

Employment in the Cultural and Creative Industries in South Africa

SERGE HADISI[±] AND JEN SNOWBALL^{*}

[±] Political Economy Southern Africa (PESA), Pretoria, South Africa, 0082

Email: sergehadisi@yahoo.fr

^{*} Rhodes University, PO Box 94, Makhanda, South Africa, 6140 /
South African Cultural Observatory

Email: j.snowball@ru.ac.za

Abstract

The Cultural and Creative Industries (CCIs) are increasingly attracting attention worldwide as important contributors to economic growth, innovation and job creation. The latter is particularly important in South Africa, which has very high unemployment rates. Studies in other countries have shown that the CCIs can grow faster than the rest of the economy, and that this section of the labour market may be more diverse and open to participation by people from a wide range of socio-economic backgrounds. However, this has not always been found to be the case. Using data from the Statistics South Africa Labour Market Dynamics South Africa (2008 – 2015), this is the first South African study to use the UNESCO classifications to define cultural employment. The analysis investigates the question of diversity and transformation in the CCIs, as well as the growth rate in cultural employment compared to other occupations. Results show that cultural and creative occupations contribute significantly to employment in South Africa, making up 2.5% of total employment in 2015. However, compared to non-cultural jobs, more jobs in the cultural sector are in the informal sector, and there are also significantly more freelance (or “own account”) workers. informality, urban economics would be well served to also look at other schools of thought for inspiration combined with the voices of those involved in this form of living.

Keywords: Cultural and Creative Industries; Employment; South Africa.

1. Introduction

The Cultural and Creative Industries (CCIs) are increasingly attracting 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). Their findings showed that the CCIs employ 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 has very high unemployment rates.

The potential of the CCIs has been recognised in some African countries: The East African Community CCI Bill (2015) recognised the sector as, “one of the fastest growing sectors in the global economy” with the potential to increase GDP and increase employment in both developed and developing countries. An exploratory study of the CCI sector in Nigeria (Kwanashie *et al.*, 2010) concluded that, “In Nigeria, although statistics are not available, it is estimated that millions of Nigerians are engaged in some form of creative jobs that when organized could boost the Creative Economy”. Work on national policies to promote the cultural sector in Senegal was funded under the Millennium Development Goals Achievement Fund (2008 – 2012) to develop institutions and train cultural sector workers in areas such as copyright law, and to market and develop cultural venues and cultural tourism.

In South Africa there has also been a shift from seeing the cultural sector as “the subsidised arts” to regarding it as a viable sector for investment. The 1996 White Paper on Arts, Culture and Heritage focused primarily on what Bonet and Negrier (2018) describe as “Cultural Democratisation”, which emphasises broad access for audiences, cultural education, and “excellence for all”. However, from about 2008, with the publication of a research report entitled “The Creative Industries in South Africa”, there was a policy change. The new White Paper (2017) places far more emphasis on the role of the CCIs in contributing to job creation and economic growth.

Despite this, there have been few studies of employment in the CCIs in South Africa using officially collected, national-level data, although there have been attempts to measure the size of the creative economy using survey data (for example, regional studies such as the Western Cape (2008) and Gauteng (2008) studies, and a national study conducted in 2014 by Plus94 on behalf of the Department of Arts and Culture (DAC, 2014). However, these studies have some constraints: (i) since the population of CCIs is not known, there is always

a concern that the sample is not representative, thus reducing the reliability of the results; (ii) since the surveys are expensive, they are not conducted at regular intervals and thus do not allow for comparisons over time; and (iii) they exclude those working in cultural occupations, but not in CCIs (such as a designer in the automotive industry).

Another challenge is that the definition of “cultural occupations” used by various studies is not always the same. This paper uses the UNESCO Framework for Cultural Statistics (2009) to define cultural occupations, which includes those sectors that are traditionally thought of as cultural (such as music, film, theatre, books and publishing, fine art, etc.) as well as the more commercial, or applied sectors (such as architecture, advertising, and design). Overall, cultural and creative employment includes those working in such cultural occupations both in, and outside of cultural firms (such as a designer working in a car manufacturing firm), as well as support occupations (such as an accountant working in a film company).

An important question to address is how open (or meritocratic) the CCIs are. Although they were initially expected to be open and diverse, studies in developed countries (Oakley, 2006; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O’Brien *et al.*, 2016) have tended to find that cultural occupations are mostly occupied by middle class, white people. These findings have implications for CCI job creation potential, and also for the kinds of arts and culture that are produced.

Based on work done for the South African Cultural Observatory, this article uses national data from Statistics South Africa to measure the size and make-up of CCI employment in the country, as well as to determine the demographic composition, type of employment, and changes in cultural employment over time.

2. Cultural and creative employment: A review of literature

One of the first studies of employment in the CCIs using official national statistics (as compared to surveys) was done using the 2014 British Labour Force Survey (Department for Culture, Media and Sport, 2015). They found that 1.9 million people are working in creative occupations in the UK, which made up 6.1% of total jobs. Like some other studies, they found evidence that creative employment tended to “cluster” in some sectors, particularly around large cities. For example, 28.9% of creative jobs were found in London, while only 16.4% of all jobs were based in this region.

A Brazilian study (Kon, 2016), using national data, found that the creative sector accounted for 5% of “industry jobs” in the country. This study defined the CCIs quite broadly, also including sports, and information technology, architecture and engineering. Creative workers employed just over a million people in Brazil in 2010, which amounted to 3.1% of formal employment in the country. However, when household surveys were used to estimate informal employment in the CCIs (defined as self-employed, and workers in companies, but without a formal contract), a further 988 049 workers were identified.

Some researchers (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O’Brien *et al.*, 2016) have noted that, although the cultural and creative industries (CCIs) were originally seen as open to all, with successful participation based on talent, this has not, in fact, been found in most research. For example, previous studies done in the UK and US have shown that workers in the CCIs have actually tended to be from middle class, affluent backgrounds, and are mostly dominated by white people (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O’Brien *et al.*, 2016). These findings have implications for CCI job creation potential, and also for the kinds of arts and culture that are produced.

Based on the 2014 UK survey, O’Brien *et al.* (2016) rejected the view of the cultural and creative sector as “open and meritocratic”. Instead, they find that, in the UK, those from working class backgrounds are under-represented and generally have lower wages than those from privileged classes. However, they also find that there are significant differences between the various CCI sectors: so, for example, the craft sector is much more “open” than sectors like publishing and music.

There are a number of reasons why the CCIs might not be as open and meritocratic as they were first assumed to be, mostly to do with the short-term, contract nature of work in some CCI sectors (Oakley, 2006; Grugulis and Stoyanova, 2012; Grodach and Seman, 2013). For example, in the film sector, teams of people, representing the specific skills required for a specific project, are assembled over fairly short timeframes. When the project is over, the team disbands. Caves (2000) argues that this method of production is an important way to offset the risk associated with creative ventures, where demand is volatile and uncertain. In this situation, firms that employed people on full-time, permanent contracts would go bankrupt if too few projects came in, and would not have the necessary flexibility needed to source people with the specific skills required for particular projects.

However, one of the results of this method of production is that social networks (also referred to as social capital) are of great importance to being employed in the CCIs. Given the short timeframe of most creative projects, teams are often made up of artists already known to each other, or who have been recommended by someone known to the team, or who already have a reputation for good work in the industry. Grugulis and Stoyanova (2012) and Eikhof and Warhurst (2013) argue that these recruiting practices make sense given the tight production schedules of many cultural and creative projects. However, this makes it very difficult for new artists to break into the industry, and middle-class people, who tend to have more social capital, have a better chance of success (Eikhof and Warhurst, 2013; Siebert and Wilson, 2013).

Short-term, project-based work also results in unpredictable employment patterns and incomes. Those who can rely on their parents or families to support them during periods when they are not employed are likely to stay in the industry longer, and are thus more likely to develop the necessary networks and reputation. Again, people from middle-class backgrounds have the advantage (Eikhof and Warhurst, 2013; Siebert and Wilson, 2013).

Short-term contracts also mean that on-the-job training is limited, since there is seldom time or incentive for such interventions. In some CCI sectors, one can enter the industry by working as an unpaid volunteer to build up the social capital and experience needed. However, this is only possible if the resources are available to support the person during this time, again giving those from more affluent backgrounds the advantage (Siebert and Wilson, 2013).

Eikhof and Warhurst (2013) comment on the long and erratic working hours for those employed in the CCIs, which also sometimes involves travel. These working conditions can be particularly difficult for women, who are often the primary caregivers in family life. Oakley (2013) agrees, suggesting that, far from the discourse of cultural work as “good” work, the reality is that working conditions are often characterised by long hours, insecurity and lack of access to training. While some occupations in the CCIs are well-represented by labour unions in the UK (such as journalism, broadcasting, and acting), most others are not, offering little protection from the “often exploitative employment practices” in the CCIs.

Eikhof and Warhurst (2013) developed a model to show how the nature of production in the CCIs is translated into persistent social inequality. Their argument is that the model of production (characterised by project-based work,

high risk and high sunk costs) leads to project-based employment (with high employment insecurity, reliance on social capital, and long, erratic working hours). This, in turn, leads to employment insecurity. The difficulty of breaking into the industry without social capital and networks, and with uncertain earnings, which all perpetuates social inequality, with the sector being dominated by people from middle class backgrounds, and with more men than women being employed in the industry serve to reinforce the negative sustainability of this type of employment.

3. Defining the CCIs and cultural occupations

There is still much debate about what constitutes the CCIs internationally, and in Africa (Joshua and Omotoso, 2016; De Beukelaer, 2017). The East African CCI Bill (2015) for example, includes traditional or “core” CCIs, such as visual arts, music and performing arts, but also the more commercial sectors, such as the design industry, advertising and architecture, as is becoming increasingly common internationally.

In 2009, UNESCO published a Framework for Cultural Statistics that attempted to produce an internationally recognized definition of culture, and allocated the CCIs into various Domains. According to UNESCO (2009: 9): “Culture is the set of distinctive spiritual, material, intellectual and emotional features of society or a social group that encompasses, not only art and literature, but lifestyles, ways of living together, value systems, traditions and beliefs.”

The UNESCO Framework defines 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. For example, music spans the domains of ‘Performance and Celebration’ and ‘Audio-visual and Interactive Media’ as it consists of both live performance and recorded music, but for the purposes of the Framework, it is placed in a single category, ‘Performance and Celebration’. 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.

To date, South Africa does not have a generally recognised definition of the CCIs, but most policy and discussion documents seem to be moving towards adopting the UNESCO system. As in many countries, South Africa has broadened its definition of the CCIs over time, with early reports, like the Cultural Industries Growth Strategy, defining the cultural industries very narrowly to including

only the music, film and video, publishing and craft sectors. The defining characteristic, following the UNESCO definition at the time, was the symbolic nature of the goods and services produced. The Gauteng (2008) and Western Cape (2008) mapping studies, produced a decade later, defined the ‘creative economy’ as including both the core cultural sector (producing work with symbolic meaning, such as art, performance, music and literature) as well as the more commercial creative industries (producing work protected by copyright, such as design, advertising and architecture) (See SACO, 2016 *Towards the Development of a Framework for Cultural Statistics in South Africa*, for further discussion).

The UNESCO (2009) Framework points out that cultural workers may be found in cultural industries, but also in other industries where cultural work is done (or undertaken). In fact, research by Higgs and Cunningham (2008) shows that studies which only take into account people working in the creative industries could be underestimating people working in cultural occupations by up to 40%. A popular 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).

The approach can also be used to the valuing of the annual income generated by each of these groups of workers and to track changes in CCI workforce composition over time.

While the UNESCO Framework (2009) argues that both cultural industries and cultural occupations should be included, Grodach and Seman (2013) argue that employment data should be focused on cultural occupations rather than industries. This is because cultural workers may hold more than one job, or may be self-employed and work on a contract basis across a range of industries. Recent studies of employment in the CCIs, such as that of Grodach and Seman (2013) in the US, and O’Brien *et al.* (2016) for the UK, have thus tended to use occupational, rather than industry classifications. While there are similarities, even where guided by the UNESCO (2009) Framework, each country is likely

to choose somewhat different occupational classifications, based on the level of detail in their available data, but also on their particular areas of interest.

The UK study (2015) explains three different ways of understanding the CCIs:

- The Creative Economy, which includes those employed in creative occupations inside and outside the creative sector, as well as those in non-cultural jobs in creative sector firms;
- The Creative Industries, which is a sub-set of the creative economy, focusing on cultural and non-cultural workers, but only those employed in CCIs (as was done in, for example, the 2014 South African mapping study);
- Creative Occupations, which is a sub-set of the creative economy that focuses on cultural work both in, and outside of, cultural firms (Department for Culture Media and Sport, 2015).

This study measures all three parts of the Creative Trident.

4. Research methods

The first phase of this research aimed to examine the UNESCO definition of cultural occupations and to determine to what extent South African national data collection methods used by Statistics South Africa could be used to match this definition, and possible adaptations needed. (For more discussion see Hadisi and Snowball, 2016, *Measuring Cultural Employment in South Africa: A comparison between the UNESCO Guidelines and the South African Standard Occupational and Industrial Classification Codes*).

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. Hadisi and Snowball (2016) conclude that 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. Appendix Table 1 shows those occupational categories in the LFS that were classified as “cultural employment” in this study.

Currently, the South African Labour Force Survey (LFS) uses a coding system for occupations and industries based on SASCO-2001 and SA-SIC-5-1993. Officially, South Africa uses the South African Standard Classification of Occupations, 2nd edition, 2012 (SASCO-2012) and the Standard Industrial Classification, 7th edition, 2012, (SA-SIC-7-2012), but this does not seem to have been applied yet to the LFS data.

For industry classifications, a major constraining factor was that even once the UNESCO classifications had been mapped to the system currently used in South Africa (SA-SIC-5-1993), identification of cultural industries was not possible, because the available data is at the three-digit code level, and a four-digit level is needed. However, the UNESCO manual offers a way of estimating the employment contribution of cultural industries using three-digit SIC codes, which is what was used in this research. (A full technical discussion of the classification system used can be found in the SACO (2018) CCI Mapping Study, available on the Cultural Observatory's website.)

4.1. The South African Labour Market Dynamics dataset

The Quarterly Labour Force Survey (QLFS) and the Labour Market Dynamics of South Africa report (LMDSA) are produced by Statistics South Africa. 2015 marks the eighth 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 2015 provides information on Labour market trends over the period of 2008 – 2015, from the Quarterly Labour Force Survey (QLFS) panel data. The panel data facilitates the tracking of individuals on a quarterly basis (e.g., movement of individuals into employment, as well as identifying trends in sectors, industries, occupations, and provinces). In addition, Statistics South Africa has produced an annual dataset based on all four QFLS datasets. In another word, the QFLS represents a dataset for each of the 4 quarters of the year of 2015, and the LMDSA is the combination of the four quarterly datasets from the QLFS to form an annual dataset on which the Labour Market Dynamics in South Africa report is based (QLFS guide, August, 2008: 1-2; QLFS metadata, quarter 4, 2014: 1-2; LMDSA metadata, 2014: 1-2).

The sample used in the QFLS is designed to be representative at the provincial level and even within provinces at the metro and non-metro level. The survey covers the entire national population aged 15 years and over. The QFLS contains a sample size of roughly 30 000 dwellings per quarter. It is divided equally into four subgroups or panels called rotation groups (e.g., 7500 dwellings per rotation group). It should be noted that, for the 2015 LMDSA, the sample was changed. Until 2014, the sample was based on information collected during the 2001 population census. It covered 30 000 dwellings distributed across 80 787 enumeration areas. In 2015, the master sample was updated and is now based on the Census 2011 results. The master sample was increased by 8% so

that it now covers 33 000 dwellings. It enables more accurate identification of sub-groups (especially within metropolitan areas and in the mining sector), and adjusts for population movement between provinces (Statistics South Africa, 2014 and 2015).

The change in the master sample in 2015 may have an impact on the comparison of results relating to employment in the CCIs over time. While still comparable with data from previous years, it may be that sudden changes are partly the result of the sample change.

5. Results and discussion

The results of this research are broadly divided into two sections: A detailed cross-sectional analysis of cultural and creative occupations in 2015 (the latest data available at the time of the research); and a discussion of changes in cultural and creative employment over time, from 2008 to 2015.

5.1. The size of cultural and creative employment

The Labour Force Dynamics South Africa annual dataset (LMDSA) for 2015 had 197 426 observations (or interviews). Of the people surveyed, about 58% were classed economically active, made up of the employed (38.53%), unemployed, using the narrow definition (13.64%), or discouraged work seekers (6.01%). The remaining 42% were not economically active. The sample size for those who were classed as employed was 76 064 (LMDSA annual dataset, 2015). Using the definition of cultural occupations discussed above, 2.52% of employed South Africans (1894 observations) were identified as being employed in cultural occupations. To put the figure into context, the results show that those working in cultural occupations (both in the CCIs and in cultural occupations in non-CCI industries) accounts for slightly fewer jobs in South Africa than the mining sector (2.89% of total employment in 2015), and just under half as many as agriculture (5.59% in 2015).

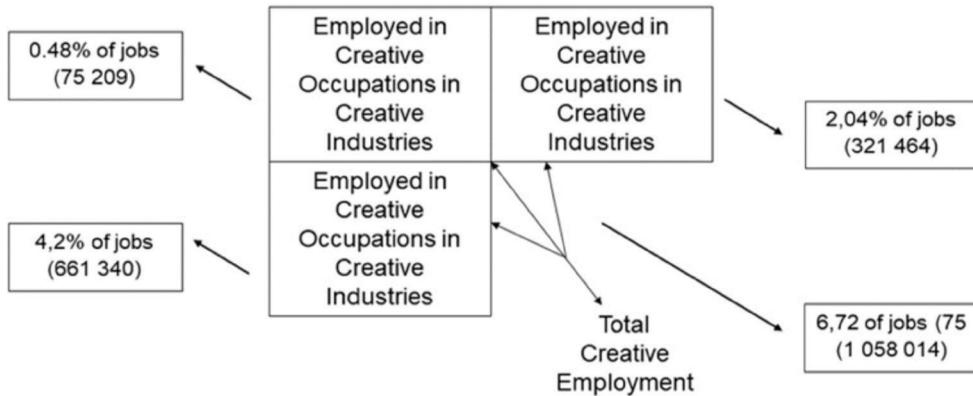
The Creative Trident analysis (Figure 1) shows that many cultural jobs in South Africa are based in the non-cultural industries (such as the example of the designer working in a car manufacturing industry) – 2.04% (321 000 jobs). This is an interesting finding, as it suggests that many cultural and creative 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 – 0.48% (75 000 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 also show that 4.68% of jobs in South Africa are in a firm that is part of the cultural industries. This includes people working in a cultural occupation (for example, a film director working in a film company) – 0.48% of all jobs – as well as the “support occupations” (for example, an accountant working in a film company) – 4.2% of all jobs.

If one includes all three parts of the creative trident (the Creative Economy), the sector accounted for 6.72% of all jobs in the country, or just over a million jobs, in 2015. While it is emphasised that, for the cultural industries, the figure should be treated as a rough estimate, rather than an exact number (because of the lack of industry data at 4-digit level¹), the results nevertheless show that the creative economy in South Africa makes a significant contribution to employment.

FIGURE 1: THE CULTURAL TRIDENT IN SOUTH AFRICA



Source: Cultural Trident from Higgs and Cunningham, 2008; Data from Statistics South Africa; Authors’ own calculations.

¹ It should be noted that, while data for cultural occupations from the LFS is fairly detailed and precise, South Africa currently on has industry data at the 3-digit level. UNESCO provides guidance on how to estimate the size of the cultural industries, even where 4-digit industry codes are not available, which is what was used here to determine the “Employment in Support Occupations in the Creative Industries”.

TABLE 1: SOUTH AFRICAN CREATIVE ECONOMY EMPLOYMENT IN CONTEXT

Country	Percentage of persons employed in creative economy	Year (if not 2015)
Mexico	9.95	
Russian Federation	7.60	2014
Germany	7.09	
Malta	6.72	
South Africa	6.72	
Chile	5.80	2013
Spain	4.55	
Thailand	4.53	
China	4.16	
Uganda	2.53	2012
Mozambique	1.69	2014

Source: UNESCO International Database, 2018; Author’s own calculations for South Africa.

An international comparison with countries who also applied the UNESCO definition of total creative employment (that is, employment in all three parts of the creative trident) shows that South Africa has the same proportion of creative economy employment as Malta, is above some developing countries like Chile, Thailand, China and Uganda, but below others, such as Mexico, Russia and Germany.

The UNESCO classification framework also enables one to identify cultural occupations by Domain in Figure 2. In terms of employment, by far the largest domain is Visual Arts and Crafts (Domain C), which accounts for 53% of creative and cultural jobs. This is followed by Books, Information and Press (Domain D) and Design and Creative Services (Domain F), which account for 19% each of cultural employment. Much smaller contributions from Performance and Celebration (6%), Audio-visual and Interactive Media (3%), and Cultural and Natural Heritage (1%) follow these three large domains. A school of thought in cultural employment studies, started by Florida’s (2002) *Rise of the Creative Class*, is that cultural and creative sector firms and workers tend to “cluster” or group, usually around larger cities. The Labour Force data in South Africa allows one to examine the proportion of cultural occupations by province.

FIGURE 2: POSITION OF CULTURAL AND NATURAL HERITAGE DOMAIN IN THE UNESCO FRAMEWORK FOR CULTURAL STATISTICS (2009:4)

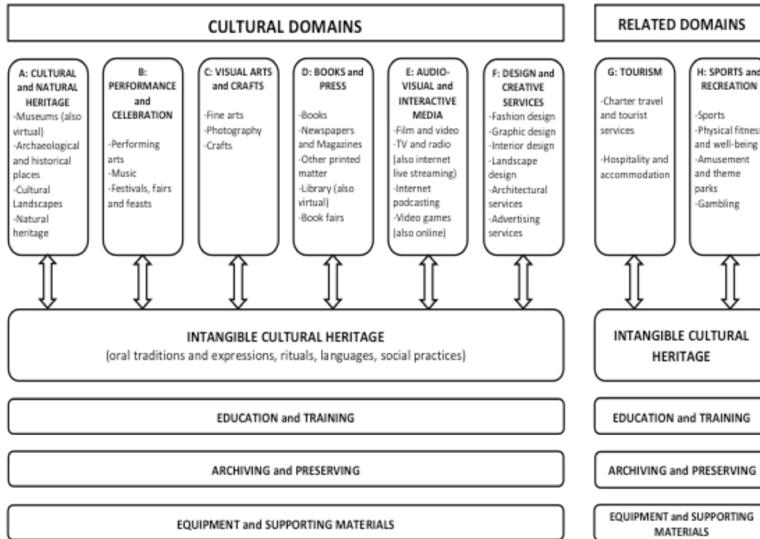


TABLE 2: PROPORTION OF CULTURAL AND NON-CULTURAL OCCUPATIONS BY PROVINCE

Province	Cultural employment (%)	Number of cultural jobs	Non-cultural employment (%)	Total employment (%)
Gauteng	36.99	146 729	31.50	31.64
Western Cape	15.05	59 699	14.63	14.64
Mpumalanga	7.62	30 226	7.51	7.51
KZN	15.52	61 564	16.23	16.22
Limpopo	7.83	31 059	8.25	8.24
Free State	4.54	18 009	5.13	5.12
North West	4.91	19 477	5.97	5.94
Eastern Cape	6.74	26 736	8.79	8.74
Northern Cape	0.79	3 134	1.97	1.94

Source: LMDSA annual dataset, 2015; Authors’ own percentage calculations.

What the results show is that the provinces with the largest metropolitan areas (Gauteng, KwaZulu-Natal and the Western Cape) are also those with the highest proportion of cultural occupations in South Africa. For both Gauteng and the Western Cape, the proportion of cultural occupations is larger than the proportion of jobs overall, which would tend to support the findings in other countries that cultural workers tend to cluster in particular areas, especially those with large cities.

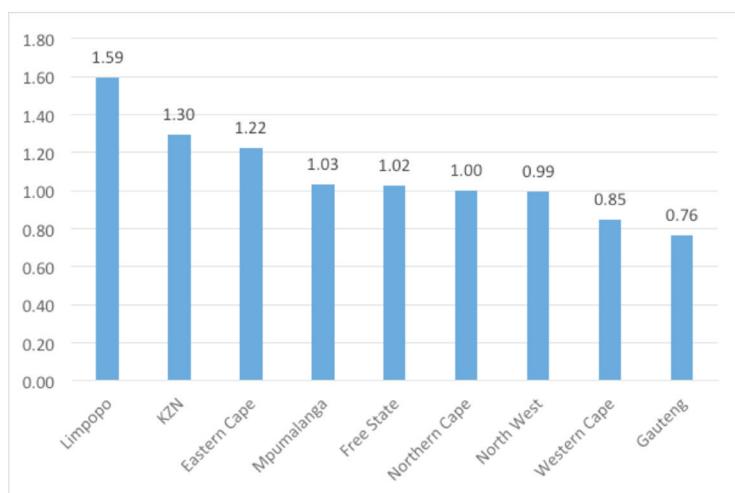
Location quotients can be used to identify clusters within specific domains within the cultural sector, where sufficient data is available. For example,

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

Where X = cultural jobs in the specific domain in the Province; Y = cultural jobs in the specific domain in the country; X' = all cultural 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 in that domain compared to other provinces. It may be that, even if a specific province does not have a comparative advantage in overall cultural employment, it may nevertheless have a cluster relating to a specific cultural domain.

Domain C in the UNESCO (2009) Framework for Cultural Statistics, “Visual Arts and Crafts”, includes Fine Art, Photography and Crafts, and accounted for 53% of cultural occupations in South Africa in 2015. As shown in Figure 3, the three provinces with LQs for the Visual Arts and Crafts domain that are significantly bigger than one are Limpopo (1.59), KwaZulu-Natal (1.30), and the Eastern Cape (1.22). Two other provinces (Mpumalanga and the Free State) have LQs very slightly above one.

FIGURE 3: PROVINCIAL LOCATION QUOTIENTS FOR VISUAL ARTS AND CRAFTS (DOMAIN C)



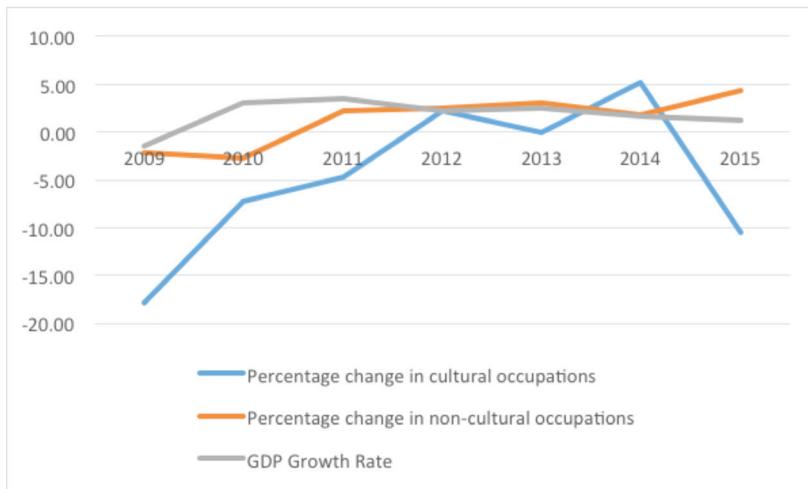
What this means is that, while Limpopo does not have a comparative advantage in CCI employment overall (only 7.83% of all cultural jobs in SA are found in Limpopo), it does have a potential advantage in Domain C cultural jobs (12.48% of all jobs in Domain C are found in Limpopo). This is also the case for KwaZulu-Natal, which has 15.5% of all cultural jobs, but 20.1% of all Domain

C cultural jobs. In the case of the Eastern Cape: while only 6.74% of all cultural jobs are found in the EC, 8.24% of all Domain C jobs are found in the province.

Although the data does not allow one to examine every domain in this way for every province because of small sample sizes, some clusters can be identified where a particular province has the majority share of cultural employment in a particular domain. For example, Gauteng has the highest percentage of CCI jobs overall, as well as in Books, Information and Press (35%), Audio Visual and Interactive Media (63%), and Design and Creative Services (50%). The Western Cape has the third highest percentage of cultural jobs overall, and also significant clusters in Books, Information and Press (14%), Audio Visual and Interactive Media (18%), and Design and Creative Services (27.5%). Such analysis can be important for the effective design of regional cultural policies that wish to build on existing comparative advantage.

One of the great advantages of using national-level data is that it allows a comparison of cultural and non-cultural employment over time. Since the LFS has been running in its current form since 2008, an analysis of data over the time period 2008 – 2015 is shown in Figure 4.

FIGURE 4: PERCENTAGE CHANGE IN CULTURAL AND NON-CULTURAL EMPLOYMENT AND GDP GROWTH, 2008 – 2015



Source: LMDSA annual datasets, 2008-2015; Statistics South Africa (GDP growth rates); Authors' own percentage calculations.

Figure 4 shows that, as found in other countries as well, 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%. Similarly, in response to the slow-down of GDP growth rates in 2015, cultural employment declined sharply, even though there was a small positive growth in the number of non-cultural jobs. As the South African Reserve Bank comments: "Real gross domestic production moderated further ... to a disappointing 1,3 per cent in 2015 – with the exception of 2009, the slowest rate of expansion during the past 17 years" (SARB Quarterly Bulletin, March 2016).

While some caution needs to be exercised when comparing the 2015 results with those from previous years because of the change in the LMDSA master sample, the report on international trade in CCI goods and services (Cattaneo and Snowball, 2017) also shows that 2015 was a year in which both import and export of cultural and creative goods declined significantly (exports fell by 16% while imports fell by 25% compared to 2014). This provides some corroborating evidence that the cultural and creative sectors were under pressure in 2015, which may account for the fall in the number of people working in creative occupations in that year.

5.2. A profile of workers in cultural occupations in South Africa

One of the important questions for the CCIs, especially in South Africa, where there is a strong transformation imperative, is their diversity. Results show that those working in cultural occupations in South Africa are somewhat less racially diverse than those in non-cultural occupations. In non-cultural occupations, 73.9% of workers are African, 10.5% are coloured, 3.1% are Indian or Asian, and 12.5% are white. In cultural occupations, the proportions of African (66.5%), coloured (8.9%) and Indian/Asian (4%) workers are mostly lower, while the percentage of white workers (20.6%) is higher.

Some Domains are less transformed than others, however, especially those requiring higher levels of education or formal qualifications. For example, Domain E (Audio Visual and Interactive Media) is 41% white (54.9% have tertiary education) and Domain F (Design & Creative Services) is 43% white (66% have tertiary education). This demonstrates that access to tertiary education may be one of the factors constraining transformation in some CCI domains in South Africa. In terms of gender, more workers in cultural occupations are men (56.8%), which is very similar to the gender distribution in non-cultural occupations (56.2%).

The age groups of those working in cultural occupations were generally older than those in non-cultural occupations (Table 3). In cultural work, the percentage of young women (up to 34) is lower than men, with 8% fewer women in this age category in cultural work than men (34.1% compared to 42%), compared to a less than 5% difference in non-cultural work (35.1% compared to 39.5%). As previous studies have pointed out, this may be because women, who generally carry the most responsibility for family caregiving, find it difficult to enter the labour market early on. This is especially the case for cultural work, which may require long and erratic working hours and travel.

TABLE 3: CULTURAL AND NON-CULTURAL EMPLOYMENT BY GENDER

Age groups	Cultural: Men	Non-Cultural: Men	Cultural: Women	Non-Cultural: Women
Up to 34	42.0%	39.5%	34.1%	35.1%
35-49	38.1%	38.7%	37.8%	40.6%
50+	19.9%	21.8%	28.1%	24.3%

Source: LMDSA annual dataset, 2015; Authors' own percentage calculations.

As found in many other studies, those working in cultural occupations tend to be better educated than those working in non-cultural occupations. This is particularly evident when comparing tertiary education: 28.2% of those working in cultural occupations have tertiary education compared to only 18.1% of those in non-cultural occupations. In terms of gender differences, a very similar proportion of men and women in cultural occupations have tertiary education, but a higher proportion of men had not completed secondary education (29.5%) compared to women (24%).

In non-cultural occupations, 65.7% of employment is formal, and less than 40% is informal. In cultural occupations, 43.3% of jobs are informal and 48.1% are formal². While some commentators have argued that informal sector work can have its advantages in terms of the flexibility of working hours, a recent Statistics South Africa (2014) survey showed that most informal businesses owners were: black Africans, who tended to have lower levels of education than those working in the formal sector, and had chosen to go into business because they were unable to secure employment in the formal sector.

² Note that the percentage of formal and informal sector workers do not add up to 100% because of a small "other" category not included in the table.

TABLE 4: TYPES OF CULTURAL WORK, EDUCATION AND EARNINGS

	Cultural Employment (%)	Non-Cultural Employment (%)
Type of Work		
Formal: All	48.1	65.7
Informal: All	43.3	29.8
Working for someone else for pay	61.4	86.0
An employer	5.5	5.2
Own account worker (no employees)	32.5	8.3
Helping without pay	0.6	0.5
Education and Salary		
Tertiary Education	28.2	18.1
R2500 or less	32.6	36.3
R2501-R6000	22.4	25.8
R6001-R16 000	20.0	17.0
R16 001-R37 500	10.9	7.4
R37 501 or more	4.0	2.9
Refused to answer	10.2	10.6

Source: LMDSA annual dataset, 2015; Authors’ own percentage calculations.

The 2013 mapping study of the CCIs in South Africa found that 22.1% of South African CCI businesses were “unregistered”, that is, operating in the informal sector. Using the database of more than 2000 interviews with CCIs that was part of the 2013 study, Snowball *et al.* (2017) constructed a transformation score, which included indicators such as ownership by a black, coloured or Indian South African, having at least one woman owner, and the proportion of black, coloured or Indian employees. Results showed a strong relationship between the transformation score and being in the informal sector (unregistered firms). Unregistered firms do not have access to public funding or formal loans, so the study suggests that one way of contributing to sustainable industry transformation could be to provide support and information to CCIs to encourage them to formally register their businesses.

When one considers the types of employment, other differences between cultural and non-cultural jobs emerge. The vast majority of those working in non-cultural jobs are “working for someone else for pay” (86%) – that is, they are employees. In cultural occupations, only 61.4% of people are employees, while nearly a third (32.5%) are “own account workers” with no employees.

Only 8.3% of non-cultural occupations fall into this category. This finding provides support for the theory that free-lance contract work is much more common in cultural than in non-cultural occupations. A greater proportion of women in cultural employment are “own account” workers (37.6%) than men (28.6%).

Given the generally higher levels of education of those working in cultural occupations, it is no surprise that earnings are generally higher compared to non-cultural occupations. A lower percentage of those working in cultural occupations fall into the bottom two income categories (R2500 or less; R2501-R6000), and a higher proportion of those working in cultural occupations fall into the higher income categories (from R6001-R16 000 onwards).

6. Concluding remarks

While there has been increasing acknowledgement of the importance of the cultural and creative industries in creating employment in both developed and developing countries, there has been surprisingly little research on cultural employment in developing countries. In South Africa, the CCIs have been acknowledged as a potential growth sector that can play an important role in job creation and transformation. The discussion around the new White Paper on Arts, Culture and Heritage (2017) also emphasises the shift from seeing the cultural sector as permanently in need of subsidy towards seeing it as a productive “industry” in need of targeted policy and investment.

While there have been various regional studies and once-off surveys of CCI employment in South Africa, this article (based on a series of reports produced for the South African Cultural Observatory) is the first national level study on CCI employment in South Africa over time using household data from the national statistical agency. The use of the UNESCO framework for the identification of cultural occupations and the cultural economy makes the results internationally comparable.

Results show that cultural and creative occupations contribute significantly to employment in South Africa, making up 2.5% of total employment in 2015 (jobs), which is slightly more than the mining sector, and about two thirds of the number of agricultural jobs. Including all parts of the cultural trident (including those in non-cultural jobs, but working in the creative industries, and those in cultural jobs, but working outside the creative industries) it is estimated that the creative economy makes up 6.7% of all employment in South Africa.

Graphical analysis of cultural employment and GDP over time (Figure 4) showed that, while cultural employment can grow faster than non-cultural employment when the economy is doing well, it is more volatile, being significantly negatively affected by economic downturns. An acknowledged limitation of the research is that the time series data available currently is not sufficient to allow causal analysis of GDP growth, cultural and non-cultural employment rates, and thus to determine if the CCIs are a potential driver (that is, a lead to) economic growth and job creation.

Compared to non-cultural jobs, more jobs in the cultural sector are in the informal sector, and there are also significantly more freelance (or “own account”) workers in cultural employment. Eighty per cent of those in cultural occupations are black African, coloured and Indian or Asian people, which is somewhat lower than in non-cultural occupations although there are large differences between cultural domains. The least transformed sectors are those with the highest levels of tertiary education, suggesting that access to higher education may be one of the factors constraining greater diversity in the sector.

As also found in other countries, cultural workers tend to have higher levels of education and earnings than non-cultural workers, suggesting that this sector has the potential to boost economic growth. However, cultural jobs tend to “cluster” in some provinces, notably those with larger cities, although regional clusters in particular types of CCIs have also been identified.

Some findings are strikingly similar to studies of cultural employment in developed country contexts, specifically the UK and USA. The results provide some evidence that cultural occupations are not as “open” (or meritocratic) as might be expected, and that specific support and/or policies to address this (such as more of a focus on accredited training and the development of career paths) may be needed to diversify participation. Similarly, the types of employment in the industry are more precarious than in non-cultural sectors, relying as they do on short-term contracts and teams organised around specific projects.

Limitations of the research are that, while data for cultural occupations from the South African Labour Market Dynamics Survey is fairly detailed and precise, South Africa currently only has industry data at the 3-digit level. UNESCO provides guidance on how to estimate the size of the cultural industries, even where 4-digit industry codes are not available, which is what was used here to determine the “Employment in Support Occupations in the Creative Industries”. It may thus be that this sector of creative economy employment is less accurate than cultural occupations data.

In designing effective and evidence-based policy for the CCIs, information on the size and composition of the sector, its diversity and the kinds of jobs it creates, as well as how it responds to the business cycle, is vital. While the sector has potential to contribute to the job creation targets of the National Development Plan, it does appear to be different from the rest of the economy and unlocking its potential will need careful and strategic interventions.

Biographical notes

Jen Snowball is a Professor of Economics at Rhodes University and a researcher in cultural economics, with a specialization in festivals and theatrical events. She has a BA in Economics, BA Honors in Classics and Economics, an MA Applied Economics and a PhD in Economics from Rhodes University. On completion of her second BA Hons she joined the Department of Economics and Economic History at Rhodes University as a Junior Lecturer, rising through the ranks to ultimately become a professor in 2014. She is also the chief research strategist at the South African Cultural Observatory.

Serge Hadisi is an economist and research associate at Political Economy Southern Africa. He has an MA in Economics from Rhodes University where he worked as a lecturer and researcher. He is also an independent consultant to South African Cultural Observatory, where he conducts research on employment in the Creative Economy.

Acknowledgement

This article is based on a research report originally commissioned by the South African Cultural Observatory, which is funded by the national Department of Sport, Arts and Culture.

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Appendix I:

Table: South African occupations that were included in the definition of 'cultural occupations'

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%
3474.	Clowns, magicians, acrobats and related associate professionals	100%
3479.	Art, entertainment and sport associate professionals not elsewhere classified	

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348. RELIGIOUS ASSOCIATE PROFESSIONALS		
3480.	Religious associate professionals	
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)	100%
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%