentage of those who earn R2500 per month or less (30% of cultural workers and 33.7% of non-cultural workers). Similarly, a comparison between youth in cultural and non-cultural occupations shows that young people employed in the cultural sector earn more, with 30% of young cultural workers, compared to 22% of non-cultural workers earning more than R6000 per month.

6. Employment by cultural domain and location

As found in previous studies (Hadisi and Snowball, 2018), the domain that offers most jobs in the cultural sector is Visual Arts and Crafts (44.3%), followed by those working in “Intangible Cultural Heritage” (23.3%) (that includes Traditional chiefs and heads of villages, Religious professionals, Traditional medicine practitioners, Faith healer and Religious associate professionals) then Design and Creative Services (12.8%) and Books, Information and Press (12.8%).

Table 4: Cultural occupations by Cultural Domain

Domain	Percentage of cultural employment
A. Cultural & Natural Heritage (Including intangible heritage)	0.6%
B. Performance & Celebration	4.5%
C. Visual Arts & Crafts	44.3%
D. Books, Information & Press	12.2%
E. Audio visual & Interactive Media	2.3%
F. Design & Creative Services	12.8%
(ICH) Intangible Cultural Heritage/ Transversal domain	23.3%

As shown in Table 5, young people working in cultural occupations are also mostly found in the Visual Arts and Crafts domain (43.1%), but the next most popular is the Design and Creative Services sector (19.6%). This is an encouraging finding, as the SACO Mapping Study of 2018 showed that, in terms of their financial contribution to GDP, the Design and Creative Services domain contributes the most (45% of the GDP contribution of the cultural economy comes from this sector) and that it is also one of the fastest growing areas.

Table 5: Cultural occupations by Domain and age group

Domain	Percentage of Youth	Percentage of 35-49 year olds	Percentage of those aged 50+
A. Cultural & Natural Heritage (Including intangible heritage)	1.6	0.2	0.0
B. Performance & Celebration	5.8	4.7	2.4
C. Visual Arts & Crafts	43.1	48.1	40.5
D. Books, Information & Press	13.8	11.4	11.3
E. Audio visual & Interactive Media	2.1	3.6	0.5
F. Design & Creative Services	19.6	11.3	6.2
(ICH) Intangible Cultural Heritage/ Transversal domain	14.1	20.7	39.2
Total	100%	100%	100%

As found in other studies, cultural occupations tend to cluster in those provinces that have large cities. Gauteng Province provides more than a third (34.6%) of cultural occupations, followed by KwaZulu-Natal (17.6%) and the Western Cape (12.1%). A surprise is that Limpopo Province has nearly 10% of cultural occupations, pointing towards ongoing growth in this province.

Table 6: Cultural Occupations by Province

Province	Percentage of cultural occupations	Percentage of Non-Cultural occupations	Percentage of total employment
Gauteng	34.6	31.0	31.0
Western Cape	12.1	14.7	14.7
Mpumalanga	7.2	7.5	7.5
KZN	17.6	15.8	15.9
Limpopo	9.9	8.8	8.8
Free State	4.5	5.2	5.2
North West	3.5	6.1	6.0
Eastern Cape	9.1	9.0	9.0
Northern Cape	1.5	2.1	2.1

Identifying comparative advantage, however, means that one has to take into account the relative share of cultural employment in each province, given their share of overall employment. Location Quotients (LQs) can be used to further identify locational concentrations or clusters within a region. If X' and Y' are similar data points for some larger reference region (like a province), then the LQ or relative concentration of that sector in the province compared to the nation is given by the equation:

$$LQ = \left(\frac{X}{Y}\right) / \left(\frac{X'}{Y'}\right)$$

Where X = cultural jobs in the province; Y = cultural jobs in the country; X' = all jobs in the province; and Y' = all jobs in the country. An LQ of more than one would indicate that the province has a relative concentration of cultural jobs compared to other provinces, and show what makes a regional economy unique. Combined with job information on the size of the sector, LQs can identify potential industry development nodes.

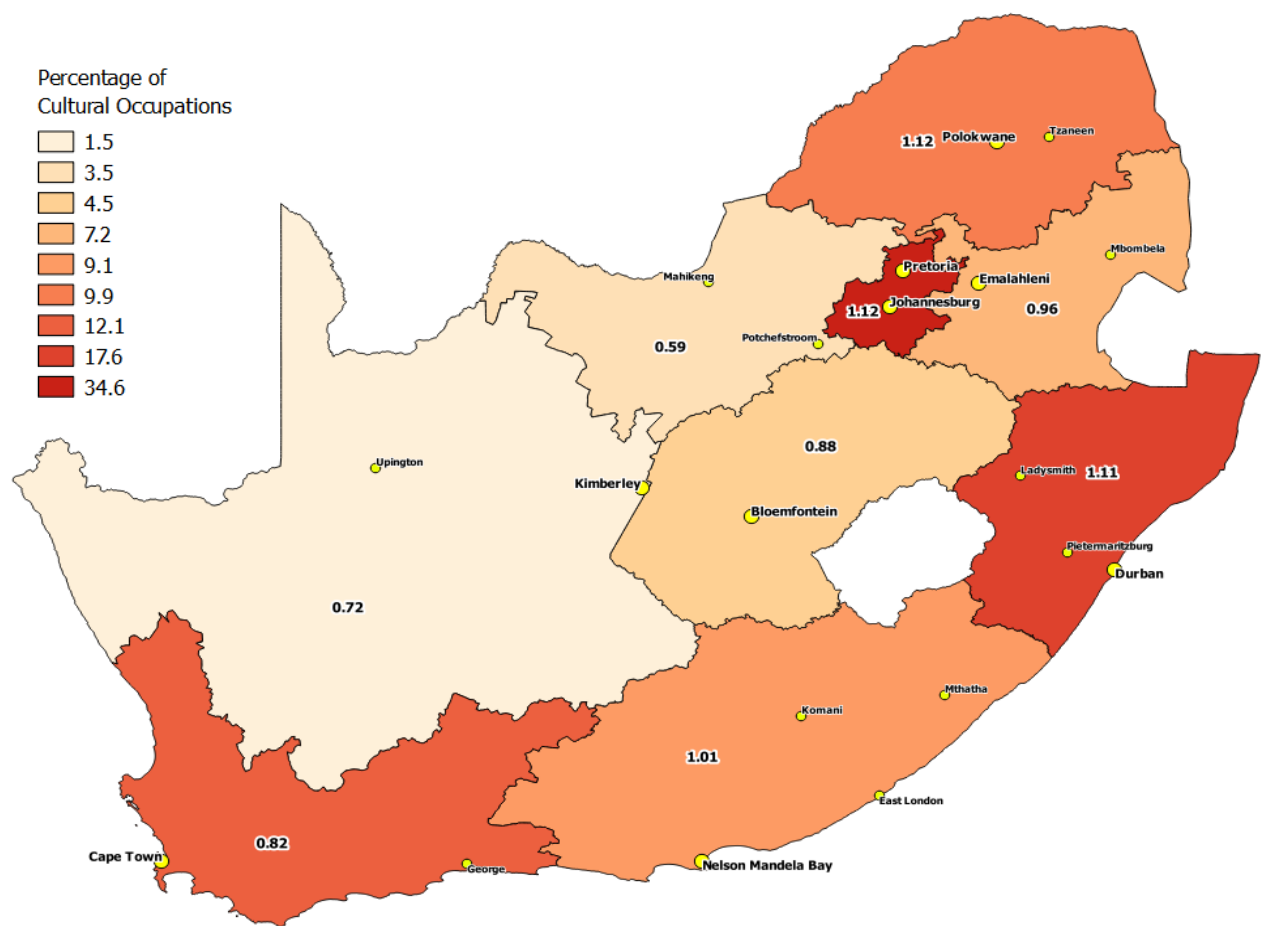


Figure 12: Identifying comparative advantage: Provincial location quotients

Location quotients have to be interpreted together with the size of the sector. For example, Limpopo province has the highest LQ (1.12) which does indicate a potential cultural occupation growth potential. However, Limpopo only has 9.9% of all the cultural occupations in South Africa, so in terms of size, it is ranked lower than Gauteng (34.6%), the Western Cape (12.1%) and KwaZulu-Natal (17.6%). In the case of Gauteng, not only does it have the largest proportion of people working in cultural occupations in South Africa, but it also has a greater share of cultural occupations than jobs overall (34.6% of cultural occupations, compared to 31% of jobs overall), thus giving it a LQ score of more than one.

Table 7: Youth Employment in creative occupations by location

Province	Cultural: Youth	Non-Cultural: Youth	Cultural: 35- 49	Cultural: 50+
Gauteng	36.1	27.0	34.4	32.9
KZN	18.5	16.6	15.3	19.8
Eastern Cape	12.8	10.0	6.5	8.0
Limpopo	10.7	9.7	8.4	11.1
Western Cape	8.5	15.0	14.6	13.1
Mpumalanga	6.3	8.1	8.5	6.3
Free State	3.2	5.3	6.2	3.9
North West	2.7	6.0	4.4	3.3
Northern Cape	1.2	2.3	1.7	1.6
Total	100%	100%	100%	100%

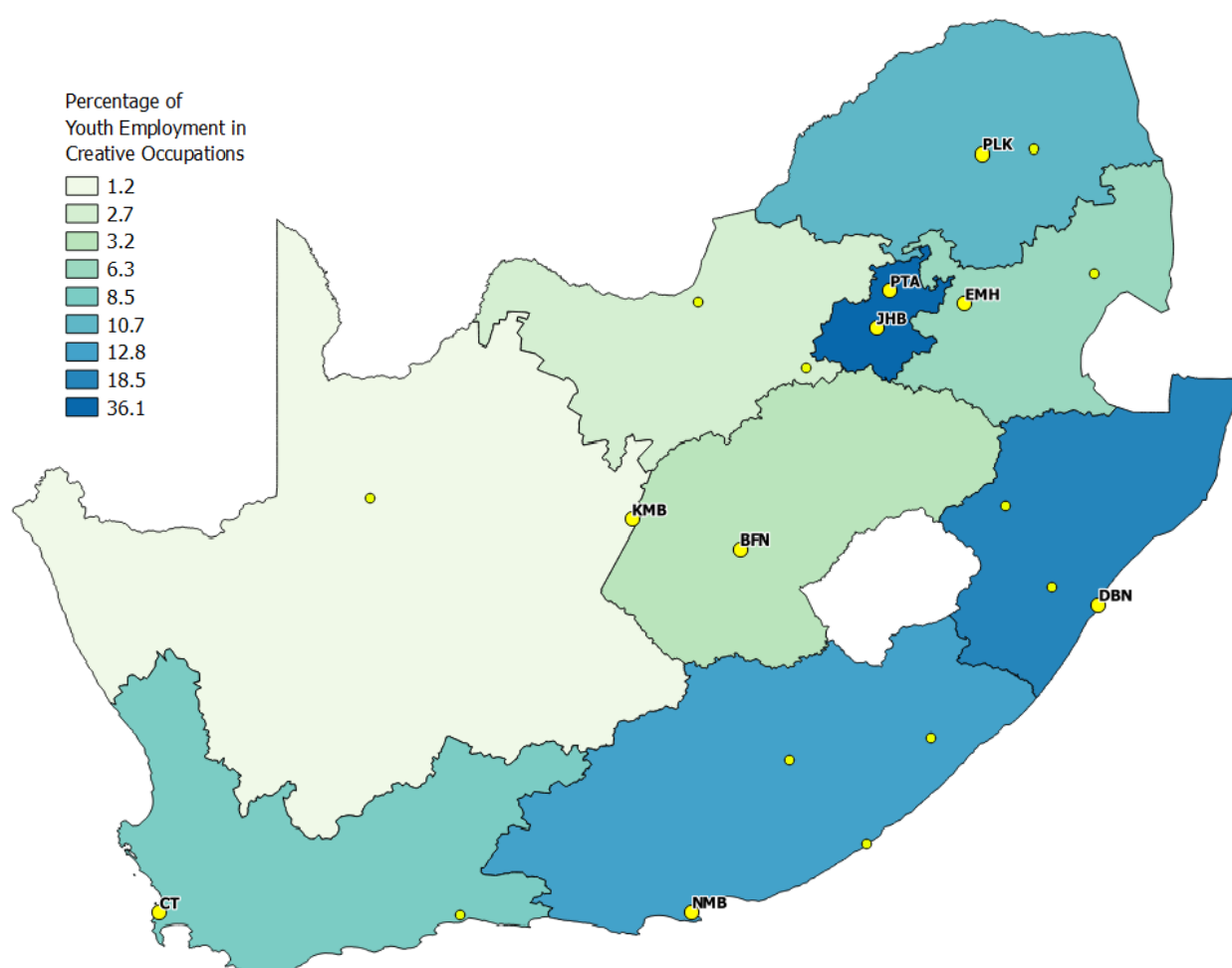


Figure 13: Youth employment in cultural occupations by province

As expected from the previous results on overall cultural occupations, Gauteng Province is where the largest proportion of youth in cultural occupations work (36.1%), followed by KwaZulu-Natal (18.5%). However, some of the more rural provinces have a surprisingly large

share of youth in cultural occupations. For example, the Eastern Cape Province has only 9.1% of cultural occupations overall, but nearly 13% of those in cultural occupations are youth. Limpopo also has a higher proportion of young cultural workers (10.7%) than cultural workers overall (9.9%). The Western Cape has 12.1% of those in cultural occupations, but only 8.5% of young cultural workers. These results show that some provinces (Gauteng, KwaZulu-Natal, Eastern Cape and Limpopo) are those with the highest proportion of young people in creative occupations, and may offer more opportunities for cultural employment in this age group than other places.

7. The Cultural Trident: CCI Employment in South Africa

Results for CCI occupations showed that 2.65% of jobs in South Africa in 2016 are cultural occupations, which occur in both cultural industries (for example, an actor in a performing arts company) and in non-cultural industries (such as a designer in a car manufacturing firm). This is an increase from 2015, which showed that 2.52% of jobs were in cultural occupations. However, if one only counts those in cultural occupations, people who work in the cultural industries doing support (non-cultural) jobs, are left out and the size of the cultural and creative industries may be under-estimated. A useful model for demonstrating this effect is the “Cultural Trident” which distinguishes between:

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

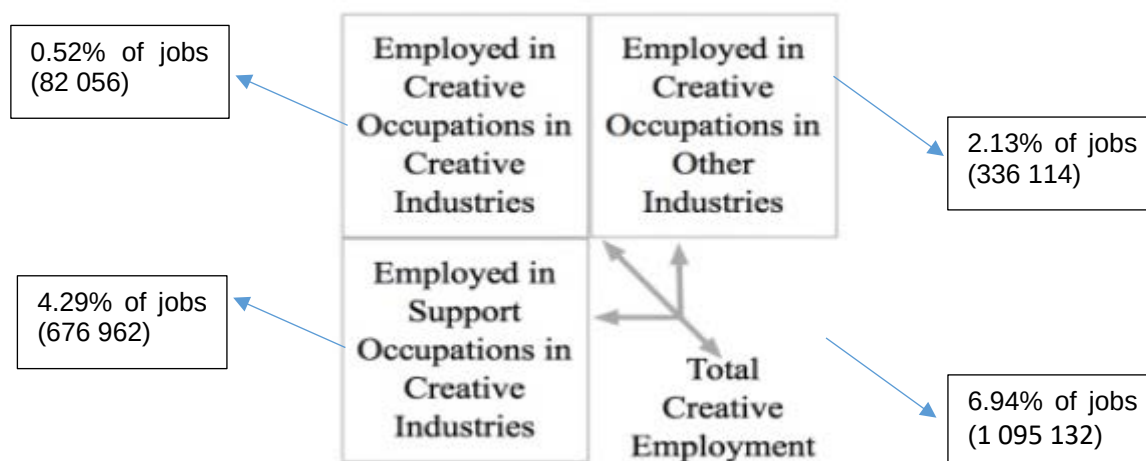


Figure 14: The Cultural Trident in South Africa

Figure 13 and Table 8 show that many cultural jobs in South Africa are based in the non-cultural industries (such as the example of the designer working in a car manufacturing industry) – 2.13% (336 000 jobs). This is an interesting finding, as it suggests that many cultural and creative occupations actually occur in non-cultural industries, which means that cultural workers are often embedded in non-cultural firms, even if their job or occupation is classified as creative. Relatively few cultural jobs occur in cultural industries – 0.52% (82 000 jobs). This supports the finding of research in other countries, which found that counting only cultural jobs in cultural industries will greatly underestimate cultural employment.

Results (Table 8) also show that 4.81% of jobs (759 000) in South Africa are in a firm that is part of the cultural industries. This includes people working in a cultural occupations (for example, a film director working in a film company) – 0.52% of all jobs - as well as the “support occupations” (for example, an accountant working in a film company) – 4.29% of all jobs¹.

If one includes all three parts of the creative trident, total cultural/creative employment in South Africa accounted for 6.94% of all jobs in the country (1, 1 million jobs) in 2016. While it is emphasised that, for the cultural industries estimate, the figure should be treated as a rough estimate, rather than an exact number (because of the lack of industry data at 4-digit level), the

¹ Some might find the significant number of non-cultural workers in the cultural industries (support occupations) surprising. Given that those employed in cultural jobs have a higher education level than the general labour force, it is not unrealistic that each cultural job gives rise to a significant number of “support jobs”. This is very much in line with the employment multipliers calculated by the National Treasury (Budget Review, 2017), which show a high ratio of job creation for those with secondary schooling or less (unskilled or semi-skilled) to job creation for those with post-school qualifications (skilled jobs) for many sectors. On average, a R1m increase in output creates 1.19 skilled jobs and 2.23 unskilled or semi-skilled jobs. However, it may also be that the lack of detailed industry data in the LFS resulted in an over-estimation of the size of the cultural industries.

results nevertheless show that the cultural and creative sector in South Africa makes a significant contribution to employment and that it has grown since 2015.

Table 8: Cultural Trident as Percentages of total employment

	Percentage of total employment		Number of jobs	
	2015	2016	2015	2016
A. Cultural occupations in Cultural Industries	0.48%	0.52%	75 209	82 056
B. Cultural occupations in Non-Cultural Industries	2.04%	2.13%	321 464	336 114
C. Non-Cultural occupations in Cultural Industries	4.20%	4.29%	661 340	676 962
Cultural occupations (A + B)	2.52%	2.65%	396 673	418 170
Cultural industries employment (A + C)	4.68%	4.81%	736 550	759 018
The Creative Economy (A + B + C)	6.72%	6.94%	1 058 014	1 095 132

As discussed earlier, youth (under the age of 35) make up 34.6% of all those employed in cultural occupations. Assuming that this proportion of young also applies to the cultural industries, this means that the cultural economy accounts for nearly 380 000 jobs for young people in South Africa.

Table 9: Youth Employment in the Cultural Economy

Cultural Trident as Percentages of total employment	% of total employment	Number of jobs	Number of Youth Jobs
A. Cultural occupations in Cultural Industries	0.52%	82 056	28 391
B. Cultural occupations in Non-Cultural Industries	2.13%	336 114	116 295
C. Non-Cultural occupations in Cultural Industries	4.29%	676 962	234 229
Cultural occupations (A + B)	2.65%	418 170	144 687
Cultural industries employment (A + C)	4.81%	759 018	262 620
The Creative Economy (A + B + C)	6.94%	1 095 132	378 916

8. Changes in Cultural Occupations over time

As also found in other countries, cultural employment is more volatile than non-cultural sector jobs. For example, as a response to the 2008/9 financial crisis and the resultant fall in economic

growth, employment in both cultural and non-cultural sectors declined, but non-cultural employment declined by 2%, while cultural employment declined by nearly 18%.

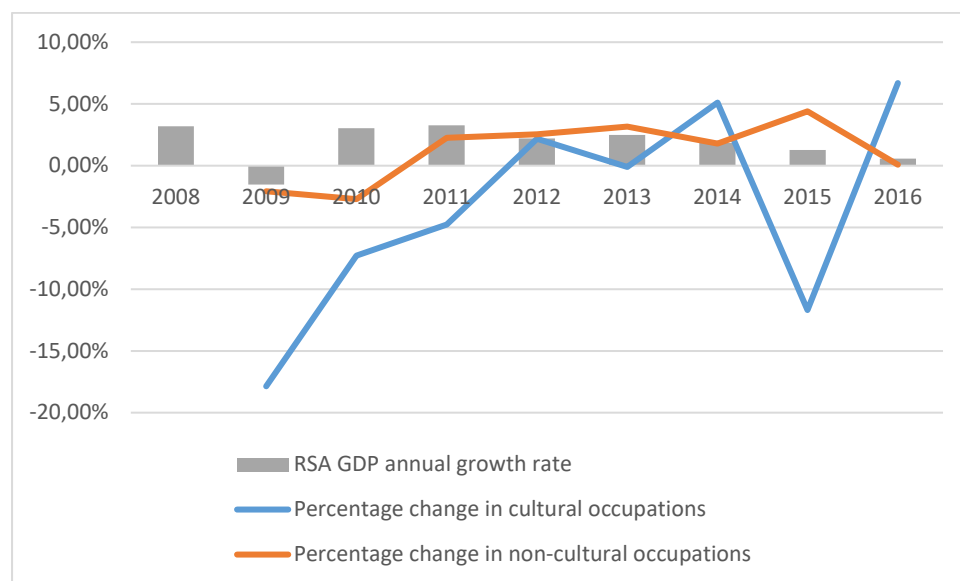


Figure 15: Changes in Cultural Occupations and GDP over time (2008 – 2016)

Similarly, in response to the slow-down of GDP growth rates in 2015, cultural employment declined sharply, even though there was positive growth in the number of non-cultural jobs. However, 2016 saw a sharp increase in people working in cultural occupations with a growth rate of 6.68%, which is much faster than job growth in other sectors.

Table 10: Changes in Cultural Occupations and GDP over time (2008 – 2016)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Percentage change in cultural occupations		-17.86%	-7.28%	-4.76%	2.17%	-0.11%	5.11%	-11.68%	6.68%
Percentage change in non-cultural occupations		-2.06%	-2.71%	2.27%	2.53%	3.15%	1.79%	4.40%	0.08%
RSA GDP annual growth rate	3.19%	-1.54%	3.04%	3.28%	2.21%	2.49%	1.85%	1.28%	0.57%

9. Concluding Comments and Policy Implications

In 2016, creative economy jobs accounted for 6.94% of all the jobs in South Africa. This included those in cultural or creative occupations (2.13%) and support jobs in the cultural and creative industries (4.81%). Of these jobs, 35% were held by the youth, which equates to nearly 379 000 youth jobs in the sector.

The study thus shows that cultural jobs offer a way out of unemployment for young people in South Africa, and that youth in cultural occupations are, on average, earning more than youth in non-cultural occupations. The jobs may be “precarious”, that is, more likely to be in the informal sector than non-cultural jobs, and sensitive to the economic climate, but they also provide flexibility and access to networks in the sector that can help to develop their skills and earnings potential.

The data also shows that the youth in cultural occupations are more racially representative, or transformed, than older workers in cultural occupations. The implication is that, over time, the CCIs will transform, but only if young people can be attracted to the sector, and see it as a sustainable career option. International research has shown that young people are more likely to stay in the sector if they do not have to take on a second job to survive, can work in a relevant cultural industry, and do not suffer long periods of unemployment.

Policies to support youth in the sector at the start of their careers could thus be very important in improving and sustaining transformation. Support could be directly financial, but could also include paid internships, mentorships, training in business skills and how to protect and exploit their intellectual property. Limited-term income support for young people from working class backgrounds could reduce the need for them to have to earn income by taking on jobs outside their cultural occupation while trying to become established, thus helping them to start a sustainable creative career.

Although women make up 41% of people in cultural occupations, there is a very worrying lack of young women in cultural occupations (29.2%) compared to young men in cultural occupations (38.4%). This pattern has been commented on in previous reports – the data shows that it is a pattern sustained over time. Although more research is needed to explain this pattern, the NFVF report (2018) showed that, in the film and TV sector, many women struggle with issues of workplace harassment, lack of representation in leadership positions, and difficulty in networking within a male-dominated industry. The NFVF (2018) report made some

recommendations aimed at improving networking and communication for women in film (which could also apply to women in other cultural domains), such as: developing a national database of female film makers, the establishment of an intergovernmental working committee, and improving information dissemination about support that does exist for female film makers. Other domains also need to explore the possible reasons for the under-representation of women, especially young women, and craft specific policies to address this. In the same way as Broad-Based Black Economic Empowerment legislations has linked public funding to transformation, specific funding for women, especially in leadership or ownership positions, and especially facilitating capacity building, could be considered.

The most popular youth domains are Visual Arts and Crafts, Design and Creative Services, and Intangible Cultural Heritage. Provinces with the largest shares of youth in cultural occupations include those with large metropolitan areas (Gauteng and KwaZulu-Natal) and more rural provinces (Eastern Cape and Limpopo).

According to the PwC Entertainment and Media Outlook 2018-2022 Report (2018), much of the growth in the Entertainment and Media sector is happening in the online space. In 2017, data consumption via smartphones was more than fixed line data consumption in South Africa, which has 43 million smartphone connections. In 2020, overall digital spending on entertainment and media is expected to overtake non-digital spending. While this change will result in challenges for the traditional methods of cultural production, the 4th Industrial Revolution, with new modes of content production and distribution via multiple digital platforms, represents a great opportunity for digitally connected youth to participate in the CCIs. In particular, new technologies can help to reduce production costs, and increased connectivity enables collaboration and resource sharing. The knowledge economy is hungry for content, and the CCIs are well placed to provide it. However, to unlock the potential of the sector to create sustainable jobs, access to good quality education and technology will be key.

In terms of policy implications, a great deal more attention needs to be paid to how the 4th Industrial Revolution will affect the CCIs, and ways in which this can be supported. The Revised White Paper for Arts and Culture (2017, 4th draft) only mentions it specifically once, to acknowledge that it provides an opportunity to content creators (Revised White Paper, 2017:13).

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Appendix 1: Defining cultural occupations in South Africa

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

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

- The SA system includes LFS code 3479 “Art, entertainment and sports associate professionals not elsewhere classified (n.e.c)”. Strictly speaking, sport is a “related” domain in the UNESCO Framework for Cultural Statistics (2009) and no other country includes it in cultural employment. However, UNESCO does include 3435 “Other artistic and cultural associate professionals”, and “Art, entertainment and sport associate professional n.e.c”, which overlap with LFS category 3479. The inclusion of sports associate professionals may lead to an over-statement of cultural employment in this category compared to the UNESCO system.
- The SA LFS does not differentiate between higher education professionals enough to allow identification of cultural occupations. However, some kinds of education and educational professionals are classified as part of cultural employment by UNESCO (for example, language, music and art teachers). Based on the weightings suggested by UNESCO for countries using ISCO-88 4 digit codes, the SA system weights LFS category 2310 (“Technikon, teacher training, technical and other colleges, university and other higher education institution teaching professionals”) at 2.5% and LFS category 2390 (“Other education professionals n.e.c.”) at 20%.
- The UNESCO system includes “Web and multimedia developers”, weighted at 5%. There is no comparable category in the LFS. To overcome this difficulty, two categories are included: LFS category 2132, “computer programmers” and LFS category 2131 “computer system designers and analysts”, both weighted at 5% as suggested by UNESCO. Note that there is little international agreement on what parts of the IT sector

should be included in cultural employment, and how they should be weighted, with the UK including almost the whole sector unweighted, while the US includes very little of it.

- The UNESCO system includes “Traditional and complementary medical professionals”. In the SA LFS there is no exact comparison, so LFS categories 3241, “traditional medical practitioners” and 3242 “faith healers” were included instead. The LFS also does not have a comparable category to 2230 “traditional and complementary medicine associate professionals” either, which are included in the UNESCO system.
- The UNESCO system includes 3431 “photographers”, but the LFS includes “Photographers and image recoding equipment operators” in one category (3131). This inclusion may lead to an over-statement of cultural employment in this category compared to the UNESCO system.
- The LFS does not allow for the identification of chefs, which are probably included in the general, much larger category of “cooks” (5122). In the absence of any weighting guidelines, we exclude this category. This omission may be an under-estimation of cultural employment compared to UNESCO.
- Although the UNESCO system does not include 7490 “Other craft and related trades workers n.e.c”, this group is judged important for South Africa, as it includes, amongst others, handicraft workers and beading, so it was included.
- The LFS does not have the following occupational categories, which are included in the UNESCO system:
 - o 1349 “Professional service managers n.e.c. (weighted at 5%)”
 - o 3433 “Gallery, library and museum technicians (all included)”
 - o 7316 “Sign writers, decorative painters, engravers and etchers (all included)”.

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

group. Thus, the more digits there are, the more detailed the occupational classification becomes².

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

4-digit code	Description	Weighting
111. LEGISLATORS		
1130.	Traditional chiefs and heads of villages	100%
123. OTHER MANAGERS/DEPARTMENT MANAGERS		
1234.	Advertising and public relations managers/department managers	100%
213. COMPUTING PROFESSIONALS		
2131.	Computer systems designers and analysts	5%
2132.	Computer programmers	5%
214. ARCHITECTS, ENGINEERS AND RELATED PROFESSIONALS		
2141.	Architects, town and traffic planners	100%
2148.	Land surveyors, Cartographers and other surveyors	100%
231. COLLEGE, UNIVERSITY AND HIGHER EDUCATION INSTITUTIONS TEACHING PROFESSIONALS		
2310.	Technikon, teacher training, technical and other colleges, university and other higher education institutions teaching professionals	2.5%
243. ARCHIVISTS, LIBRARIANS AND RELATED INFORMATION PROFESSIONALS		
2431.	Archivists and curators	100%
2432.	Librarians and related information professionals	100%
244. SOCIAL SCIENCE AND RELATED PROFESSIONALS		
2442.	Sociologists, anthropologists and related professionals	100%
2444.	Philologists, translators and interpreters	100%
245. WRITERS AND CREATIVE OR PERFORMING ARTISTS		
2451.	Authors, journalists and other writers	100%
2452.	Sculptors, painters and related artists	100%
2453.	Composers, musicians and singers	100%
2454.	Choreographers and dancers	100%
2455.	Film, stage and related actors and directors	100%
246. RELIGIOUS PROFESSIONALS		
2460.	Religious professionals	100%
311. NATURAL AND ENGINEERING SCIENCE TECHNICIANS		
3118.	Draughtspersons	100%
313. OPTICAL AND ELECTRONIC EQUIPMENT OPERATORS		
3131.	Photographers and image recoding equipment operators	100%
324. TRADITIONAL MEDICINE PRACTITIONERS AND FAITH HEALERS		
3241.	Traditional medicine practitioners	100%
3242.	Faith healers	100%
347. ARTISTIC, ENTERTAINMENT AND SPORTS ASSOCIATE PROFESSIONALS		
3471.	Decorators and commercial designers	100%
3472.	Radio, television and other announcers	100%
3473.	Street, nightclub and related musicians, singers and dancers	100%

² See Appendix 1 for classification by UNESCO (FCS, 2009) Cultural Domain

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

(Source: SASCO, 2001).

Appendix 2: Identification and Weighting of Cultural Industries

Like occupations, industries are classified by UNESCO as cultural and non-cultural. The cultural industries include all persons holding a job in a company that is involved in a cultural activity. According to the 2009 UNESCO Framework for Cultural Statistics (FCS), the set of industries is classified/defined following the International Standard Industrial Classification Revision 4 (ISIC REV.4). We have mapped the UNESCO classifications to the system currently used in South Africa: SA-SIC-5-1993. However, data is only available at three digit code level, and four digit level is needed in order to apply the detailed UNESCO framework. For some areas (like education), five digit codes would be ideal.

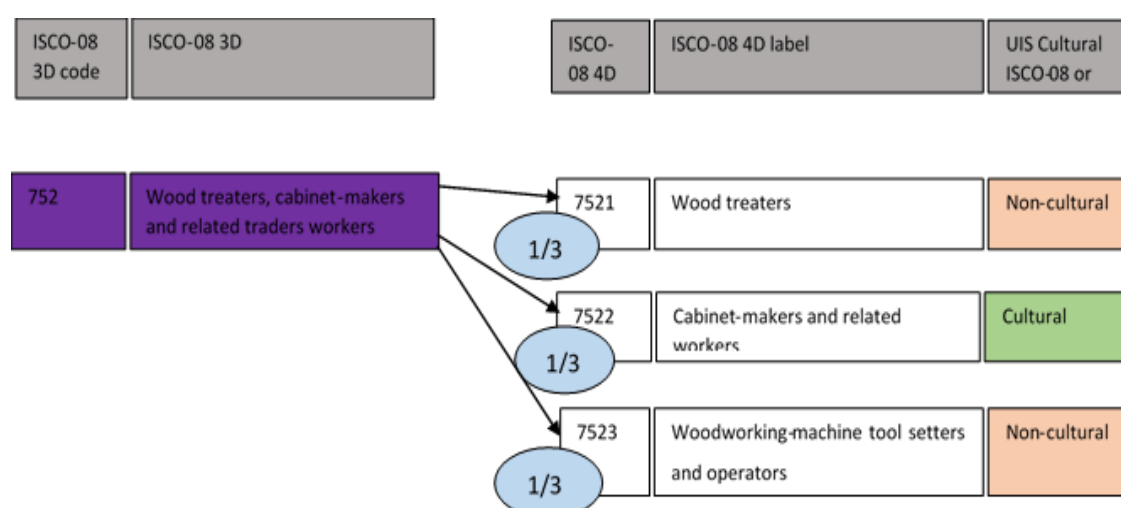
Identification and Weighting of South African Cultural industries

Code	Description	Partial code	Weighting
324.	Publishing	NO	100%
376.	Manufacture of watches and clocks	YES	15%
392.	Manufacturing n.e.c	YES	40%
613.	Wholesale trade in household goods	YES	50%
623.	Other retail trade in new goods in specialised stores	YES	40%
624.	Retail trade in second – hand goods in stores	YES	5%
853.	Renting of personal and households goods	YES	50%
862.	Software consultancy and supply	YES	5%
864.	Data base activities	YES	50%
882.	Architectural, engineering and other technical activities	YES	50%
883.	Advertising	YES	5%
889.	Business activities n.e.c	YES	16.6%
920.	Education services	YES (EDU)	0.005%
961.	Motion picture, radio, television and other entertainment activities	NO	100%
962.	News Agency Activities	NO	100%
963.	Library, archives, museums and other cultural activities	NO	100%

However, the UNESCO Manual (2015) does provide some guidance on how to estimate cultural industries employment if only three digit codes are available (see figure below). If no secondary data is available, the method of estimating the weightings for partial codes is very rough, with the main assumption being that each sub-group has the same size (in terms of employment).

For example,

- **392. Manufacturing n.e.c:** This is designated a partially cultural sector, but no coefficient was provided. The coefficient was estimated by counting the total number of sub-groups (5), the number of those that were cultural (2) compared to non-cultural (3), and deriving the weighting (2/5 or 40%) in this way.
- **376. Manufacture of watches and clocks:** The partial coefficient provided by UNESCO was used (15%).
- **613. Wholesale trade in household goods:** This major group contains two sub-groups of 4 digit, one of which is non-cultural and the partial coefficient was not provided, so using the UNESCO estimation method, it is weighted 50%;
- **623. Other retail trade in new goods in specialized stores:** contain five sub-groups of 4 digit, three of which are non-cultural, and two of which are cultural. The partial coefficient was not provided, so using the UNESCO weighting method, it is weighted 40% (2/5).
- **882. Architectural, engineering and other technical activities:** contain one sub-group of 4 digits, which is a non-cultural sub-group and the partial coefficient was not provided, so it is weighted 50%.



Example of weighting estimation for partially cultural industries

(UNESCO Manual, 2015:21)

However, the UNESCO Manual does provide weightings for 3-digit ISIC codes for ISIC Rev 3.1 3D, which has some similarities to the system currently being used by South Africa, as well as ISCO-88 3D, which also has some classifications similar (but to a lesser extent) to what South Africa is currently using.

The weightings used for estimating employment by industry are a combination of the suggested weightings produced by UNESCO and, where no other guidance was available, the method explained in the figure above. The exceptions are:

- **853. Renting of personal and household goods n.e.c:** This is a partial cultural code which UNESCO does not provide weightings for, but also does not have the necessary sub-group to apply the UNESCO weighting system. In the South African system, this major group includes 20 listed items, about half of which are cultural, or have cultural components, such as “renting of video tapes and records; journals and magazines; books; scenery and costumes; video machines, television sets; musical instruments; jewellery; and textiles” (SA-SIC-5-1993:158). Following the rough UNESCO weighting system, we thus weight this sector at 50%.
- **889. Business Activities n.e.c.:** UNESCO does provide a weighting of 25%, but in the SA-SIC-5-1993 system that South Africa is currently using, only one of the six sub-groups is clearly related to the cultural sector (8894. Photographic activities). Since this is a very large major group with the potential to significantly skew the results, a conservative weighting of 16.6% (1/6) was used.
- **920. Education Services:** In the South African SIC system, it is not possible to identify different levels of education. For ISIC Rev 3.1 3D, UNESCO suggests a weighting of 5% for the categories “8030 Higher Education” and “8090 Other education”, thus completely excluding basic education. Using Department of Higher Education statistics on post school education and training and Department of Basic Education statistics for school statistics, it was calculated that employment in the Post-school sector makes up approximately 10% of employment in the whole education sector. (While it is acknowledged that this refers to employment, rather than to the industry, in the absence of any other data, employment numbers are used as a proxy for the size of the sector.) Using the UNESCO weighting for education, 5% of the 10% of total education amounts to a weighting of 0.005% for total education, which is what was used based on the data in the table below:

Post-School Education & Training 2015	Total number of people employed.
Educators	18566
Admin	27786
Service	4958
TOTAL	51310
Basic Education 2014	Total number of educators employed
Educators Public Schools	390608
Educators Independent Schools	34482
Other	23015
TOTAL	448105
TOTAL Education	499415
Percentage Post-School	10%
5% of Post-School	0.005

(Sources: DHET (2017) "Statistics on Post School Education and Training in South Africa 2015"; Dept. of Basic Education (2016) "Education Statistics in South Africa 2014")

Lack of data also means that some industries, classified as 100% cultural by UNESCO, could not be included because the data category was not present in the LFS dataset. For example, "8720 Research and experimental development on social sciences and humanities" which excludes education and marketing research, and definitely has cultural components ("This group includes systematic creative work done in social sciences and humanities") could not be included, and its exclusion may be leading to an under-estimation of the size of the CCIs.

While this system provides a *rough estimate* of the size of employment (both cultural and non-cultural) in the CCIs in South Africa, it is far from ideal. For a more accurate measure of the real extent of cultural industry employment, industry data at 4-digit level (and 5-digit level for education) is needed.