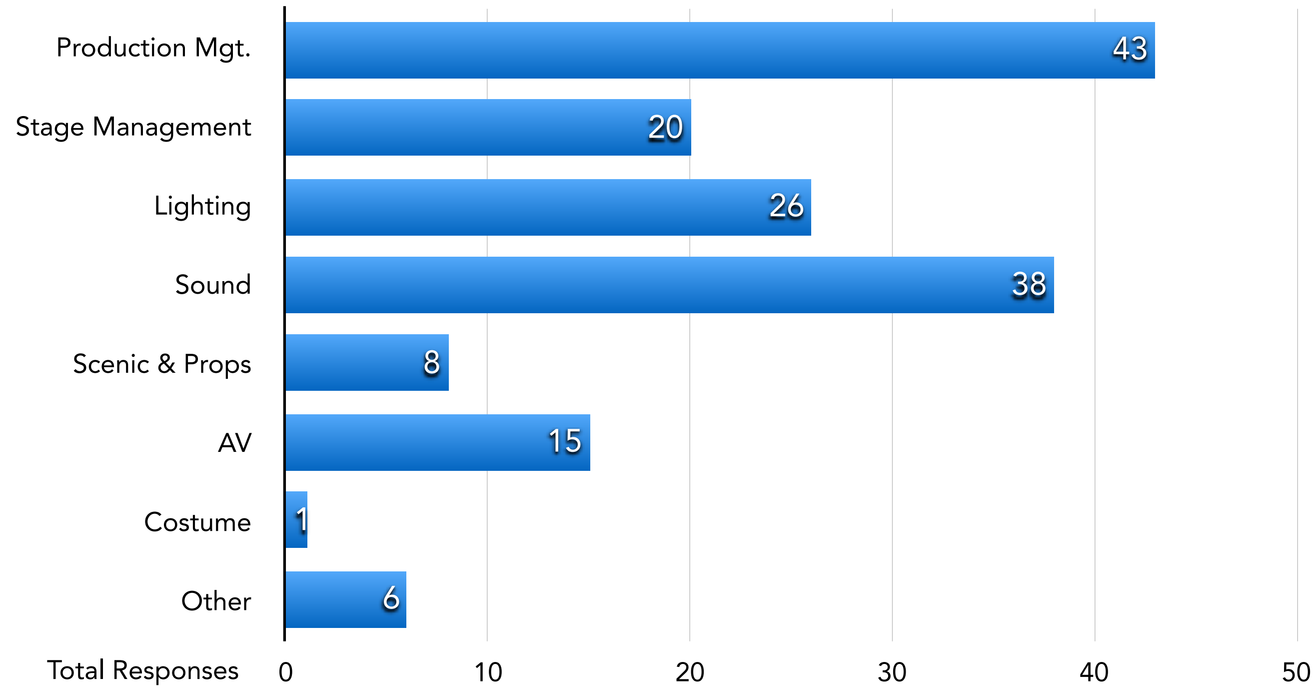
SOUTH AFRICAN CREATIVE INDUSTRIES TECHNICAL STAFF SURVEY
Conducted: November 2019
Report Published: April 2020
Investigators: Ronel Jordaan and David McGraw
www.sacits.com

INTRODUCTION: THE AIM OF THE SURVEY

This survey started through the age-old practice of sharing stories about how hard it is to work in the performing arts. Two veteran stage managers, Ronel Jordaan (South Africa) and David McGraw (United States), were discussing work/life balance. Based on this exchange of personal stories, it was discovered that technical staff working in the two countries shared many experiences but differed in some key ways. David McGraw had been conducting studies of American stage managers for over 13 years, which prompted similar questions about the broader field of technical staff in the Creative Industries (CI) in South Africa.

This report is based on information gathered in October-November 2019 from 166 South Africans who volunteered for an online survey. As not all survey participants answered every question, the "n=" statement in each question references how many participants answered that question. This report will not disclose data from groups smaller than 10 as it might inadvertently identify an individual. All responses were anonymous, but represented a wide range of technical professions in the Creative Industries.

Figure 1: Primary Technical Area of Employment (n=158)



The survey was designed for individuals, both freelance or in permanent employment, with the aim of better understanding the range of people who work in the technical fields of the Creative Industries. Giving a voice to individuals who are not necessarily represented by support frameworks such as Human Resources departments, BBEEE data or Unions (although all such individuals could participate in the survey) creates a starting point to hear where the health of our industry lies.

In some instances the report references comparisons with the US survey that ran simultaneously, but the US survey was only open to Stage Managers. The US survey has been developed over 13 years and reached 1,746 participants in 2019. Comparisons were purposely chosen to illustrate commonalities or differences in areas of shared interest, and percentages of responses were used, rather than overall response numbers, to ensure that the scale of the US survey does not lead to misrepresentation of the facts.

Jordaan and McGraw would like to sincerely thank every participant who volunteered time to share their thoughts, as well as every person and organization who helped us reach out to the participants. We hope to grow this survey into a regular platform to learn what technical staff think and feel about working in the Creative Industries in South Africa.

We make the gathered information available freely, in the hopes of assisting educators, entrepreneurs, and companies better understand the needs of their workforce, map past and future trends, and find ways to actively address workforce sustainability in our industry.
While this study will never fully represent all of the beliefs and practices of all South African technical staff, it hopefully will allow us to examine our shared experiences, appreciate our differences, and perhaps gain a glimpse of where we are headed.

Table of Survey Questions

SECTION I: DEMOGRAPHICS

Participants were asked several questions about their demographics (age, gender, race, etc.) as well as work experience. This information provides both a snapshot of the Creative Industries today, as well as a baseline to compare in future editions of the survey. For instance, the US study, which is conducted every two years, has been able to track over time how age impacts job satisfaction and how gender impacts salary negotiations.

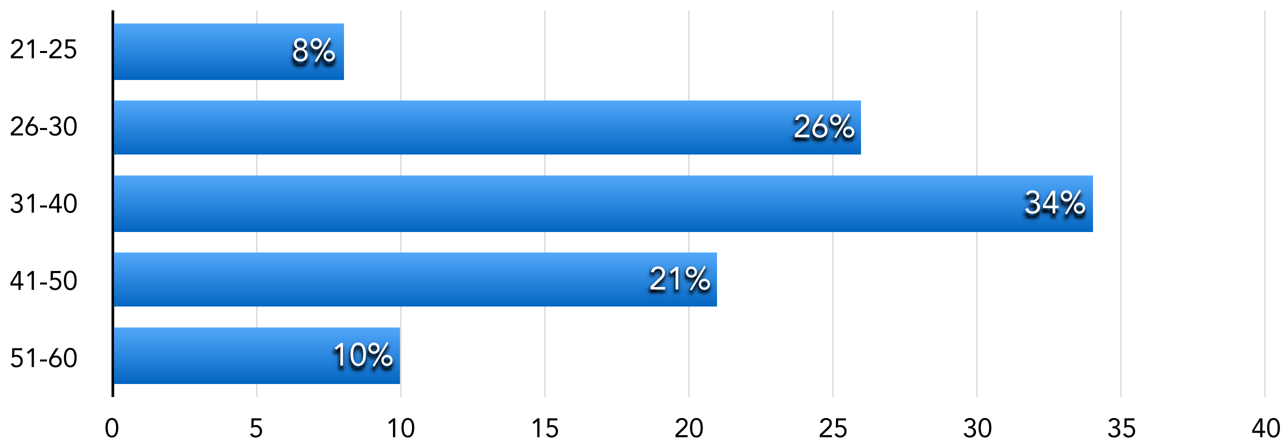
While the survey included responses from 166 participants, it did not reach all regions of South Africa equally. In this first edition of the study, Gauteng and the Western Cape accounted for over 90% of the participants. But even if most of 2019 survey participants primarily reside in these two provinces, only 78% reported working primarily in their home province. The reach of this first edition of the study likely resulted in an inaccurate representation of race: 80% of participants identified as as White, 8% as Black, 6% as Coloured, and another 6% listed "prefer not to answer." Future editions of this study, with increased support and broader reaches among South African technical staff, will be able to provide a clearer view of the accuracy of this record of racial representation.

Participation in this survey was limited to South African technical staff: 91% were South African citizens (4% of whom were working abroad at the time of the survey), 8% were SA permanent residents, and 1% had SA work permits. Of those participants who are not South African, a quarter had moved to South Africa specifically to work in the Creative Industries.

Three-quarters of survey participants (76% of 101 responses) identify as male, 23% as female, and 1% identify as non-binary. The area with the highest representation of women was Stage Management (64%, compared to 70% of American stage managers). We asked participants their age and how many years they have worked in the Creative Industries. In this first edition of the South African study, a strong majority of the participants have been working in the field for over a decade.

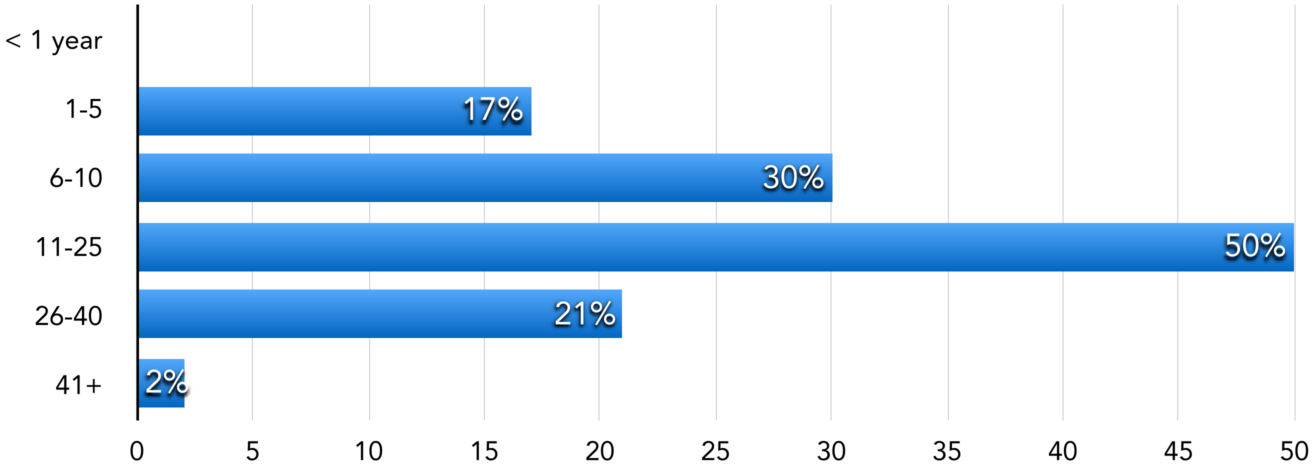
Figure 2: Age

(n=101)



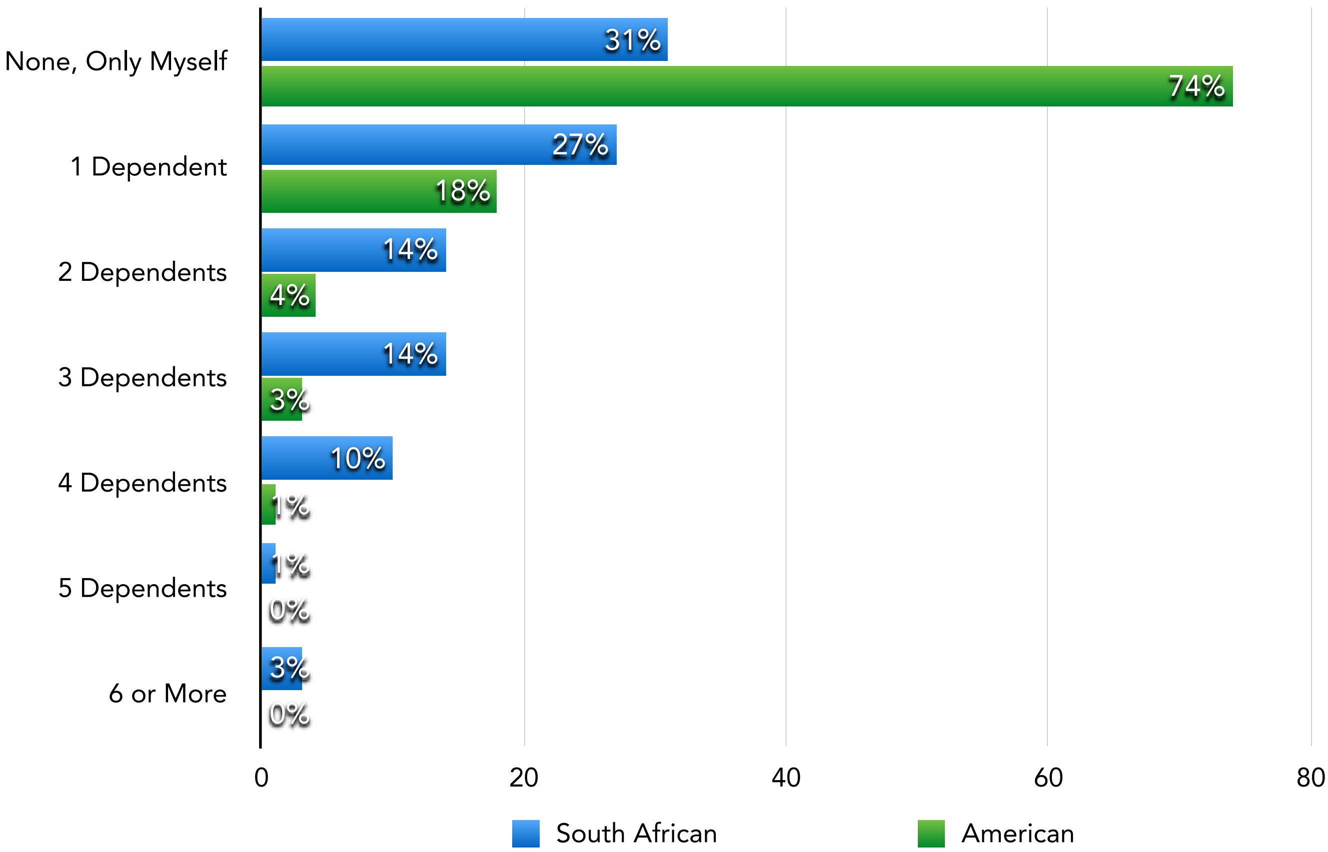
Note: Participants Under 21 and Over 70 years old represented less than 1% each.

Figure 3: Years of Experience in the Creative Industries (n=120)



Among 100 participants, 38% reported having a spouse/domestic partner/civil union, 4% were divorced, and another 26% stated that they were in a long-term relationship. Among married participants, 13% have a spouse in the Creative Industries and another 18% reported that their spouse used to work in the Creative Industries. All survey participants were asked how many people they were supporting with their careers. This information (n=100) was then compared to the American study (n=950).

Figure 4: Number of Dependents per Salary (n=100)



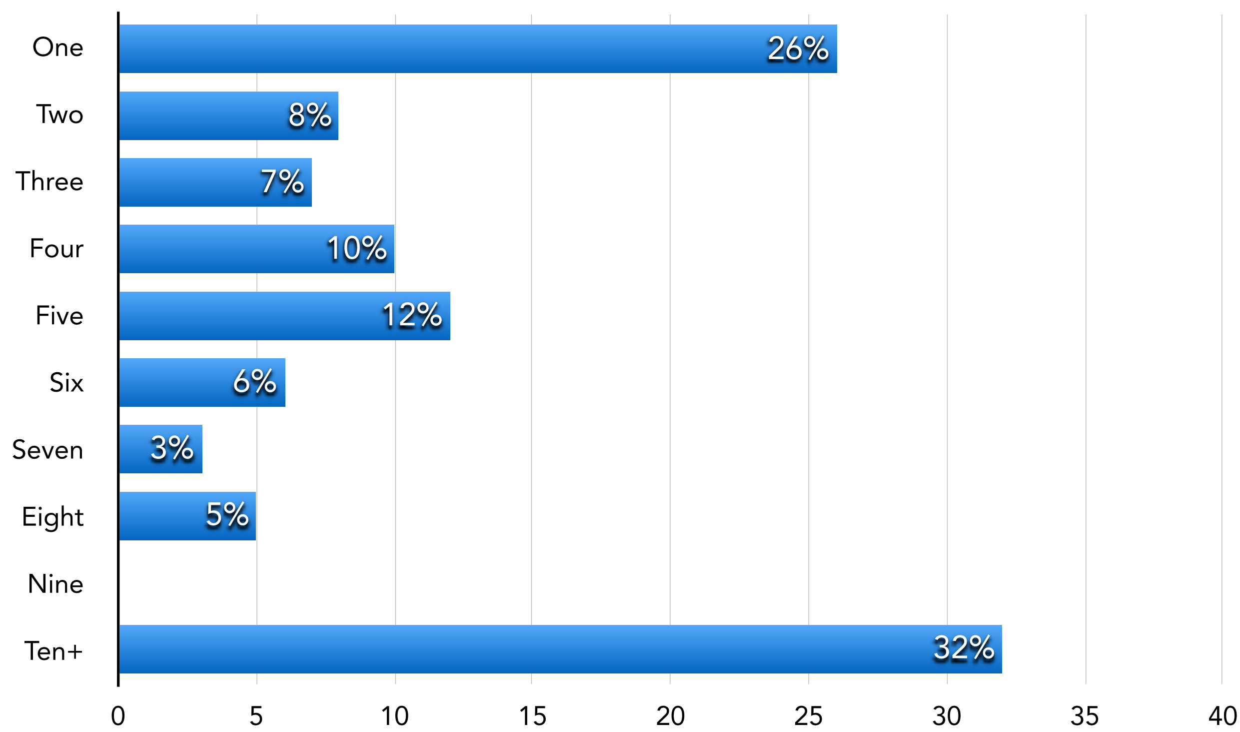
Section 2: Employment

This section examines how participants experience the work place, addressing issues such as commute, communication tools, brands and brand building, schedules, and job satisfaction.

One employment myth this survey dispels is the idea that people "moonlight" in the Creative Industries while working elsewhere. For 54% of respondents (n=127), the Creative Industries was their first career field, and career longevity represented in Figure 3 (Page 6) indicates that many technical staff make it their permanent career. Among 105 participants, 69% reported that in the twelve months leading up to the survey they earned 100% of their income from the Creative Industries. In fact, 72% noted that they only worked in their specific technical field in the Creative Industries.

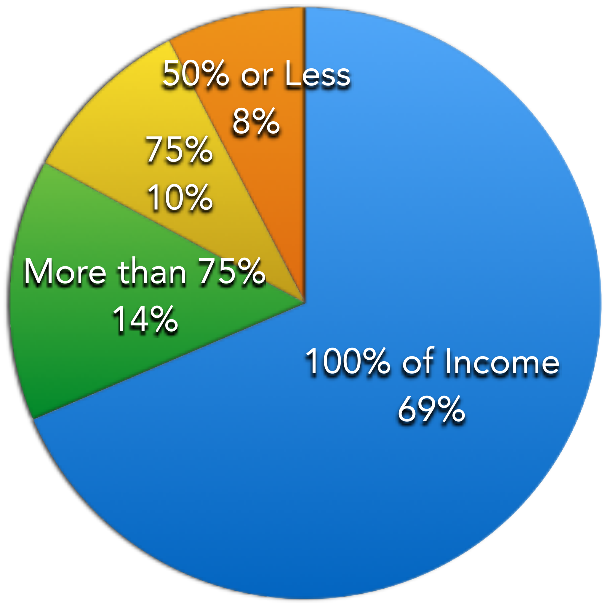
When asked about the number of CI employers [Figure 5], it appears that there is a prolific tendency from South African technical staff towards providing services for many employers. In fact, over half of respondents reported at least one new employer in the past year and 10% reported more than five new employers in the past year.

Figure 5: Number of Different CI Employers Over Past 12 Months (n=109)



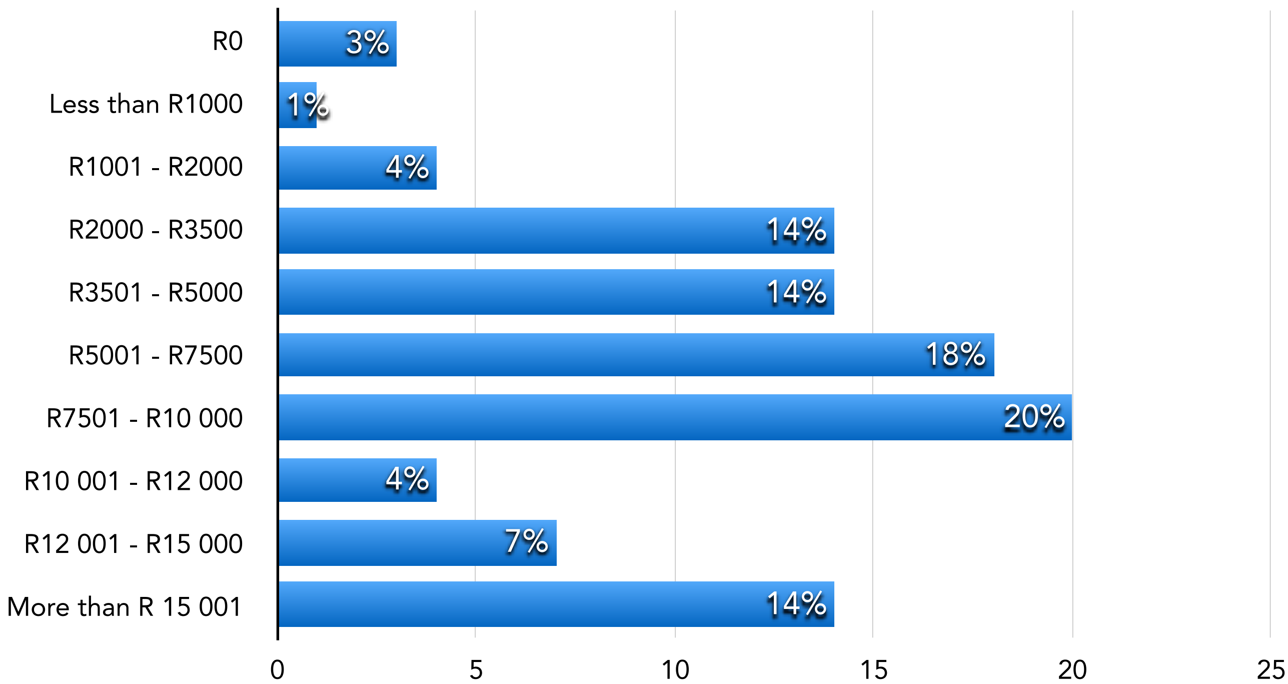
In contrast to industries where workers may have a single employer or only work part-time, the data from this survey indicates that Creative Industries professionals earn a living from a range of employers. Figure 6 illustrates participants percentages of income directly derived from the CI during the previous 12 months.

Figure 6: Percentage of Income Earned from CI in the Past 12 Months (n=105)



The survey did not ask participants to identify their annual income, but did ask income on most recent project to establish an income snapshot. Note: Region can have an impact on pay scale.

Figure 7: Income on Most Recent Project (n=104)



Which technical area gets the most CI work? AV technicians and stage managers hold the lead: 71% of both fields reported earning 100% of their income from the Creative Industries.

If more than half of the survey participants had more than 5 employers in the past year, how do they find work? A third of the participants use informal networks: 33% of participants stated word-of-mouth was their primary source of contracts, followed by social media. Some participants commented on the "closed club" or the difficulty qualified staff have in securing good contracts; the word-of-mouth aspect of job procuring could be a factor.

Over half (52%) of survey respondents indicated they hire staff, with Production Managers and Technical Directors leading the group [Figure 8]. South African Entry level positions [Figure 9], receive a wide range of applications per position, in contrast the the US survey where 59% of job openings receive ten or fewer applications. The survey did not establish how many of the applications translate into employees, nor did the survey establish if more experienced technical staff are recruited or employed through similar processes.

Figure 10 (n=98) examines how technical staff promote themselves and their projects on social networking sites. More and more jobs are offered through social networking sites; Figure 10 also shows which sites are most frequently used to schedule job interviews and to make job offers. The "Other" category included blogs, podcasts, and social media websites such as Tumblr.

Figure 8: Hiring Manager for Most Recent Job (n=114)

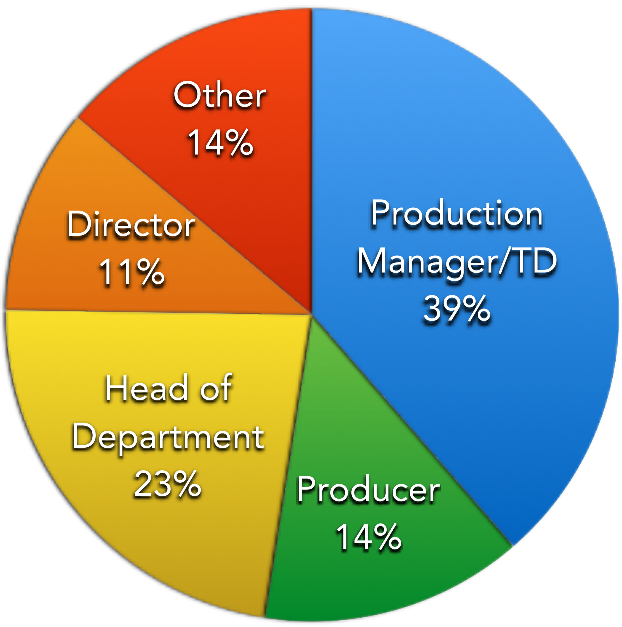


Figure 9: Number of Applications Received for Entry-Level Technical Positions (n=52)

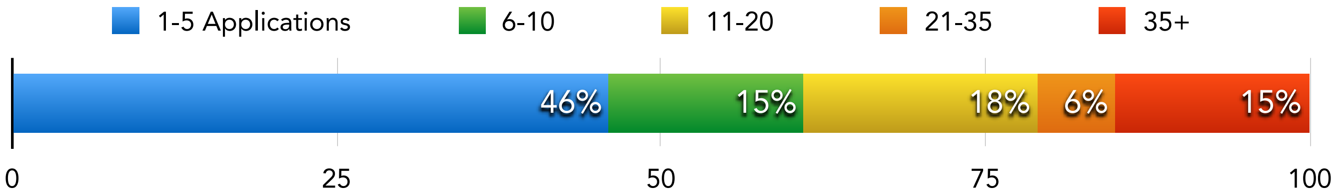
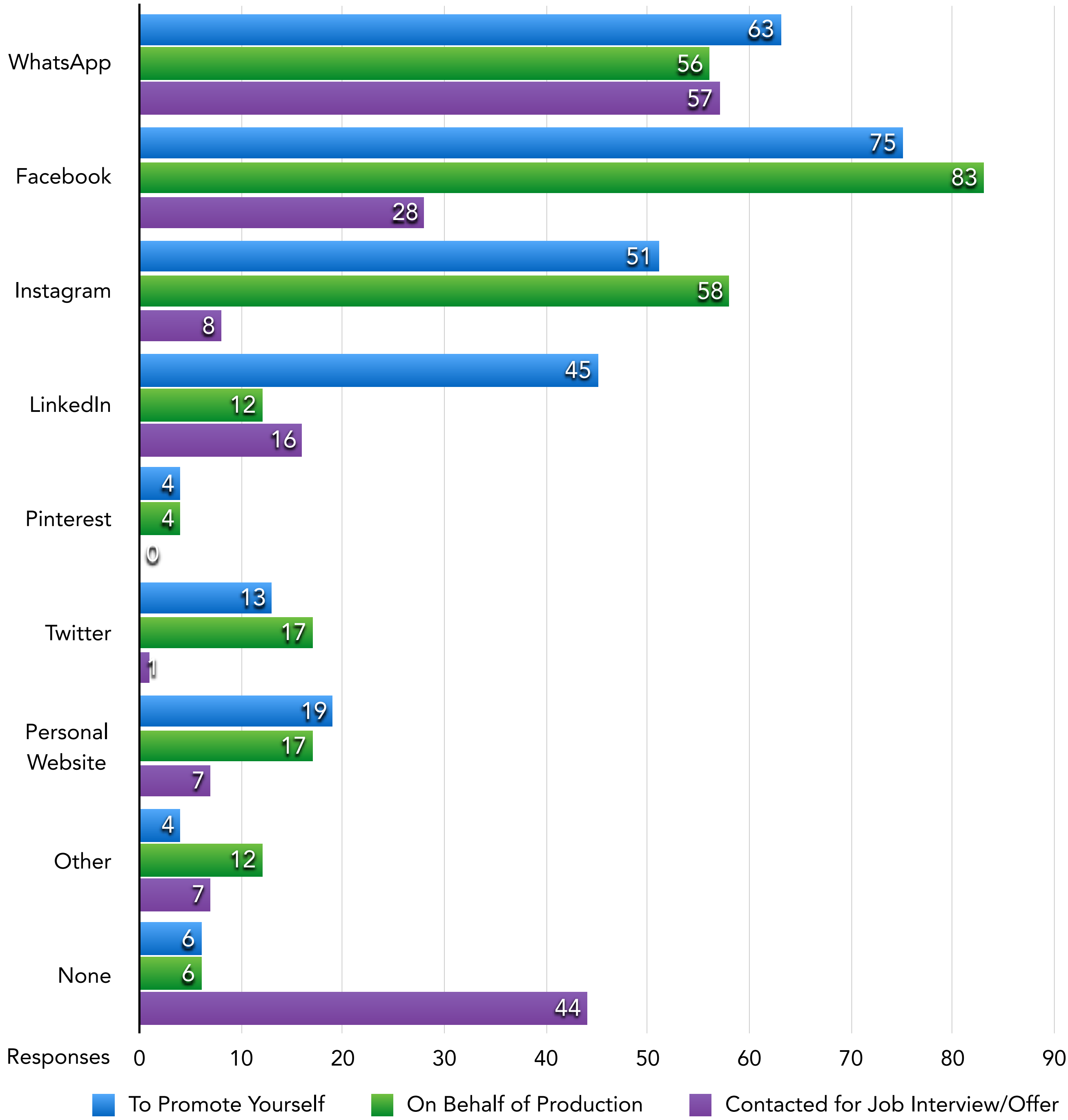


Figure 10: Social Media Usage for Promotion and for Job Interviews/Offers (n=98)



Compared to their American counterparts, South African technical staff are more likely to negotiate. Figure 11 compares the two groups in both how frequently they negotiated over their last three jobs and how often they were successful. It should be noted that 61% of American participants belong to unions that negotiate minimum fees for them. Negotiations were for both higher pay [Figure 12] and non-salary outcomes [Figure 13]. Over half (53%) of South African participants did not negotiate for non-salary outcomes. Figure 13 shows the percentage of each category. Some of the "Other" non-salary compensations identified included meals and per diem.

Figure 11: Frequency and Success Rates of Negotiations in Last 3 CI Jobs (n=103)

	Negotiated All 3 Times	Negotiated at least Once	Never Negotiated	Always Succeeded	Sometimes Succeeded	Never Succeeded
SA 2019	22%	28%	50%	31%	50%	19%
USA 2019	10%	33%	56%	34%	47%	19%
USA 2017	8%	26%	66%	29%	51%	20%
USA 2015	8%	33%	59%	24%	69%	7%

Note: n=1245 for the 2019 American survey

Figure 12: Additional Pay Earned through Negotiation (n=41)

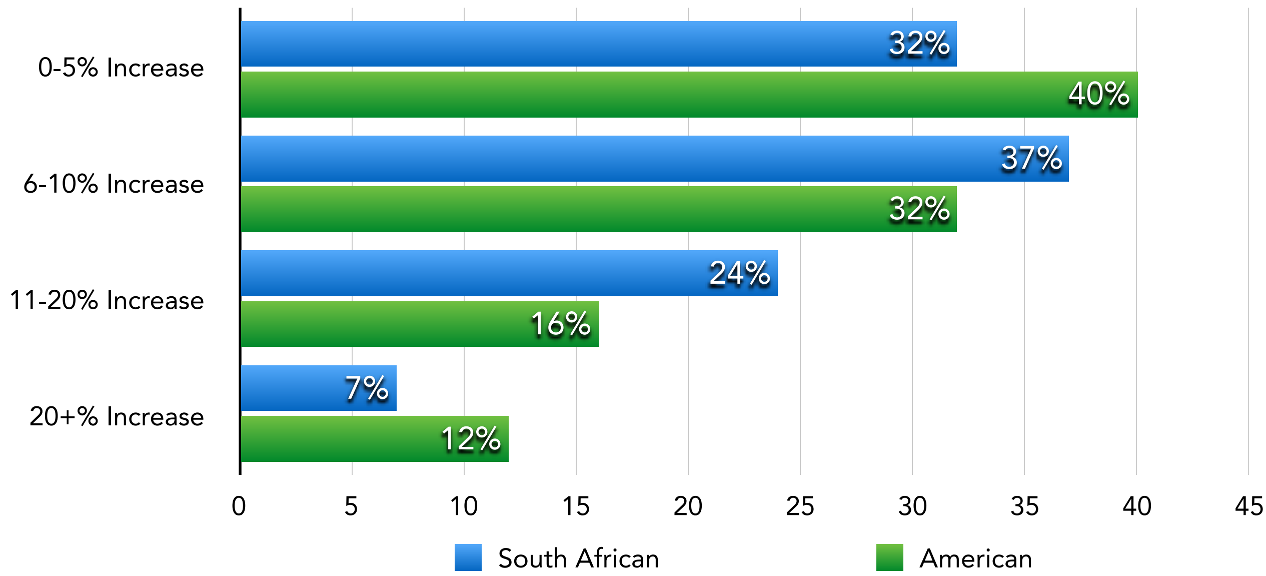
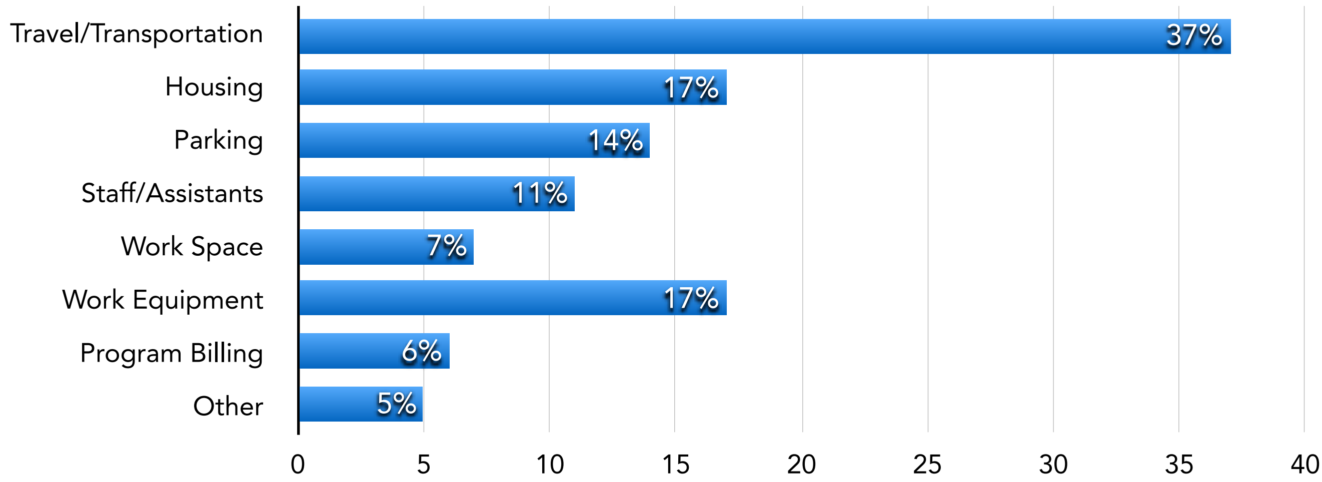


Figure 13: Non-Salary Items Negotiated on CI Jobs (n=102)



Note: Participants could select more than one category.

As part of the hiring process, the survey also asked if participants have experienced discrimination in the workplace. When asked whether identity discrimination ever affected their Creative Industries career, 37% reported not having personally experienced workplace discrimination (n=97, 2 preferred not to answer). For the 58 survey-participants who reported identity-based discrimination, the most common discrimination was race-based (43% of responses), followed by age (27%) and gender (22%).

While some salaries may be substantial, at what cost of work/life balance do we earn these wages?

Figure 14: Hours Worked During Regular and Tech/Production Weeks (n=98)

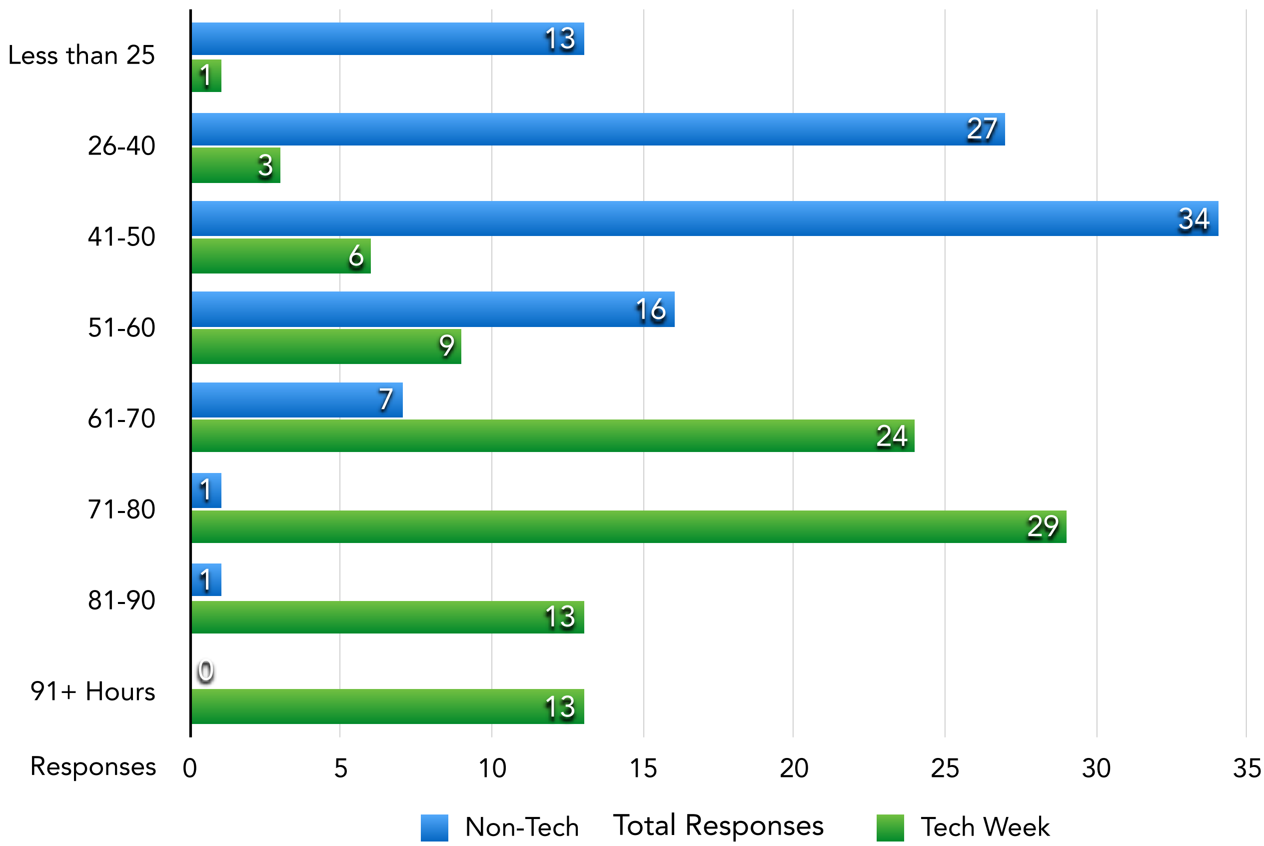
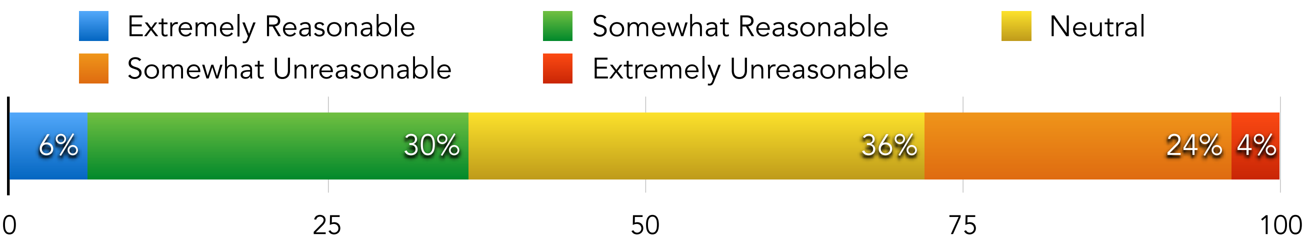


Figure 15: Participants Response to Tech Week Schedule (n=98)

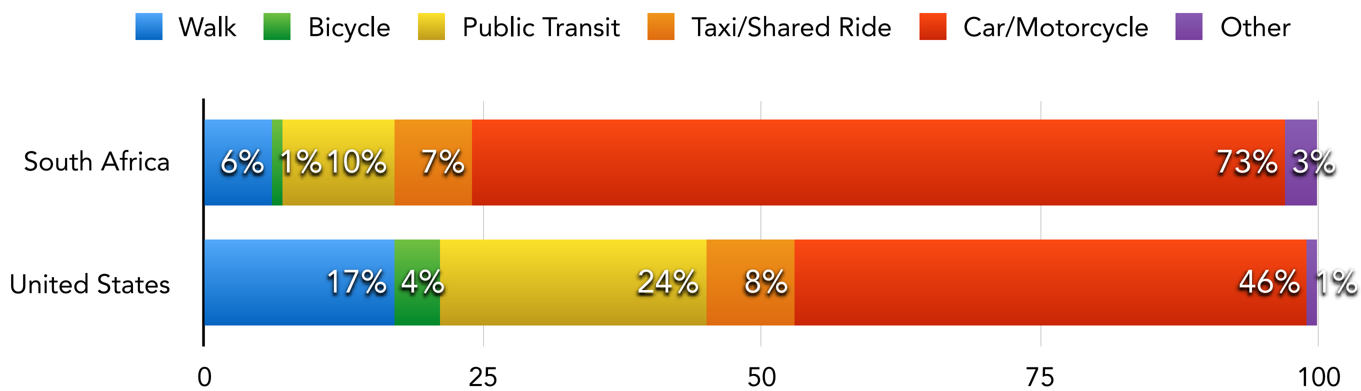


Besides lengthy, sometimes extreme, work hours per week, 30% of participants indicated they took no vacation in the past 12 months, excluding any unpaid time off work.

In an effort to establish the possible impact that the commute to the workplace has on participants' work experience, questions were asked about mode of transport and duration of commute. South African technical staff reported their commute times as: 33% spent less then 30 minutes, 55% spent between 30 and 60 minutes, and 12% spent over an hour commuting to work on their most recent job.

For 72% of participants the daily commute is with personal transport. The research did not establish whether or not a lack of access to transport negatively impacts the professional's work opportunities. Figure 16 shows comparative data from South Africa (n=98) and the US (n=1506) on transport.

Figure 16: Commute to Workplace on Most Recent Contract (n=98)

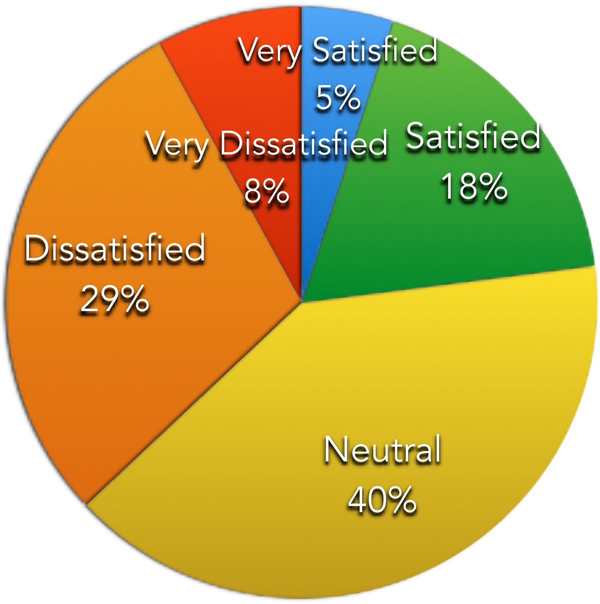


Note: It was possible to select more than one method of transportation to commute to a job.

The researchers acknowledge that the use of public transport figure from the US survey is heavily impacted by cities such as New York where there is an excellent public transportation system with a large base of daily commuters that does not exist in other areas of the US. New York accounts for 41% of all public transport reports. Nevertheless, both surveys cite the use of private transport as the predominant way to earn a salary with in the Creative Industries.

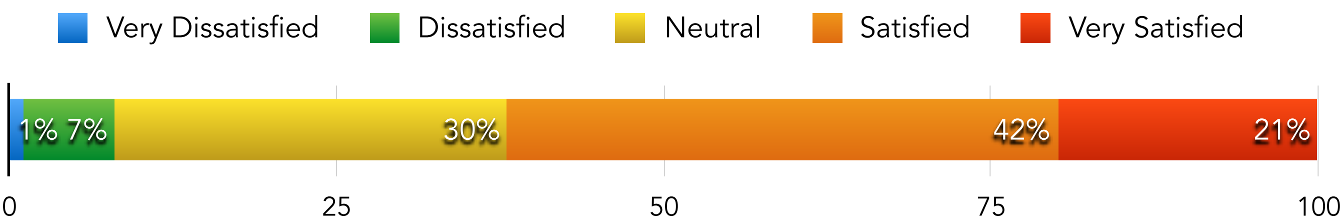
The largest segment of participants felt neutral about their work/life balance, but over a third indicated dissatisfaction with the impact work has on the balance. Combined with the comments on the possibility of leaving the industry, there is evidence that CI technical staff may be nearing a breaking point. However, a number of participant comments indicate that the opportunity of team work and stimulating creative outputs continue to drive this workforce to remain in the Creative Industries.

Figure 17: Satisfaction with Work/Life Balance (n=102)



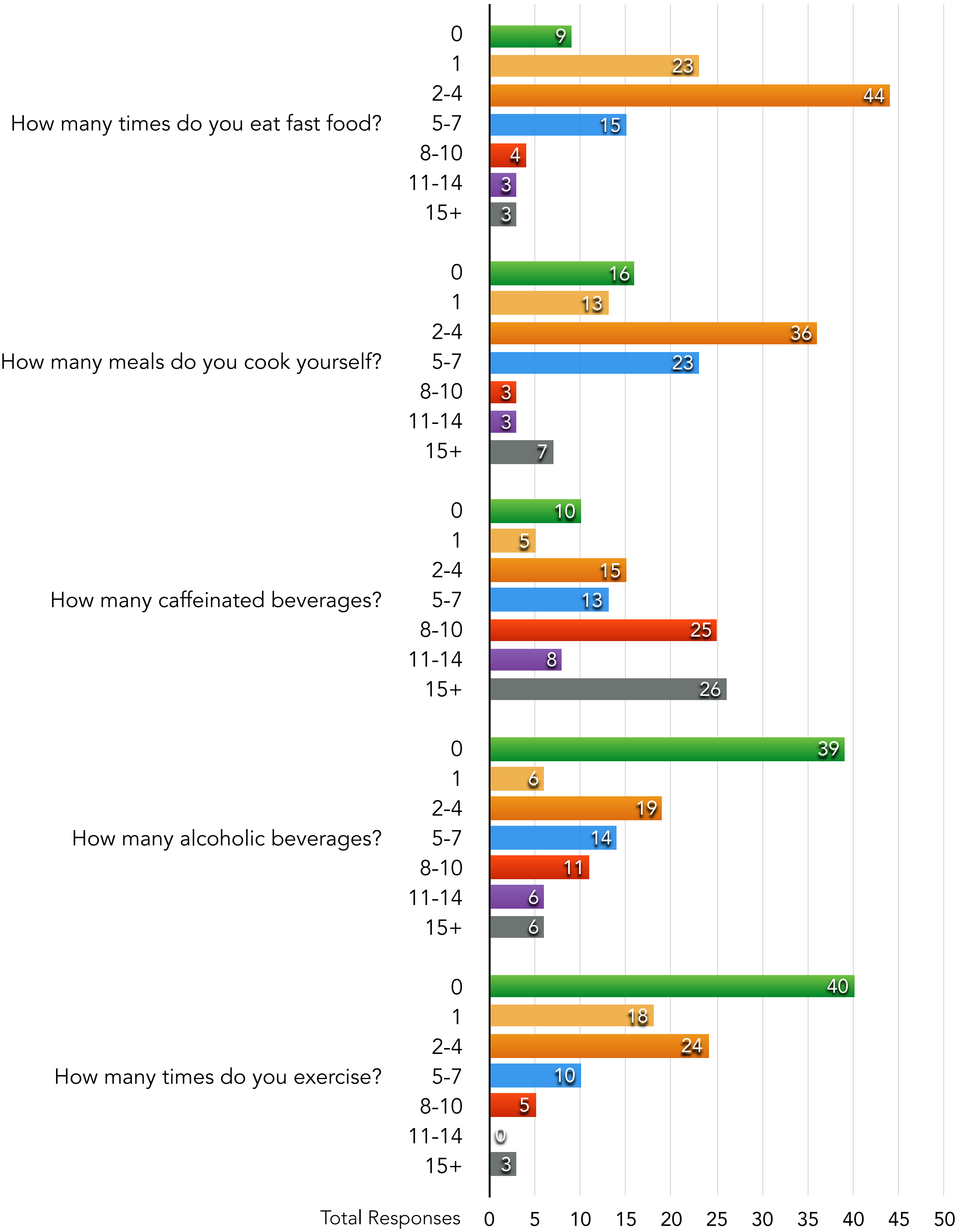
Participants indicated that keeping a work/life balance was particularly difficult at the start of a career, when individuals hold down more than one job to cover expenses. There seems to be a "lack of middle ground" with work being either all-consuming or very slow. Freelancers indicate a need to be prepared "in case there is a drought in the industry" as one reason for taking on too many contracts, impacting on work/life balance. The reasons for dissatisfaction with Work/Life Balance fell into three major categories: total hours worked, separation from family, and impact on health. But while they may not be pleased with their work/life balance, most survey participants were satisfied with their careers overall [Figure 18].

Figure 18: Career Satisfaction (n=101)



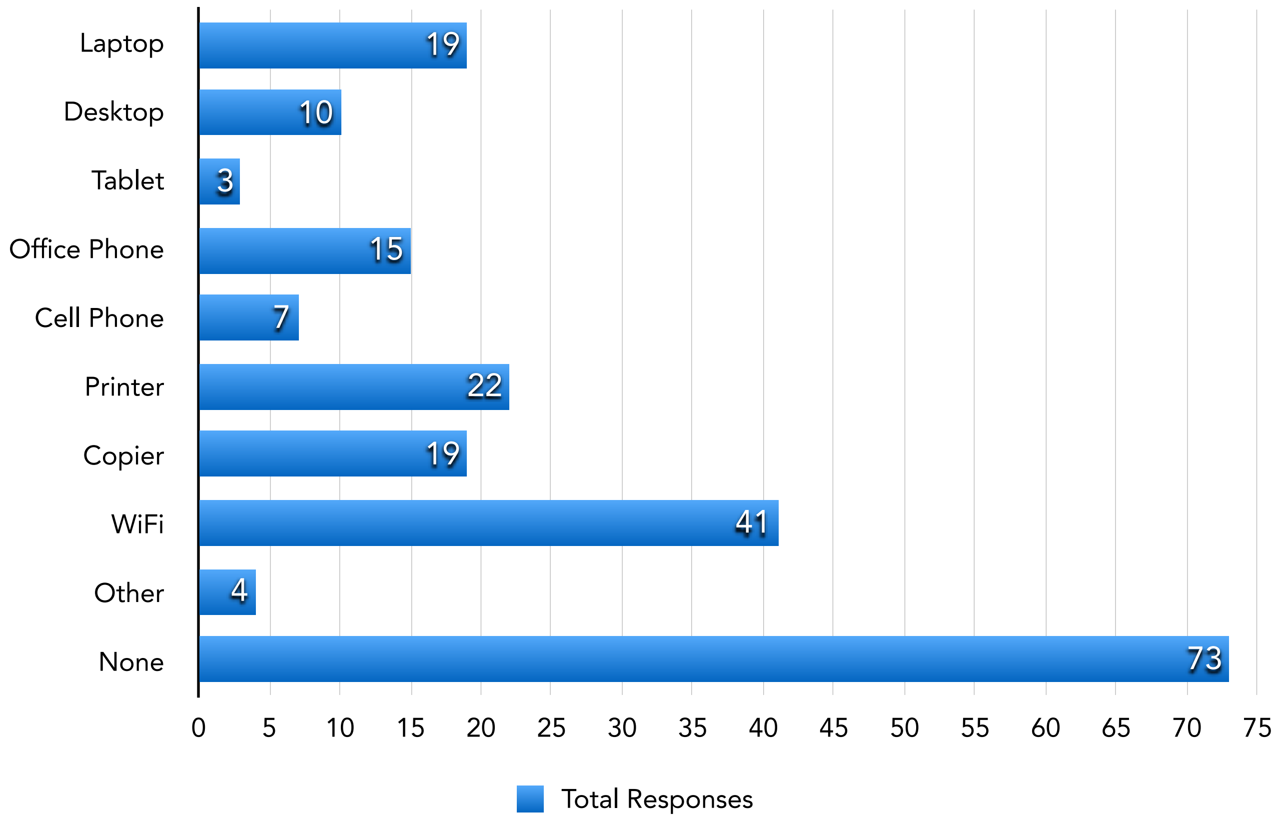
The harsh hours can lead to unhealthy lifestyles. To measure the impact on health, all survey participants were asked a series of questions about their eating, alcohol use, and exercise practices.

Figure 19: Fast Food/Caffeine/Alcohol Consumption in a Regular Work Week (n=102)



Technical departments differ operationally. The survey gathered data on shared aspects such as supply of equipment in the workplace, theft, and communications. The survey also gathered data on field-specific information.

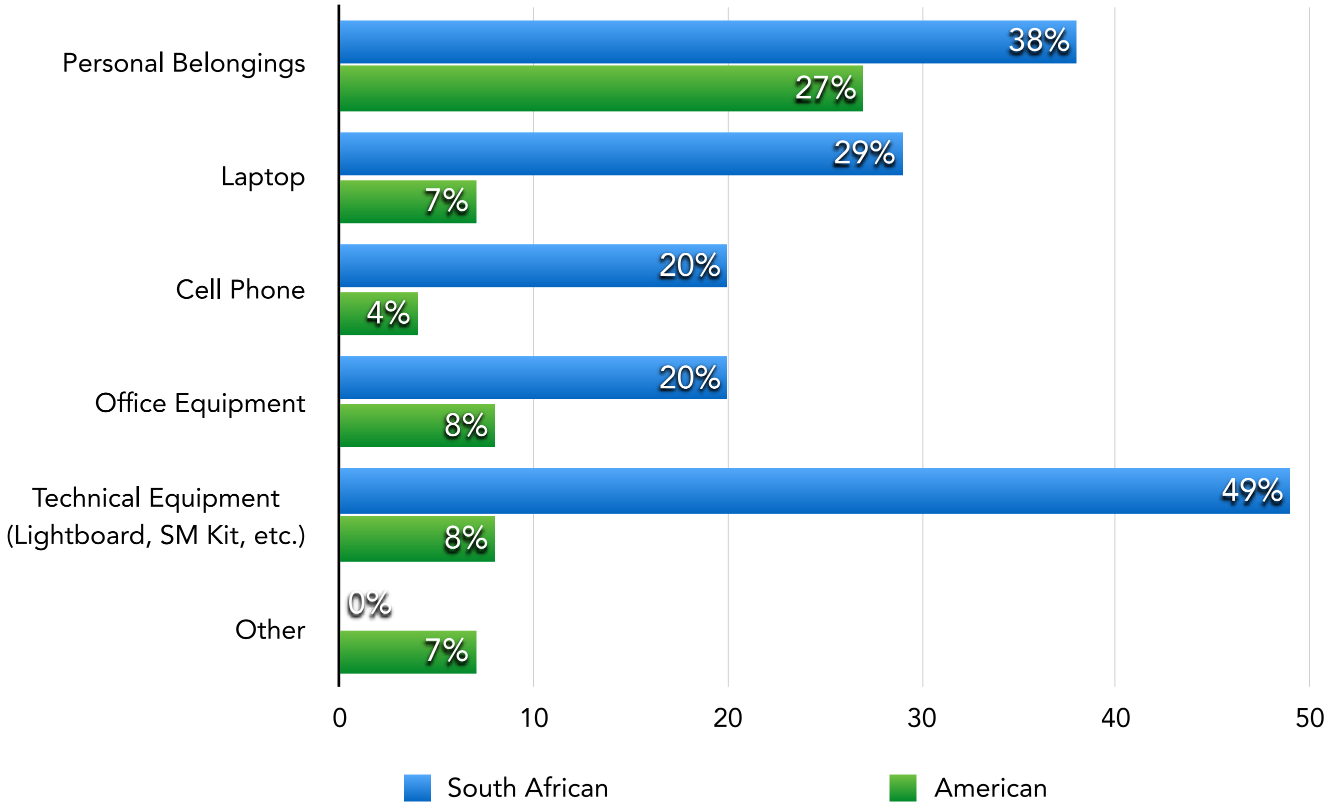
Figure 20: Office Equipment Supplied by Employers (n=122)



Note: It was possible to select all that apply.

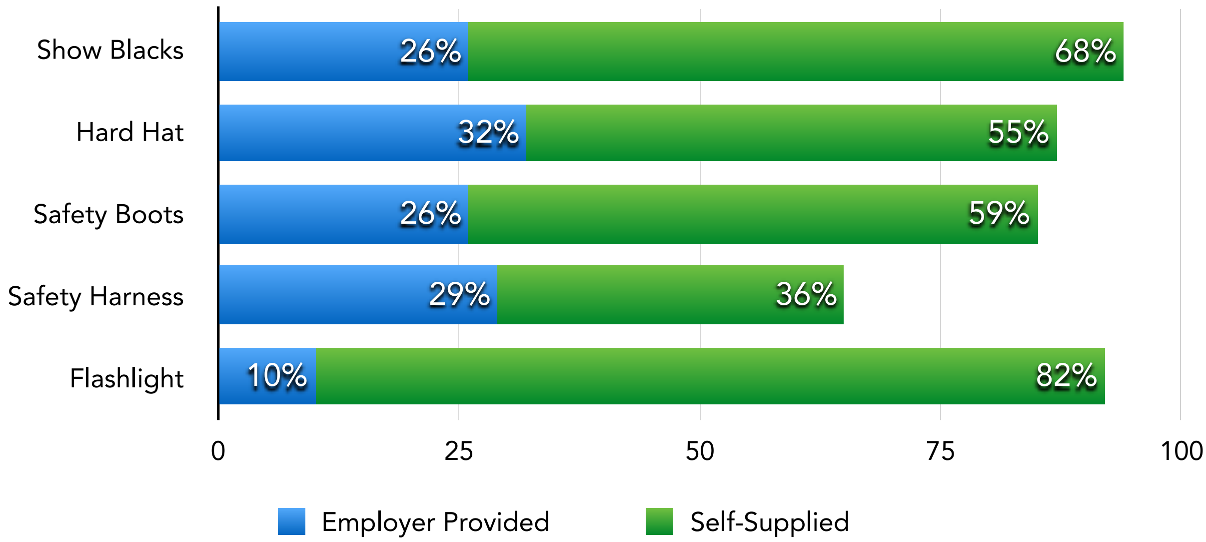
Both the South African and the US survey posed the question of theft in the work place. While 28% of surveyed South Africans (n=127) and 61% of surveyed Americans (n=1517) reported no workplace theft in the past five years, Figure 22 lists the types of items stolen in both countries. There was not an "Other" category in the South African survey; most of the "Other" items cited in the American survey were props and costumes, but also larger items such as appliances in housing and pianos in rehearsal spaces.

Figure 21: Theft in the Workplace in the Past 5 years (n=127)



There is the accepted theatrical practice of wearing "show blacks" for performances. The survey asked participants what else they require to perform their duties and if employers provide these.

Figure 22: Equipment Provided or Self-Supplied in the Past 2 Years (n=91)



Of those participants who work with consoles 33% (n=67) indicated that they bring their own, whilst only 11% (n=41) specify a specific brand of console in their contract.

Some CI technical positions are required to work and hang equipment above the stage / audience. Of those participants who regularly work at height as part of their duties only 25% indicated holding a relevant industry qualification for this duty and only 1% indicated they are in the process of getting qualified (n=40).

Calling from a digital script was not popular amongst South African Stage Managers, with the overall recommendation being not to use it, matching their American counterparts. Meanwhile 80% of South African Stage Managers (n=20) use hand written cues in their scripts, compared to 56% in the US survey.

While 43% of South African stage managers (n=12) ran lights and 33% of them sound at the same time as being the stage manager. None of them got paid extra for doing so. This is in comparison to 26% in the US (n=757) receiving extra pay for running a board.

In discussing taking over calling a show, South African Stage Managers indicated that 58% have taken over calling a show, with an average of one show to learn, with four performances to learn being the most. In the US survey 48% of participants indicated taking over a show, with 26% receiving no training, 23% being trained on one performance, and 25% being trained over two performances.

In initial communication, that contact information is primarily distributed by the Production Manager. In the past year South African Stage Managers favored the use of text message or WhatsApp as a mass communication tool to casts.

Figure 23: Source of Company Contact on Most Recent Production (n=141)

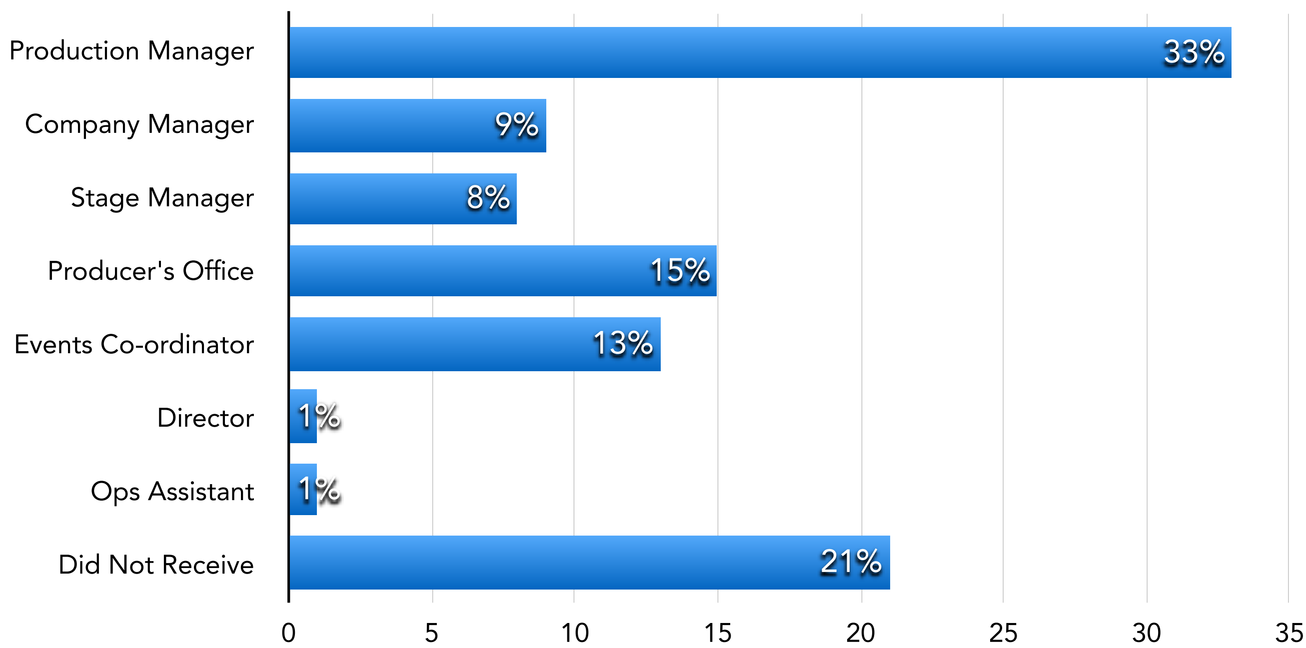
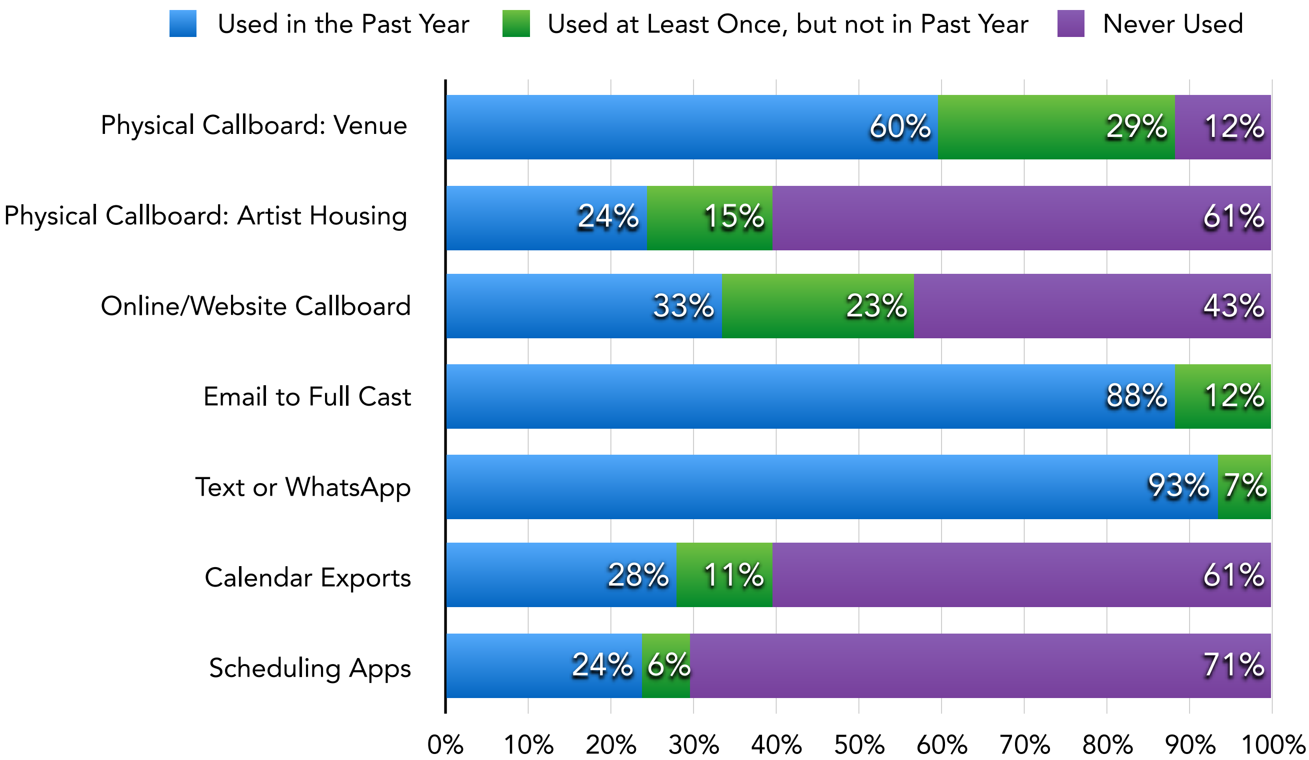
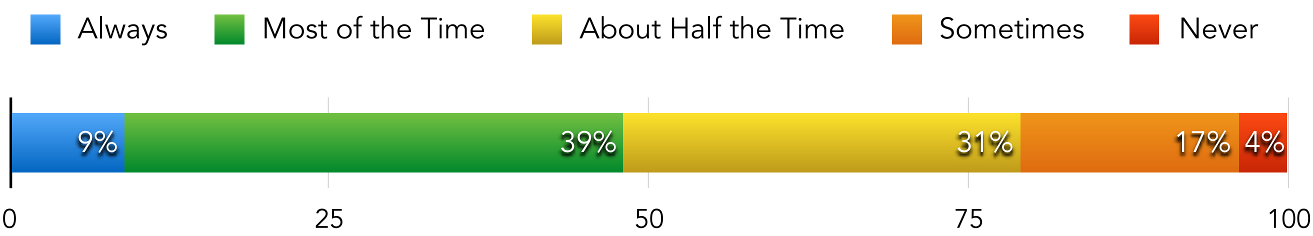


Figure 24: Techniques/Technology to Distribute Group Information to Performers (n=39)



Access to information during the design phase was asked across all departments, with only 9% of participants indicating that they do in fact receive sufficient information from their designers during this phase [Figure 25].

Figure 25: Access to Necessary Information During the Design Phase (n=104)

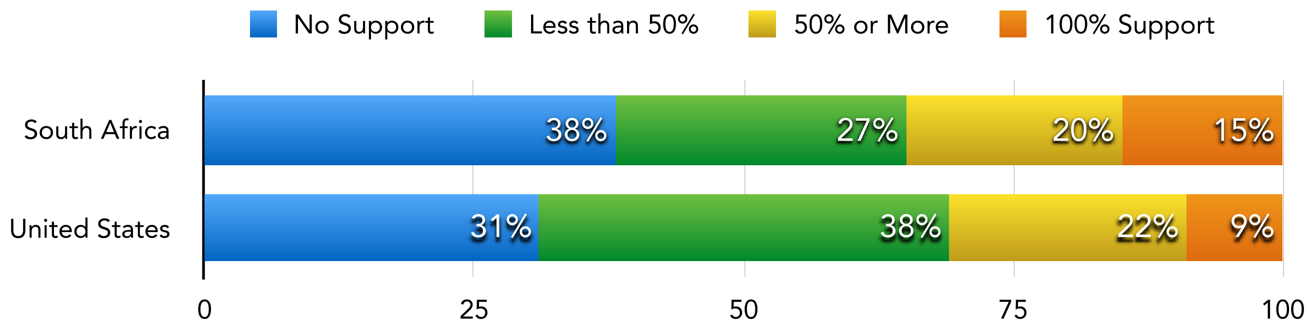


According to the survey, 69% feel that it is the sound department's job to set up the comms system, 11% felt stage management, 7% production management and lighting got a mention with 4%!

Section 4: Training and Education

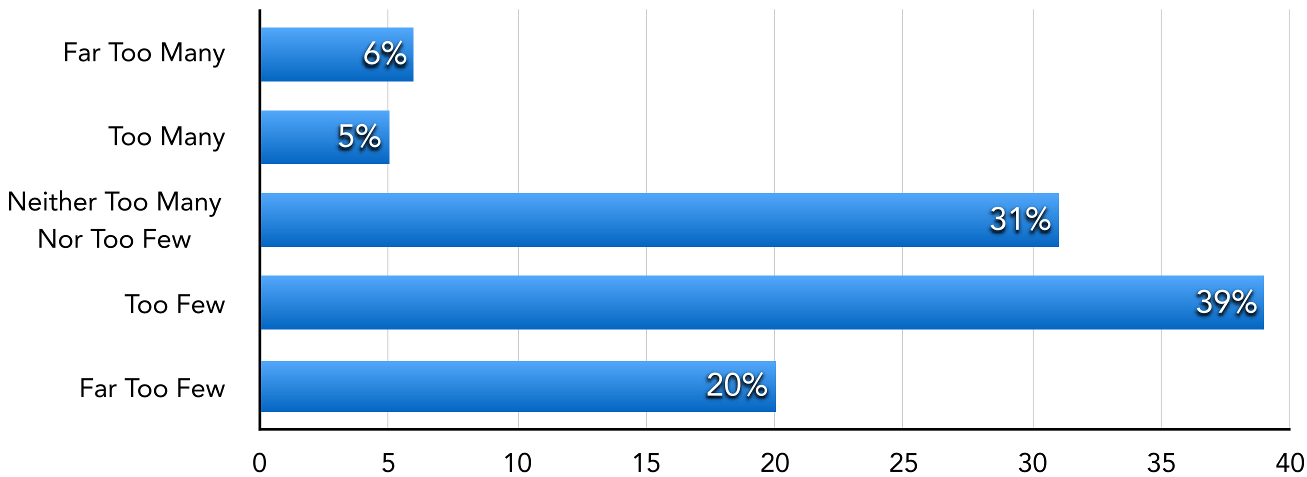
The 2019 survey asked participants about their access to the Creative Industries (CI) as children. A full third of participants (34% of 160 responses) had no access growing up and only 13% had an immediate family member involved in the CI in either paid or volunteer positions. Figure 26 compares South African technical staff (n=113) to American stage managers (n=1261) in the amount of financial support at the start of their careers. The categories represent the percentage of cost-of-living, not specific rand or dollar amounts.

Figure 26: Percentage of Financial Support received at the start of CI career (n=113)



A total of 42% of survey participants have a minimum qualification of at least undergraduate level. This finding is significant because it shows that, people who value and can afford tertiary education, are pursuing CI careers, thereby demonstrating the need for technical skills courses that hold affiliation and accreditation at tertiary level. In fact, 5% of survey participants have completed post graduate studies at either the Masters or Doctoral levels. In terms of specialized studies, 81% reported that their post high school qualification (n=94) was in a CI field. Nearly all respondents (68 of 72 responses) completed their CI studies in South Africa. Yet the consensus among survey-takers was that there are not enough educational options for the field.

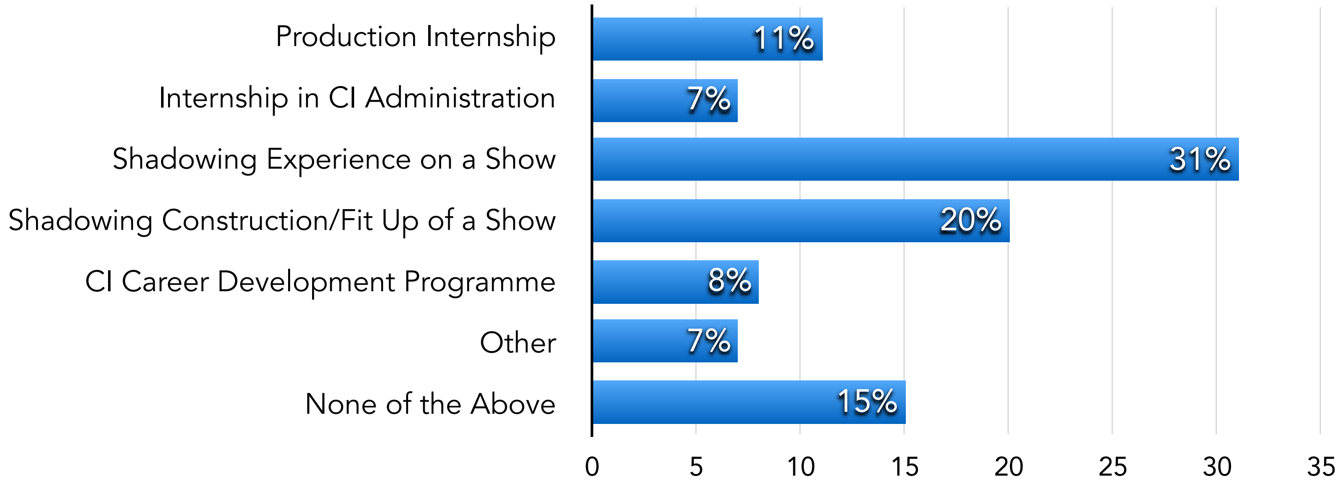
Figure 27: Educational Opportunities for Qualifying in a CI Profession (n=100)



When asked whether they themselves might become an educator to address this shortage of opportunities, 17% responded Extremely Likely and 38% responded Likely, but only 25% currently hold a qualification that could start their journey to becoming an educator at the tertiary level.

Figure 28: Additional Training Received in the Field

(n=112)



Note: Participants could select more than one category.

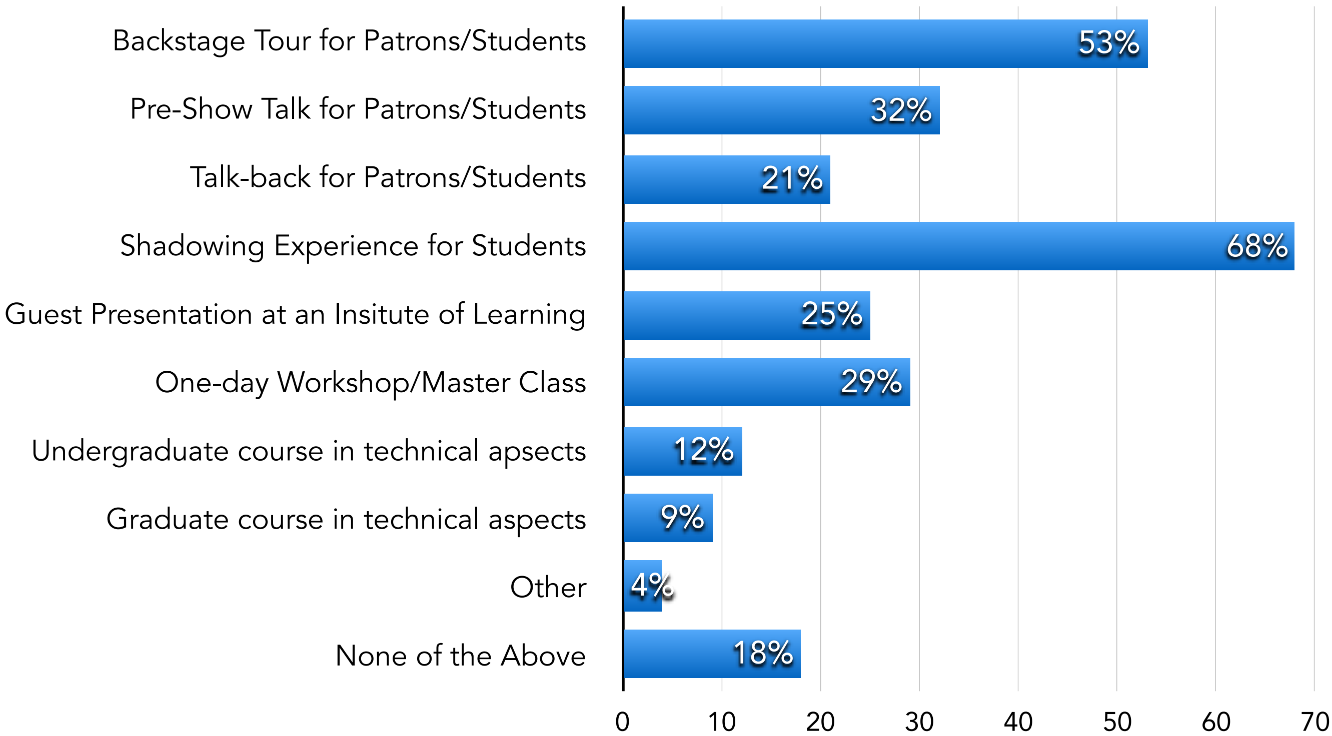
> 46% of South African Stage Managers indicated they do not read music, compared to 10% of their American counterparts.

The pool of survey participants who had completed an internship in the past two years was too small to report data, but internship earnings ranged from unpaid positions to more than R1500/week with most respondents not receiving overtime pay. Among participants who interned at any point in their career, over half reported taking an internship to enter a new market even though they already had professional technical experience. The US study found that 30% of American internships are unpaid and another 2% require the student to pay the employer for the internship. All participants who had completed internships reported the experiences as useful, with 62% categorizing their internship as Extremely Useful.

CI technical staff have been very generous with their time to provide training and education to others. Some of the "Other" activities included curriculum development, technical equipment training at a school, and workshops for very young children.

Figure 29: Experience in Teaching/Facilitation in Past 5 Years

(n=112)



Note: Participants could select more than one category.

As other countries formalize their training and education programs in the Creative Industries, how will this impact South Africa's competitiveness for qualified technical staff? Figures 27-29 show that there are many training opportunities but, according to survey participants, not enough formal education programs. The cost of acquiring skills through formal training, the cost of establishing such training and quantifying the value such recognized training contributes to the sustainability of the South African Creative Industries are all topics that require further exploration.

Conclusion

The researchers acknowledge that the survey is an initial snapshot into the working conditions of technical staff working in the Creative Industries and that future surveys would build on number of participants and the nature of questions asked.

The survey explored aspects of career satisfaction, career longevity and aspects of unemployment that might impact on a practitioner's decision to stay with the South African Technical Industries long term. The findings on career satisfaction were mostly satisfied, but practitioners did share commonalities around long hours, lack of family or holiday time and that a freelance lifestyle and quantity of work cycles are not sustainable. That the hours are long and the demands made by schedules from employers and clients in many cases unreasonable.

Many felt that the satisfaction of teamwork and building new experiences was a main driver for choosing and remaining in the CI. Based on the number of respondents who plan to leave the CI in the near future [Figure 29], there seems no clear indication that the industry will retain its current skills level. Figure 30 shows the major factors that contribute to the decision to leave the CI. It should be noted that only those participants who stated that they are Very Likely or Likely to leave the CI were asked to identify the contributing factors; these factors are not minor complaints but a major reason for someone considering leaving the Creative Industries.

Figure 30: Likelihood of Leaving the CI in the Next 5 Years (n=101)

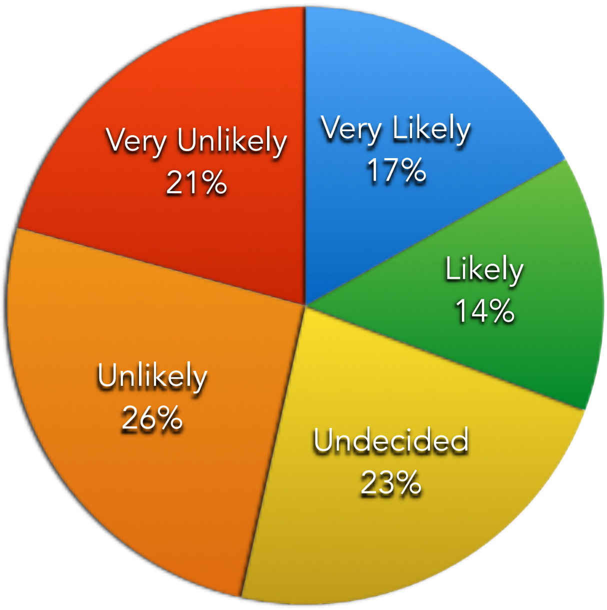
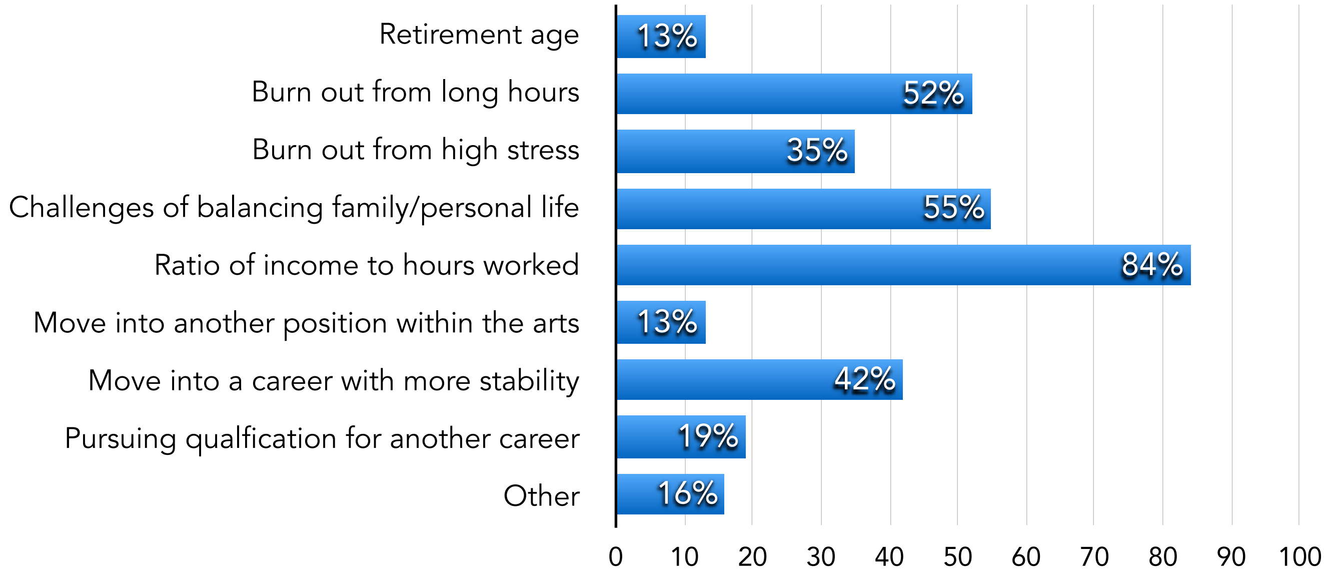


Figure 31: Contributing Factors in Decision to Leave the Creative Industries (n=31)



Note: Participants could select more than one category.

Although this report was written during the COVID-19 pandemic, the data was gathered prior to the outbreak, this study could be seen as 'taking the temperature prior to the disaster' and viewed as a baseline for future studies that examine the changed landscape of the Creative Industries. For instance, only 2% of participants indicated that they collected unemployment in the past 12 months (n=112). At the time the survey did not explore extensive reasons for collecting or not collecting unemployment beyond clarity of the unemployment application process (40% found the process extremely unclear while 16% found it somewhat unclear). Perhaps payments and employment was robust and unemployment collection was not required. Or did participants want to claim, but did not qualify as they didn't work on contracts that contributed to the National Unemployment Insurance Fund? These are questions for further exploration in the 2021 survey, along with COVID-19's impact on the employment landscape.

We would again like to thank all of the volunteers who made this initial survey so successful. The information gathered will help to form a better understanding of who the individuals are that commit to working in the technical fields of the South African Creative Industries and how the Industry at large can engage with a better working environment for all. The information in this report is available free of charge, the researchers encourage the sharing of this information through various networks and ask only that the use of this work is properly accredited: