

Employment in the Cultural and Creative Industries in South Africa

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Acknowledgement: This research was funded by the South African Cultural Observatory, the research organisation of the Department of Arts and Culture, South Africa.

1. Introduction

The Cultural and Creative Industries (CCIs) are attracting increasing attention worldwide as potential drivers of 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 have very high unemployment rates.

The potential of the CCIs has been recognised in some African countries: The newly released East African Community CCI Bill (2015) also 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 (Agoralumier, 2009) concluded that, “In Nigeria, although statistics are not available, it is estimated that millions of Nigerians are engaged some form of creative 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 (UNESCO, 2012).

Despite this, there have been no previous 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 (2009) and Gauteng (2009) studies, and a national study conducted in (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; and (ii) since the surveys are expensive, they are not conducted at regular intervals and thus do not allow for comparisons over time.

This paper presents the first study of cultural and creative employment in South Africa using national-level data. The size of the sector, the demographics of the workers, and changes over time are discussed.

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 there are 1.9 million people 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, including also 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.

Table 1: International comparisons of cultural employment

| Country | Percentage of persons in cultural employment | Percentage of persons employed in non-cultural industries that have a cultural occupation |
|--|--|---|
| Mexico | 9.79 | 3.1 |
| Malta | 9.08 | 4.3 |
| Russian Federation | 7.6 | 4 |
| Chile | 5.8 | 3.9 |
| France | 4.38 | 1.9 |
| China, Macao Special Administrative Region | 4.23 | 1 |
| Malaysia | 3.32 | 2 |
| Mozambique | 1.69 | 1.5 |
| Ecuador | 0.82 | 0.8 |

Data from UNESCO on cultural employment (Table 1) illustrates the differences between countries, ranging from nearly 10% in Mexico to less than 1% in Ecuador. In terms of the other BRICS countries for which UNESCO provides data, Russia has 7.6% of people in cultural employment, and China has 4.23%. What Table 1 also shows is that many people in cultural employment work outside of the cultural sector. This means that focusing only on cultural employment in the cultural sector may significantly underestimate total cultural employment in an economy. For example, in Russia, of the 7.6% of people in cultural employment, 4% work in non-cultural industries.

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 time-frames. 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 time-frame 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 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 care-givers 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 “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.

3. Defining the CCIs and Cultural Occupations

The East African Community Creative and Cultural Industries Bill (2015) defines the CCIs as:

“The industries that originate from creativity or accumulation of culture which through the formation and application of intellectual properties, possess potential capacities to create wealth and job opportunities, enhance the citizens’ capacity for arts, and elevate the citizens’ living environment in the areas specified in the Schedule.”

Included in the schedule are 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.

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 doing cultural work. 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.

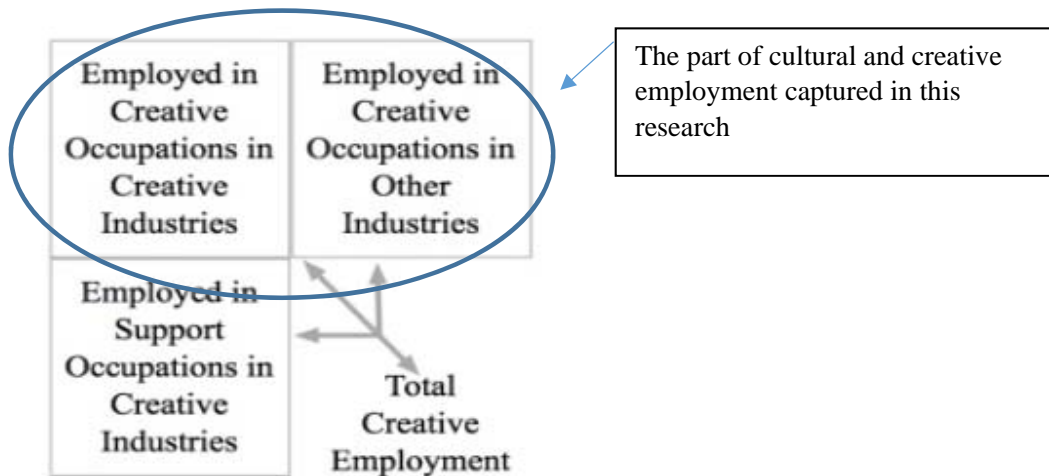


Figure 1: The Creative Trident

(Source: Higgs and Cunningham, 2008)

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, as shown in Table 2. 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:

1. 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;
2. The Creative Industries, which is a sub-set of 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);

3. Creative Occupations, which is a sub-set of the creative economy that focuses on cultural work both in, and outside of, cultural firms (which is what is recommended by Grodach and Seman (2013) and O'Brien et al. (2016) and the approach this study takes).

Table 2: Cultural sector occupation categories used in UK and US studies

| UK Cultural Sector Occupations | US Cultural Sector Occupations |
|--|--|
| Publishing | Advertising and Promotions Managers |
| Authors, writers, and translators | Architects, except naval |
| Journalists, newspaper, and periodical editors | Architects, except landscape & naval |
| Advertising and marketing | Landscape Architects |
| Public relations professionals | Archivists, Curators and Museum Technicians |
| Marketing and sales directors | Archivists |
| Advertising accounts managers, creative directors | Curators |
| Advertising and public relations directors | Museum technicians and conservators |
| Marketing associate professionals | Artists and Related Workers |
| Music, performing and visual art | Art Directors |
| Musicians | Craft Artists |
| Dancers and choreographers | Fine Artists, Including Painters, Sculptors, and illustrators |
| Actors, entertainers, and presenters | Multi-Media Artists and Animators |
| Artists | Artists and Related Workers, All Other |
| Design: product, graphic, and fashion design | Designers |
| Graphic designers | Commercial and Industrial Designers |
| Product, clothing, and related designers | Fashion Designers |
| Architecture | Floral Designers |
| Architects | Graphic Designers |
| Chartered architectural technologists | Interior Designers |
| Town planning officers | Merchandise Displayers and Window Trimmers |
| Architectural and town planning technicians | Set and Exhibit Designers |
| IT, software, and computer services | Designers, All Other |
| Web design and development professionals | Actors |
| Programmers and software development Professionals | Producers and Directors |
| IT and telecommunications directors | Dancers and Choreographers |
| IT business analysts, architects and systems designers | Dancers |
| Museums, galleries, and libraries | Choreographers |
| Archivists and curators | Musicians, Singers, and Related Workers |
| Librarians | Music Directors and Composers |
| Film, TV, video, radio, and photography | Musicians and Singers |
| Arts officers, producers, and directors | Announcers |
| Photographers, AV and broadcasting equipment operators | Radio & television announcers |
| Crafts | Public address system & other announcers |
| Smiths and forge workers | News Analysts, Reporters & Correspondents |
| Glass and ceramics makers, decorators, and finishers | Broadcast News Analysts |
| Furniture makers and other craft woodworkers | Reporters and Correspondents |
| Other skilled trades | Public Relations Specialists |
| Weavers and knitters | Editors |
| Sources: US classifications from Grodach and Seman (2013); UK classifications from O'Brien et al. (2016) | Sound Engineering Technicians |
| | Photographers |
| | Television, Video, and Motion Picture Camera Operators and Editors |
| | Camera Operators, Television, Video, and |
| | Motion Picture |
| | Film and Video Editors |
| | Miscellaneous Media and Communication Equipment Workers |
| | Chefs & Head Cooks |
| | Motion Picture Projectionists |
| | Jewellers and Precious Stone & Metal Workers |

4. Research Methods

Defining cultural occupations in South Africa

The first phase of this research was 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. 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. Appendix Table 1 shows those occupational categories in the LFS that were classified as “cultural employment” in this study.

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. 2014 marks the seventh year of publication of the South African Labour Market Dynamics report, since that the Quarterly Labour Force Survey (QFLS) has been initiated and redesigned in 2008. The Labour market Dynamics South Africa (LMDSA) report of 2014 provides information on Labour market trends over the period of 2008 – 2014, from the Quarterly Labour Force Survey (QLFS) panel data. The panel data facilitate 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 have produced an annual dataset based on all four QFLS datasets. In another words, the QFLS represents a dataset for each of the 4 quarters of the year of 2014, 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 QLFS is designed to be representative at provincial level and even within provinces at metro and non-metro level. The survey covers the entire national population aged 15 years and over. The QLFS contains a sample size of roughly 30 000 dwellings per quarter. It is divided equally into four subgroup or panel called rotation groups (e.g., 7500 dwellings per rotation group). The data sample is based on information collected during the 2001 population Census conducted by Statistics South Africa.

The Labour Force Dynamics South Africa annual dataset (LMDSA) for 2014 had 234 253 observations (or interviews). Of the people surveyed, about 55% were classed economically active, made up of the employed (36.17%), unemployed, using the narrow definition (12.45%), or discouraged work seekers (6.36%). The remaining 45% were not economically active. The total sample size for those who were classed as employed was 84721 (LMDSA annual dataset, 2014).

5. Results

The results of this research are broadly divided into two sections: A detailed cross-sectional analysis of cultural and creative occupations in 2014 (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 2014.

The size of cultural and creative employment

Using the definition of cultural occupations previously discussed, 2.93% of employed South Africans (2480 observations) were identified as being culturally employed. The Labour Market Dynamics Survey reports total employment in South Africa for 2014 as 15.146 million. The CCIs, making up 2.93% of this, amounts to 443 778 jobs.

Table 3: Cultural occupations as a percentage of all occupations

| Occupation category | Observations | Percentage |
|-----------------------------------|--------------|------------|
| Cultural occupations | 2480 | 2.93% |
| Non – cultural occupations | 82241 | 97.07% |
| Total | 84721 | 100% |

(Source: LMDSA annual dataset, 2014. Authors' own calculations)

To give an indication of the relative size of employment creation in the CCIs, results are compared to employment (number of jobs) by industry in South Africa (LMDSA report, 2014).

Those working in cultural occupations (both in the CCIs and in cultural occupations in non-CCI industries) account for slightly more jobs in South Africa than the mining sector (2.83% of employment), and about two-thirds as many as agriculture (4.63% of employment). Another way of expressing this is that, in 2014, 1 in every 34 jobs in South Africa was cultural or creative. While this is very much in line with what has been found in other countries, it was still a surprising result for South Africa, which has traditionally been seen as focused on primary industries (mining and agriculture) and more recently, tertiary industries such as finance and business services (which made up 13.4% of jobs in 2014).

Table 4: Employment by Industry in South Africa, 2014

| Employment in SA by Industry | Percentage of Jobs | Number of Jobs (Thousand) |
|--|--------------------|---------------------------|
| Total | | 15146 |
| Agriculture | 4.63% | 702 |
| Mining | 2.83% | 428 |
| Manufacturing | 11.62% | 1760 |
| Utilities | 0.77% | 117 |
| Construction | 8.25% | 1249 |
| Trade | 21.14% | 3202 |
| Transport | 6.15% | 932 |
| Finance & Business Services | 13.40% | 2030 |
| Community & Social Services | 23.06% | 3493 |
| Private households | 8.12% | 1230 |

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

A profile of workers in cultural occupations in South Africa

As outlined in the literature, one of the important questions for the CCIs is their diversity. Finding showed that those working in cultural occupations in South Africa are somewhat less racially diverse than those in non-cultural occupations. In non-cultural occupations, 71.4% of workers are African, 14.3% are coloured, 2.9% are Indian or Asian, and 11.4% are white. In cultural occupations, the proportions of African (66.9%), coloured (11.9%) and Indian/Asian (2.2%) workers are somewhat lower, while the percentage of white workers (19%) is higher.

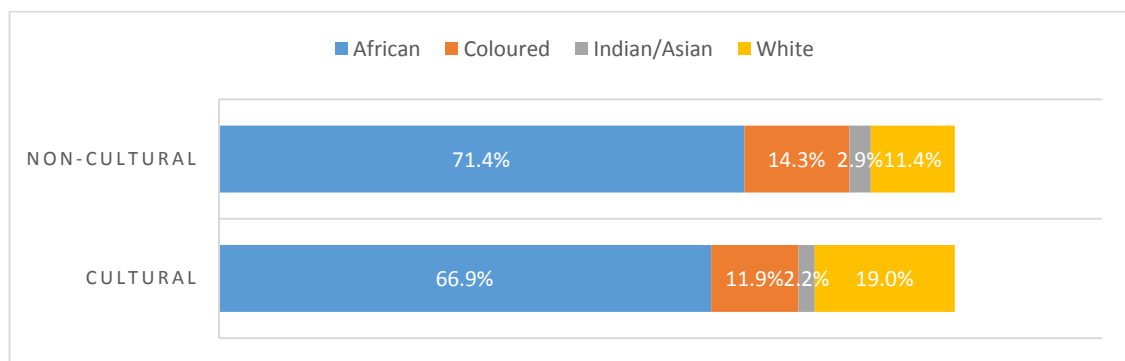


Figure 2: A comparison of race groups employed in cultural and non-cultural occupations

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

Further analysis showed that some sectors of the CCIs are less racially diverse than others, especially those requiring formal, technical qualifications. For example, if one analyses Advertising and public relations managers, Computer system designers, analysts and programmers, Architects, town planners and Cartographers as a group, 41% of workers in these occupations are white, which is considerably above cultural occupations as a whole (19%), and 78% are men (compared to 51.7% men for cultural occupations as whole).

In terms of gender, slightly more workers in cultural occupations are men (51.7%), but this is still lower than in non-cultural occupations, where men make up 52.5% of employed persons. However, there is evidence of gender bias in terms of the earnings and types of work that men and women do in both cultural and non-cultural occupations. For example, while more people working in cultural occupations have tertiary education (28.5%)

compared to those in non-cultural occupations (18.3%), 31.1% of men in cultural occupations have tertiary education, compared to only 25.8% of women. Similarly, while a higher percentage of people work in the informal sector in cultural occupations than in non-cultural occupations (47.3% compared to 29.1%), a greater percentage of women (50.5%) in cultural occupations work in the informal sector than men (44.3%).

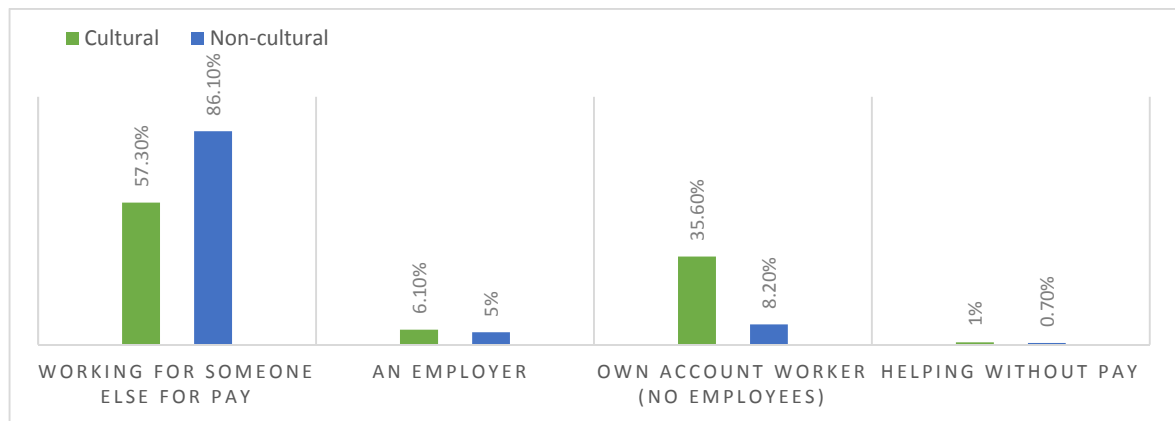


Figure 3: Types of employment in cultural and non-cultural occupations

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)

When one considers the types of employment, large differences between the cultural and non-cultural sectors emerge. The vast majority of those working in non-cultural jobs are “working for someone else for pay” (86.1%) – that is, they are employees. In cultural occupations, only 57.3% of people are employees, while more than a third (35.6%) are “own account workers” with no employees. Only 8.2% of non-cultural occupations fall into this category. This finding provides support for the theory that free-lance work is much more common in cultural than in non-cultural occupations.

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) than for non-cultural employment. This finding is also similar to what was found in the UK.

A school of thought in cultural employment studies, started by Florida's (2002) *Rise of the Creative Class*, is that cultural and creative sector workers tend to "cluster" or group, usually around larger cities. The Labour Force data in South Africa allows one to examine the types of occupation by province, although the sample size is too small to draw firm conclusions at city level.

What the results show is that the two wealthiest provinces (Gauteng and the Western Cape) with the two largest South African cities (Johannesburg and Cape Town) are also those with the highest proportion of cultural occupations in South Africa. In fact, in both cases, their proportion of cultural occupations is larger than the proportion of jobs overall. For example, 19.5% of all employment in South Africa is found in Gauteng, but 21% of all South African cultural occupations are found in this province. The same goes for the Western Cape: 17% of total jobs, but 19% of cultural and creative occupations. This suggests that cultural and creative occupations do tend to concentrate in areas with large cities, as also found in other studies.

Table 5: Proportion of cultural and non-cultural occupations by Province

| Province | Number of Cultural jobs | Proportion of Cultural occupations in SA | Proportion of Non-Cultural occupations in SA | Proportion of Total jobs in SA |
|----------------------|-------------------------|--|--|--------------------------------|
| Gauteng | 93 193 | 21.0% | 19.4% | 19.5% |
| Western Cape | 84 318 | 19.0% | 17.0% | 17.0% |
| KZN | 61 242 | 13.8% | 15.0% | 15.1% |
| Limpopo | 55 472 | 12.5% | 9.0% | 9.2% |
| Mpumalanga | 46 153 | 10.4% | 9.3% | 9.3% |
| Eastern Cape | 34 171 | 7.7% | 9.3% | 9.2% |
| Free State | 29 733 | 6.7% | 8.6% | 8.5% |
| North West | 22 189 | 5.0% | 7.1% | 7.0% |
| Northern Cape | 17 307 | 3.9% | 5.3% | 5.2% |

(Source: LMDSA annual dataset, 2014. Authors' own percentage calculations)¹

Cultural Employment over time

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

¹ Note: total includes "other industry".

current form since 2008, an analysis of data over the time period 2008 – 2014 is shown below. While the short time period does not allow for more sophisticated statistical analysis, some preliminary conclusions can be drawn.

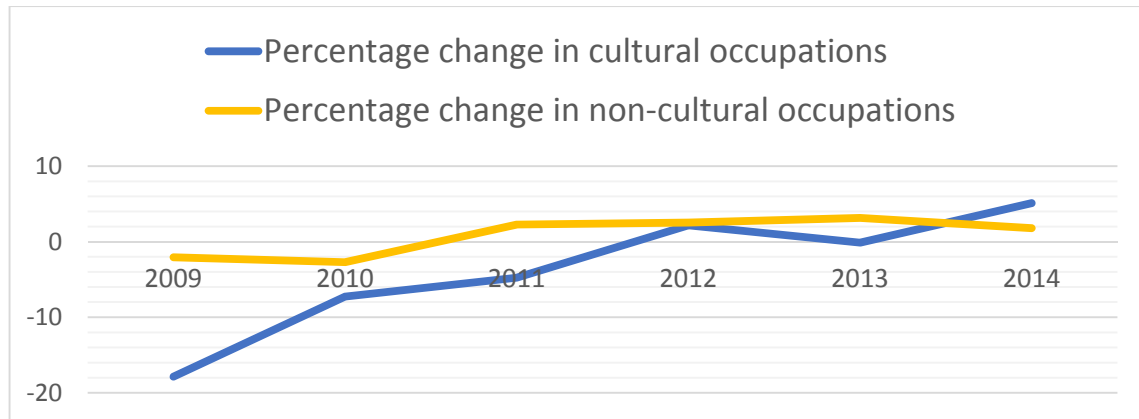


Figure 4: Percentage change in cultural and non-cultural employment 2008 – 2014

(Source: LMDSA annual datasets, 2008-2014. Authors' own percentage calculations)

As 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 decline, but non-cultural employment declined by about 2%, while cultural employment declined by nearly 18%. However, once the economy starts to recover, cultural employment grows quickly and, in 2014, cultural employment grew at a faster rate than non-cultural employment.

Time-series data also allows one to compare changes in the demographics of those working in cultural occupations. The percentage of black African, coloured and Indian or Asian people employed in cultural occupations in South Africa has remained relatively stable over time, but is also a lower percentage than in non-cultural occupations. This supports the theory (Oakley, 2006, 2013; Eikhof and Warhurst, 2013; Siebert and Wilson, 2013; O'Brien et al., 2016) that the CCIs can be difficult to break into. Similarly, the percentage of women in cultural occupations is fairly stable over time, but has dropped by 5% since the 2008/9 crisis.

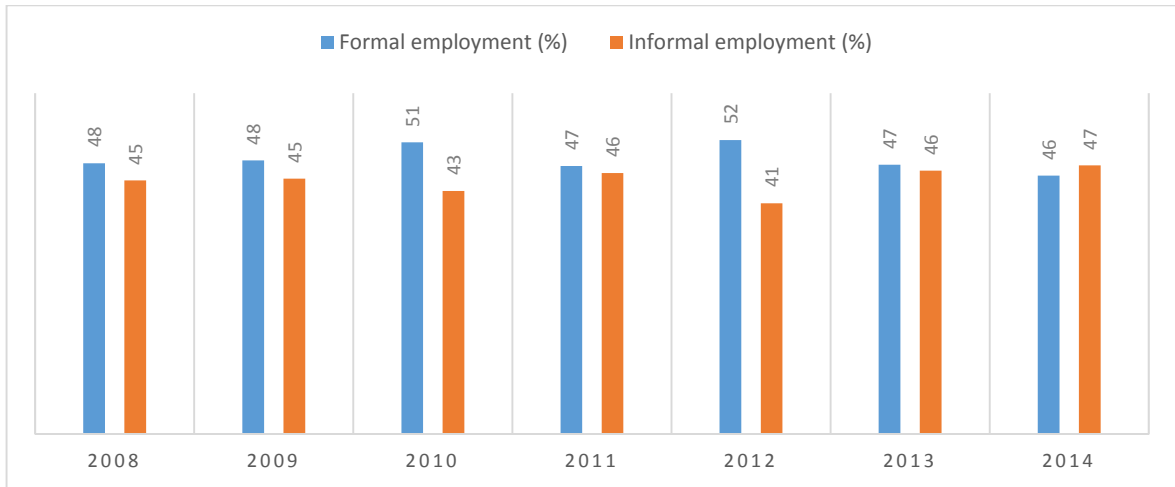


Figure 5: Formal and Informal employment in cultural occupations 2008-2014

(Source: LMDSA annual datasets, 2008-2014. Authors' own percentage calculations)

An analysis of the types of employment in cultural occupations over time, shows that for most of the time series (2008-2013) formal sector employment made up a greater percentage of cultural jobs than informal sector employment. However, formal sector employment declines from 2012 onwards, while informal sector cultural jobs grow, until, in 2014, the informal sector makes up a greater percentage of jobs than the formal sector. At the same time (Figure 13), the percentage of people in cultural employment who work as an employee for someone else declines, and the percentage of "own account" workers (freelance) increases.

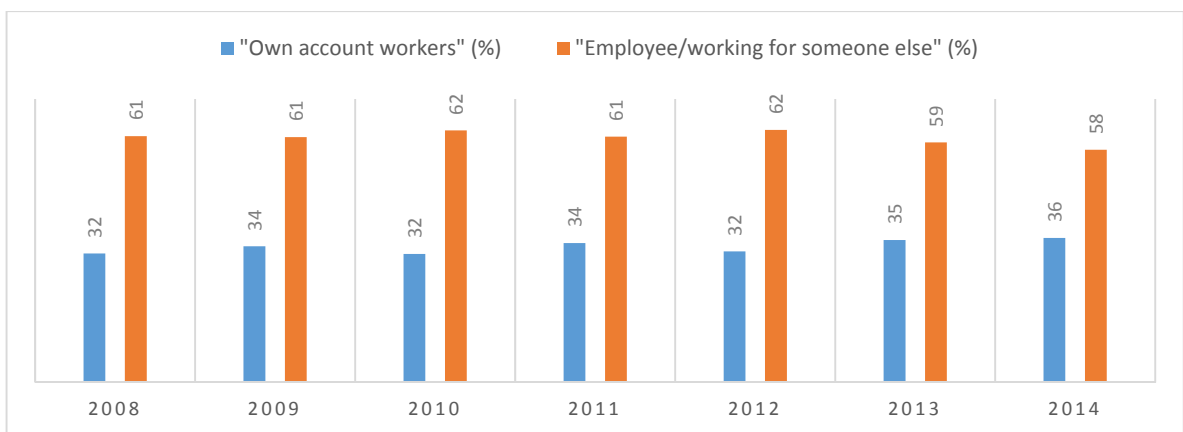


Figure 6: Changes in the types of cultural jobs 2008 – 2014

(Source: LMDSA annual datasets, 2008-2014. Authors' own percentage calculations)

What the time-series analysis shows is that cultural occupations can grow faster than non-cultural sector employment, but that cultural occupations are volatile and very sensitive to economic downturns, such as the 2008/9 crisis. However, cultural employment is also adaptable, in that there is some movement between formal and informal sectors, and between types of employment over time. However, it should be noted that a time series of only seven years is not really long enough to draw robust conclusions on longer term trends.

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. Using household data from the national statistical agency, this study presents the first time series results on cultural employment in South Africa.

Results show that cultural and creative occupations contribute significantly to employment in South Africa, making up 2.93% of total employment in 2014 (443 778 jobs), which is slightly more than the mining sector, and about two thirds of the number of agricultural jobs. Time series analysis shows that, while cultural employment can grow faster than non-cultural employment, it is more volatile, being significantly affected by economic downturns.

Compared to non-cultural jobs, more jobs in the cultural sector are in the informal sector, especially for women. There are also significantly more freelance (or “own account”) workers in cultural employment. The percentage of black African, coloured and Indian or Asian people employed in cultural occupations is somewhat lower (81% in 2014) than in non-cultural occupations (89%), although there are large differences between cultural domains.

As also found in other studies, 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.

These 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.

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Appendix Table 1: 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% |
| 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).