CULTURAL STATISTICS SURVEY REPORT 2012

'Measuring the Economic Contribution of
Zimbabwe's Cultural Industries'

CULTURE FUND
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Convention on the Protection and Promotion of the Diversity of Cultural Expressions

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For further information contact:

The Director-General, Zimbabwe National Statistics Agency (ZIMSTAT), P.O. Box CY 342, Causeway, Harare, Zimbabwe, Telephone: 263 4 706681-8 and 703971-7, Fax: 263 4 762494, E-mail: dg@zimstat.co.zw, Website: http://www.zimstat.co.zw

The Executive Director, Culture Fund of Zimbabwe Trust (Culture Fund), 51 Harvey Brown Avenue, Milton Park, Harare, Zimbabwe, Telephone: 263 4 794211 and 794530, Fax: 263 4 794617, Website: www.culturefund.org.zw

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PREFACE

In Zimbabwe, the cultural industry has, over the past few years, emerged as a source of income, employment and a tool to assert the people's national identity. The cultural industry contributes immensely in attracting tourist inflows and building the country's image. The Government has shown support for the industry by creating national cultural institutions such as the National Arts Council of Zimbabwe, the National Gallery of Zimbabwe, the National Library and Documentation Services, the National Museums and Monuments of Zimbabwe and the National Archives of Zimbabwe. Despite all the efforts made to uplift the cultural industry, measuring the socio-economic contribution of the cultural industry to the economy remains a challenge.

The economic benefits of the cultural industries to individual and community development are being advocated across the globe. Culture plays a key role in all societies around the world, influencing various facets of peoples' lives, from leisure to professional activities. The role of culture in development has also recently emerged as an important policy issue. However, preserving and respecting the specificity of each individual culture as well as the distinct qualities of other cultures is the challenge that must be met globally (UNESCO Framework for Culture Statistics, 2009). A baseline survey conducted by the Culture Fund of Zimbabwe Trust in 2009 concluded that data and information on the cultural industry is poorly documented due to lack of a centralized information and knowledge management system[1]. To address the gap, the Zimbabwe National Statistics Agency (ZIMSTAT) in partnership with the Culture Fund conducted a survey that initiated a process for the identification, collation and dissemination of statistical data on the cultural industries of Zimbabwe. The survey was conducted in Harare and its major surrounding areas (Ruwa, Epworth, Norton and Chitungwiza) using the 2009 UNESCO Framework for Cultural Statistics (FCS) as a basis.

The Zimbabwe National Statistics Agency and the Culture Fund would like to thank UNESCO for financial support to conduct this survey. This survey would not have been possible without the unwavering commitment of the CSS Technical Committee, chaired by the Ministry of Education, Sport, Arts and Culture; field and data entry personnel and the patience and cooperation of respondents.

M. Dzinotizei
Director-General, ZIMSTAT

F. Mpfunya
Executive Director, Culture Fund

[1]*Baseline survey on the Culture Sector in Zimbabwe, 2009*

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KEY TERMS AND DEFINITIONS

1. **Applied Arts:** These are works that have a functional component such as architecture, ceramics, textile, furniture and fashion design and are generally not mass-produced.

2. **Copyright:** Copyright is a generic term used to describe a collection of rights given by law to the creator of an original literary, dramatic, artistic or musical work to control the use of his works. This is a form of protection provided to the authors of “original works of authorship” including literary, dramatic, musical, artistic, and certain other intellectual works, both published and unpublished. A copyright provides the author the exclusive right to reproduce or sell the work.

3. **Crafts:** Visual art forms that focus on the creation of works, which have historically been utilitarian in nature but has assumed an aesthetic value lending economic value e.g. basketry, crocheting, beadwork and pottery.

4. **Cultural Agents:** These are persons working in the field of culture, including creators, performers, administrators and professionals associated with such cultural activities as audio, visual arts, crafts, the performing arts, publishing, the cultural heritage and cultural tourism.

5. **Cultural Diversity:** Refers to the many ways in which the different cultures of groups and societies find expression. These cultural expressions are passed on within and among groups and societies, and from generation to generation. Cultural diversity, however, is evident not only in the varied ways in which cultural heritage is expressed, augmented and transmitted but also in the different modes of artistic creation, production, dissemination, distribution and enjoyment, whatever the means and technologies that are used.

6. **Cultural Domain:** A Cultural domain is a common set of culturally productive industries, activities and practices that are grouped, according to the 2009 UNESCO Framework for Statistics, under Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audio-Visual and Interactive Media, Design and Creative Services and Intangible Cultural Heritage (Transversal Domain)

7. **Cultural Industries:** Consist of kind-of-activity units engaged in the production, whether for sale, consumption or enjoyment, of cultural goods and services – i.e. which seek to educate, inform and entertain with messages, symbols, information or moral and aesthetic values of a given people or society.

8. **Culture:** It is the totality of a people’s way of life, the whole complex of distinctive spiritual material, intellectual and emotional features that characterise a society or social group and includes not only arts and literature, but also modes of life, the fundamental rights of the human being, value systems and traditions and beliefs.

9. **Culture Cycle:** Refers to the production of culture as a result of a series of interlinked processes or stages that together form the culture cycle, value chain or supply chain.

10. **Culture Sector:** The culture sector is the totality of activities in production, distribution and promotion of goods and services that define the national culture.

11. **Film:** It comprises motion pictures, video and cinematography.

12. **Fine Arts:** Visual art expression that is a conveyance of images and ideas that the artist has created in order to stimulate an emotional response from the viewer. Encompasses painting, sculpture, photography, drawing and graphic design.

13. **Intangible Cultural Heritage (ICH):** Is defined as the practices, representations, expressions, knowledge, skills – as well as the instruments, objects, artifacts and cultural spaces associated therewith – that communities, groups and, in some cases, individual artists recognise as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment, their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity.

14. **Literary Arts:** Artistic works that include prose, drama and poetry.

15. **Natural Heritage:** It consists of natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value.

16. **Performing Arts and Celebrations:** Refers to professional or amateur performing arts activities, such as choreography, plays, theatre, dance, opera and puppetry, as well as the celebration of cultural events (festivals, feasts and fairs), which occur locally and can be informal in nature.

KEY TERMS AND DEFINITIONS(continued)

17. Registration and Licensing: For the purposes of this survey, the type of registration was not only confined to Registrar of Companies but also from various regulatory authorities in the Cultural Industry who keep registers or license institutions and/ or individual artists such as Registrar of deeds, NACZ, ZIMURA and Local Authorities. This is because the industry is characterized by both individual artists and institutions.

The National Arts Council of Zimbabwe was established through an Act of Parliament (NACZ Act 1985) with the objective of developing and improving the knowledge of understanding and practice of the arts in the country. The other objective was to provide for the registration and regulation of arts organizations. The NACZ registers Arts Associations and Promoters only. The arts include music, dance, drama, folk, art, creative writing, painting, photography, film, sculpture, craft, graphic or plastic arts, and any other form of culture

The Zimbabwe Music Rights Association is a registered collecting society established according to the provisions of the Copyright and Neighbouring Rights Act which registers music authors, composers and publishers in the country. Any author or composer of music becomes a member of ZIMURA by virtue of registering his or her work with the society.

18. Royalties: Are sums paid to a creator or a participant in an artistic work, based on individual sales of the work. In order to receive royalties, the work must generally receive a copyright or patent. This can be defined as payments or reward due to people who have created something and own certain rights therein. It can be simply referred to as compensation for the usage of the 'creation' by others.

19. Sport: Sport, Physical and Recreation consists of companies and individual artists mainly engaged in the presentation or provision of sports and physical recreation and associated services. Coaching and education services related to sports and physical recreation are included. Also included are business units, which manufacture, wholesale or retail sports and physical recreation goods. From the point of view of science, conservation or natural beauty, it includes nature parks and reserves, zoos, aquaria and botanical gardens.

20. Traditional/Indigenous Knowledge: Refers to the knowledge, innovations and practices of indigenous and local communities around the world. Developed from experience gained over the centuries and adapted to the local culture and environment, traditional knowledge is transmitted orally from generation to generation. It tends to be collectively owned and takes the form of stories, songs, folklore, proverbs, cultural values, beliefs, rituals, community laws, local language and agricultural practices, including the development of plant species and animal breeds. Traditional knowledge is mainly of a practical nature, particularly in such fields as agriculture, fisheries, health, horticulture, forestry and environmental management in general (SCBD, 2007).

LIST OF ACRONYMS

AIDS	Acquired Immune Deficiency Syndrome
ARLAC	African Regional Labour Administration Centre
BEC	Broad Economic Category
CPC	Cultural Product Classification
CSS	Cultural Statistics Survey
EU	European Union
FCS	Framework for Cultural Statistics
GDP	Gross Domestic Product
HIFA	Harare International Festival of the Arts
HIV	Human Immunodeficiency Virus
HS	Harmonised Stystem
ICH	Intangible Cultural Heritage
ICT	Information Communication Technology
ISIC	International Standard Industrial Classification
ITC	International Trade Center
LFCLS	Labour Force and Child Labour Survey
NACZ	National Arts Council of Zimbabwe
NGO	Non-Governmental Organisation
NMMZ	National Museums and Monuments of Zimbabwe
SADC	Southern African Development Community
SCBD	Secretariat of the Convention on Biological Diversity
Sida	Swedish International Development Agency
SITC	Standard Industrial Trade Classification
SMT	Survey Management Team
SPSS	Statistical Package for Social Scientists
UNESCO	United Nations Educational, Scientific and Cultural Organisation
USA	United States of America
USD	United States Dollar
UZ	University of Zimbabwe
WIPO	World Intellectual Property Organisation
ZIMRA	Zimbabwe Revenue Authority
ZIMSTAT	Zimbabwe National Statistics Agency
ZIMURA	Zimbabwe Music Rights Association
ZMS02	Zimbabwe Master Sample 2002

EXECUTIVE SUMMARY

The Cultural Statistics Survey (CSS) was conducted under the direction of the Zimbabwe National Statistics Agency (ZIMSTAT) which was commissioned by the Culture Fund of Zimbabwe Trust through the Ministry of Education, Sport, Arts and Culture. The survey was made possible with the financial assistance from the United Nations Educational, Scientific and Cultural Organisation (UNESCO) Diversity Fund under the UNESCO 2005 Convention.

The survey was spearheaded by a Technical Committee chaired by the Ministry of Education, Sport, Arts and Culture. The main objective of the survey was to measure the economic and social contribution of cultural industries to the economy.

The individual artists and institutions who participated in this survey were drawn from the registers compiled by the Zimbabwe Music Rights Association (ZIMURA), Zimbabwe Writers Association, National Gallery of Zimbabwe and the 2011 directory developed by the National Arts Council of Zimbabwe (NACZ). The survey successfully interviewed 734 individual artists and 99 institutions in the cultural industry in Harare and its major surrounding areas (Chitungwiza, Norton, Ruwa and Epworth). The questionnaires sought information on Employment, Education, Training, Finance, Funding, Marketing, Technology and Constraints faced by individual artists and institutions.

The survey was conducted using the 2009 UNESCO Framework for Cultural Statistics (FCS). The FCS is a tool for organizing cultural statistics both nationally and internationally. It is based on a conceptual framework and common understanding of culture that enables the measurement of a wide range of particular economic and social mode of cultural production. Further, its standard definitions allow for the production of internationally comparable data.

The framework categorises cultural activities into eight domains. For the purposes of CSS Zimbabwe 2012 the following domains were focused upon: Performance and Celebration; Visual Arts and Crafts; Literary Arts & Publishing (Books and Press); Film, Audio-visual and Interactive Media; Design and Creative Services. The attention of the survey was on the "cultural and creative industries" and this precludes the following domains: Cultural and Natural Heritage, Sports and Recreation as well as Tourism.

The analysis of the findings accepts gross domestic product as given and does not generalize at a national level. At the level of employment and trade analysis, a national deduction can be arrived at. Notwithstanding the aforementioned, the results of the CSS Zimbabwe 2012 can be reliably used as pointers to the cultural industry's contribution to the economy.

Key Findings

In reading the results, it is important to note that an individual artist or institution may be taking part in several activities, for example, an artist can be a composer, a designer, and a sculptor. Hence, the percentage of certain questions may exceed a hundred.

Distribution of Individual Artists and Institutions

Of the individual artists interviewed, 72 percent indicated that they were in the Performance and Celebrations Domain while 30 percent were in the Visual Arts and Crafts Domain. Slightly above 6 percent were in the Film, Audio-Visual and Interactive Media, 5 percent were in the Literary Arts and Publishing and 3 percent were in the Design and Creative Services Domain.

Unlike with the individual artists, the distribution of institutions was not clustered in one domain. For institutions, 36 percent were in the Film, Audio-Visual and Interactive Media Domain, 35 percent were in Visual Arts and Crafts, 34 percent were in the Performance and Celebrations, 31 percent were in the Literary Arts and Publishing domain, 14 percent were in the Design and Creative Services domain and 10 percent were in the Tourism domain.

EXECUTIVE SUMMARY (continued)

Place of Operation

The results for the Performance and Celebrations domain show that the highest number of individual artists (36.8 percent) worked from a fixed building or location, followed by those who operated from their own households (27.5 percent) and those who had no fixed location (23.5 percent). The largest number of individual artists in the Visual Arts domain (43 percent) operated from markets, followed by 21 percent who operated from fixed locations or buildings, and then those who worked from their own homes (20 percent). Of those who were in the Literary Arts and Publishing domain, 45 percent operated from their own homes, followed by 33 percent who operated from fixed locations or buildings, and 15 percent who operated from no fixed locations. The highest number of individual artists in the Film, Audio-Visual and Interactive Media (51 percent) operated from fixed locations or buildings whilst 29 percent operated from their own households and 13 percent operated from other people's homes.
Fifty-two percent of those in the Design and Creative Services domain operated from fixed locations or buildings whilst 19 percent each operated from their own homes and had no fixed location.

Registration and Licensing Status

The results show that 76 percent of the individual artists who were in the Performance and Celebrations domain were registered only, 17 percent were registered and licensed and six percent were neither registered nor licensed. Forty-nine percent of the individual artists in the Visual Arts domain were neither registered nor licensed, 37 percent were registered only and 11 percent were registered and licensed.
In the Literary Arts and Publishing domain, 63 percent of the individual artists were registered whilst 35 percent were neither registered nor licensed. Three out of every five individual artists in the Film, Audio-Visual and Interactive Media domain were registered only, 24 percent were neither registered nor licensed and 16 percent were registered and licensed. Fifty-seven percent of individual artists in the Design and Creative Services domain were registered only whilst 38 percent were neither registered nor licensed.
Individual artists in the cultural industry who were neither registered nor licensed were asked to provide reasons for not registering or being licensed. Almost 48 percent of the individual artists indicated that they did not know how or where to register. Twenty-one percent of the individual artists reported that they could not afford the costs of registering.

Distribution of Artists by Institutional Sector

A majority of the individual artists interviewed across all domains were in the private sector, ranging from 76 percent (Visual Arts and Crafts) to around 86 percent in the Design and Creative Services domain.

Distribution of Institutions by Ownership

Amongst institutions interviewed from the Performance and Celebrations domain, 29 percent were operating as Companies. For institutions interviewed from the Visual Arts and Crafts domain, 26 percent were Sole proprietors. In the Literary Arts and Publishing domain, 32 percent were operating as Companies. Around 22 percent of the institutions in the Film, Audio-Visual and Interactive Media domain were operating as NGO's. Amongst institutions that were interviewed from the Design and Creative Services domain, 29 percent were Associations.

EXECUTIVE SUMMARY (continued)

Identified Needs for Artists

Of the individual artists in the Performance and Celebrations domain, about 56 percent indicated that their main need was funding whilst 16 percent cited marketing. Slightly below half (48 percent) of the individuals in the Visual Arts and Crafts domain indicated that they needed help in obtaining funding while about 28 percent needed help with the marketing of their products.

Employment

In general, the majority of the individual artists were in full-time employment. Amongst those who were interviewed from the Performance and Celebrations domain, close to 65 percent were full-time employees of whom 51 percent were male and 13 percent were female. Of those who were interviewed under the Visual Arts and Crafts domain, about 67 percent were full-time employees of whom 60 percent were male and 7 percent were female. Amongst those interviewed from the Literary Arts and Publishing domain, 54 percent were full-time employees with male employees contributing about 40 percent while female employees contributed almost 14 percent. Slightly over 47 percent of those who were interviewed from the Film, Audio-Visual and Interactive Media domain were doing their business full-time. Close to 53 percent were doing their business on a part- time basis. Amongst the respondents interviewed from the Design and Creative Services domain, 53 percent were employed on a part-time basis.
For all institutions in the cultural industry, a majority of their employees were employed on a full-time basis.

CHAPTER 1: INTRODUCTION

This introductory chapter covers the background to and objectives of the Cultural Statistics Survey (CSS). It also highlights the content of this report.

1.1. BACKGROUND

The culture sector in Zimbabwe is the summative total of activities in production, distribution and promotion of goods and services that define the national culture[2]. According to UNESCO, culture refers to "the totality of a people's way of life, the whole complex of distinctive spiritual, material, intellectual and emotional features that characterise a society or social group, and includes not only arts and letters, but also modes of life, the fundamental rights of the human being, value systems, traditions and belliefs"[3].

The culture sector in Zimbabwe has an enormous potential for contributing to both national and household income from local and export sale of various goods and services. A baseline survey conducted in 2009 by the Culture Fund of Zimbabwe Trust concluded that data and information on the cultural industry is poorly documented due to lack of a centralized information and knowledge management system[4]. To address the gap, the Culture Fund, through the Ministry of Education, Sport, Arts and Culture commissioned ZIMSTAT to conduct a Cultural Statistical Survey (CSS) that initiated the process for the identification, collation and dissemination of statistical data on the cultural industries of Zimbabwe. The CSS was conducted in Harare and its major surrounding areas (Ruwa, Epworth, Norton and Chitungwiza) using the 2009 UNESCO's Framework for Cultural Statistics (FCS) as a basis.

The definition of a cultural domain may begin with a number of industries (commonly termed collectively as cultural industries) since these can be formally defined using existing international classifications. A domain can also include all cultural activities under the appropriate heading, including informal and social activities. From the perspective of the framework, a domain includes all related activities, whether economic or social. The following are the 2009 UNESCO FCS cultural domains:

A. Cultural and Natural Heritage
B. Performance and Celebration
C. Visual Arts and Crafts
D. Literary Arts & Publishing (Books and Press)
E. Film, Audio-visual and Interactive Media
F. Design and Creative Services
G. Tourism
H. Sports and Recreation

Of these domains, the survey excluded Cultural and Natural Heritage and Sports and Recreation.

In preparation for the survey, Culture Fund and ZIMSTAT organized a stakeholders' consultative workshop to adapt the survey questionnaire and formulate the survey committee in Harare on the 2nd of May 2012. A Technical Committee tasked to provide technical input from questionnaire design to the dissemination of the results was formed during the workshop. The workshop programme included culture statistics survey orientation, draft questionnaire presentation, Technical Committee composition and its Terms of Reference and the way forward. The workshop was attended by forty-nine participants drawn from selected key line ministries, artists, writers, musicians, Culture Fund and ZIMSTAT.

The survey field staff was drawn from ZIMSTAT and Ministry of Education, Sport, Arts and Culture as shown in Appendix 1.

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[2] *Cultural Policy of Zimbabwe, 2007*

[3] *1982 UNESCO World Conference on Cultural Policies.*

[4] *Baseline Survey on the Cultural Sector in Zimbabwe, 2009*

1.2. SURVEY OBJECTIVES

The major objectives of the survey were to:
- Quantify and analyse the economic contribution of cultural industries in Zimbabwe.
- Inform the formulation of appropriate policy, strategy and institutional interventions for encouraging the development and growth of cultural industries in Zimbabwe.

CHAPTER 2: METHODOLOGY

This chapter covers information on sample design and coverage, questionnaire content, the pre-test, training, publicity, fieldwork, supervision, data processing, quality control and survey limitations.

2.1 SURVEY DESIGN AND COVERAGE

The Cultural Statistics Survey covered registered and unregistered individual artists and institutions that were resident in Zimbabwe and engaged in cultural activities in Harare and its major surrounding areas i.e. Ruwa, Epworth, Norton and Chitungwiza. The individual artists included bands, groups and individual persons. Institutions included all the organizations involved in the works of art in the sampled areas. The respondents who participated in this survey were drawn from the registers compiled by ZIMURA, National Gallery Zimbabwe and the 2011 arts directory developed by NACZ. Individual artists and institutions in these areas but were not on the list were identified and interviewed.

2.2 QUESTIONNAIRES

Two questionnaires were administered during the survey; one for individual artists and the other for institutions. See Appendix 2 for the questionnaires. Data collection for individual artist was conducted using face to face interviews whilst institutional questionnaires were completed by respondents. The questionnaire for institutions collected almost similar information as in the individual questionnaire.

The questionnaires collected information on the following areas:

A. Identification;
B. General Information;
C. Employment;
D. Education and training;
E. Funding and Marketing;
F. Technology and Constraints

The survey was conducted in predominantly ChiShona speaking areas, hence, the questionnaire for individual artists was translated from English into ChiShona.

2.3 PRE-TEST

A total of 18 participants attended the pre-test training workshop. There were 5 female and 13 male who were drawn from ZIMSTAT and other Technical Committee members. The training was conducted by ZIMSTAT. Three days of training were allocated for theory and two days for field practice.

The pre-test of the survey instruments was conducted in Masvingo from 16 to 20 July, 2012. During the pre-test, the individual and institutional questionnaires were administered to individual artists or institutions in the Performance and Celebrations, Visual Arts and Crafts and Literary Arts and Publishing domains. The pre-test was conducted to test the entirety of the survey procedures. Based on the results of the pre-test, further modifications were made to the wording and flow of the questionnaires.

2.4 TRAINING OF ENUMERATORS

The training of enumerators was held in Harare from 21 to 28 September 2012. The training workshop was attended by 50 participants, of whom 22 were female and 28 were male. The participants were drawn from the Ministry of Education, Sport, Arts and Culture and its parastatals; representatives of artists; ZIMURA; Culture Fund and ZIMSTAT. The training consisted of theory, class exercises and a test to ensure understanding of the survey instruments. Trainees spent three days conducting fieldwork practice in Bindura.

2.5 PUBLICITY

The publicity for the CSS was done to ensure that potential respondents understood the objectives of the survey. It also highlighted the need for all respondents to contribute willingly and honestly without fear of the information being used for anything else other than statistical purposes. The publicity for the CSS was done through articles in the print and electronic media and distribution of a bulk short message service to all artists who were in the list and registers used during the survey. A pamphlet was distributed during the stakeholders' workshop as part of publicity. In addition, t-shirts and caps were also used for publicity.

2.6 FIELDWORK

The data collection was carried from 1 to 14 October 2012 by five mobile teams, with each consisting of a Team Leader, five interviewers and a driver. Institutional questionnaires were dispatched concurrently with the making of appointments for individual interviews. During the individual interviews, other artists who were not on the provided list were identified.

2.7 SUPERVISION

The quality of training accompanied by the amount of supervision given to interviewers during fieldwork can to a greater extent influence the quality of data collected. Team Leaders were the primary link between the Supervisors and the Interviewers and were responsible for allocating work to the Interviewers, editing questionnaires and attending to problems in the field. The Technical Committee members were the supervisors in the field and their responsibilities included publicizing the survey, supervising Team Leaders and attending to field problems. Team Leaders were required to submit supervision reports.

2.8 DATA PROCESSING

Data processing started on 29 October 2012 and ended on 7 December 2012. The process involved training, data editing, entry, cleaning and tabulation. Data were captured using the Census and Survey Processing System (CSPro). All questionnaires were double entered and a member of the SMT performed internal consistency checks, as a secondary editor. The individual who rectified queries during data entry was a member of the Technical Committee who was knowledgeable about the questionnaires. Data were analyzed using the Statistical Analysis Software (SAS).

2.9 QUALITY CONTROL

Various quality control measures were put in place to ensure collection and dissemination of high quality data. Some of the controls included:

Training: All interviewers were trained at one central location and this ensured that the same information and understanding of the survey objectives, instruments and data collection operations were shared amongst them resulting in consistency of definitions thus ensuring collection of reliable information.

Field Teams supervision: The quality of data obtained during data collection to a greater extent depends on the quality of training and amount of supervision done during data collection. Supervision of interviewers was carried out from the onset of data collection to ensure standard understanding of questionnaires. The survey supervisory team consisted of Technical Committee members and Team Leaders. Team Leaders checked the questionnaires in the field for completeness, accuracy and consistency and requested the interviewers to do any necessary call backs. The Technical Committee members randomly checked Team Leaders' work and observed some interviews as quality control measures.

Data Processing: In order to ensure quality control, all questionnaires were double entered and the Technical Committee as secondary editors complemented the efforts of the data entry supervisors to perform internal consistency checks. In addition, the data was cleaned throughout the process, including checking of the tables for consistency and accuracy before the final tables were produced.

2.10 SURVEY LIMITATIONS

The CSS was constrained by the following factors:

1. The survey could not estimate the contribution of the cultural industry to the Gross Domestic Product (GDP) because of its limited geographic coverage.
2. The findings could not be generalised for the whole country because the sample was not nationally representative.
3. The registers and directory for artists used during the survey were not up to date.

In spite of these limitations, the findings give an indication of the performance of the sector. The report thus provides information to inform the programme management functions.

CHAPTER 3: LITERATURE REVIEW

This chapter details the quantitative findings from the 2011 Labour Force and Child Labour Survey (LFCLS) and the 2009 to 2012 Trade Statistics report compiled by ZIMSTAT. It reflects the performance of the cultural industry in terms of employment and the trade balance.

3.1 EMPLOYMENT IN THE CULTURE SECTOR

The Zimbabwe National Statistics Agency conducts a Labour Force and Child Labour Survey (LFCLS) after every five years, the latest one having been conducted in 2011. The 2011 LFCLS is a component of the National Household Surveys Capability Programme designed to monitor living conditions. The survey is a nationally representative sample survey meant to estimate the number of people classified according to their activity status; the size and characteristics of the economically active population, that is, the employed and the unemployed; informal sector employment and informal employment as some of its objectives. The survey therefore, focuses on social and economic characteristics in particular, status in employment, industry, occupation, place of work and social security.

From the 2011 LFCLS, the number of employees per sector can be estimated. However, for the culture sector estimates can only be made from those in direct cultural industries otherwise for those in indirect cultural industries it would require some satellite accounting to establish the figures. The figures reported in this section only cover those in direct cultural industries.

Table 3.1.1 shows the percent distribution of persons aged 15 years and above in the Culture sector from the 2011 LFCLS by cultural domain and sex as per the ISIC codes given in the 2009 UNESCO Framework Cultural Statistics on cultural domains. There were about 22 000 persons in the Culture sector according to the 2011 LFCLS. Close to 30 percent of the population were in the Performance and Celebration domain followed by those in the Books and Press at 28 percent. There were more male than female in the following domains; Performance and Celebrations, Books and Press and Audio Visual Interactive Media.

Table 3.1.1 : Percent Distribution of the Population in the Culture Sector in Zimbabwe by Domain, CSS Zimbabwe, 2012

Domains	Male	Female	Total
Performance and Celebration	30.7	28.2	29.8
Visual Arts and Crafts	8.9	10.4	9.4
Literary Arts and Publishing (Books and Press)	29.8	23.3	27.5
Audio Visual Interactive Media	19.6	13.3	17.3
Cultural and Natural Heritage	8.0	12.9	9.7
Design and Creative Services	3.0	12.0	6.2
Total Percent	**100**	**100**	**100**
Total Number	**14 366**	**7 922**	**22 288**

Table 3.1.2 below shows the percent distribution of persons aged 15 years and above in the Culture sector in the areas of Harare, Ruwa, Norton, Chitungwiza and Epworth from the 2011 LFCLS by cultural domain and sex as per the ISIC codes given in the 2009 UNESCO Framework Cultural Statistics on cultural domains.

The distribution of the population in the culture sector by type of cultural activity and sex is presented in Table 3.1.2 below. The majority was in the creative, arts and entertainment activities both as total (29.0 percent) and disaggregated by male (26.2 percent) and female (32.6 percent).

Table 3.1.2: Percent Distribution of the Population in the Culture Sector by Type of Cultural Activity, CSS Zimbabwe, 2012

Cultural Activity	Male	Female	Total
Retail Sale of books, newspapers and stationary	5.2	0.0	3.0
Sound recording and music publishing	0.0	4.3	1.9
Radio broadcasting	18.7	0.0	10.7
News agency activities	5.8	6.9	6.2
Other information service activities	38.0	7.4	24.8
Advertising	6.0	17.4	11.0
Creative, arts and entertainment activities	26.2	32.6	29.0
Botanical and zoological gardens	0.0	12.4	5.3
Gambling and betting activities	0.0	11.4	4.9
Activities of amusement parks and theme parks	0.0	7.6	3.3
Total Percent	**100**	**100**	**100**
Total Number	**7 199**	**5 465**	**12 664**

Source: LFCLS 2011

Of the 5.4 million people employed in Zimbabwe according to the 2011 LFCLS, just above 22 thousand persons were in direct cultural industries thus contributing at least 0.4 percent to national employment. For Harare, Chitungwiza, Norton, Epworth and Ruwa close to 13 thousand persons were in direct cultural industries contribution a proportion of 1.6 percent of the total employees in these areas.

3.2 TRADE (IMPORTS AND EXPORTS) OF CULTURAL PRODUCTS

Import and export data can be reported using mainly three classifications. The three are the Harmonized System (HS), the Standard Industrial Trade Classification (SITC), and the Broad Economic Categories (BEC). The classification that was used to analyze imports and exports in this report is the HS 2007. The period under review is the 2009 to 2012. The products covered are defined collectively as cultural products in the 2009 UNESCO FCS. A full list of products in each domain is in Appendix 3.

Imports

Table 3.2.1 show the distribution of imports of cultural products in six domains. The total imports rose from US$8.9 million in 2009 to US$37.3 million in 2012. The imports fell in 2011 and rose in 2012 to US$43.6 million. Generally, Performance and Celebration, Visual Arts and Crafts and Literary Arts and Publishing domains constituted large proportions of imports of cultural products.

Table 3.2.1: Imports of Cultural Products by Domain from 2009-2012, CSS Zimbabwe, 2012

	Year			
Domain	**2009**	**2010**	**2011**	**2012**
Cultural and Natural Heritage	57 515	26 993	46 761	91 909
Performance and Celebration	2 887 906	24 814 241	4 152 748	29 668 980
Visual Arts and Crafts	2 016 904	19 35 839	2 185 943	2 085 140
Literary Arts and Publishing	3 858 611	10 476 592	10 675 518	11 649 268
Film, Audio-Visual and Interactive Media	33 427	75 851	135 267	45 451
Design and Creative Services	1 056	7 955	83 149	11 452
Total	**8 855 419**	**37 337 471**	**17 279 386**	**43 552 200**

Source: ZIMSTAT

Exports

Table 3.2.2 show the distribution of exports of cultural products in six domains. The total exports declined between 2009 and 2011 and increased in 2012. The highest exports were recorded in 2009 (US$16.4 million). For the period under review, total exports for each year of cultural products contributed less than one percent to the value of total exports of all products. Generally, Cultural and Natural Heritage and Visual Arts and Crafts domains constituted the largest proportions of exports of cultural products.

Table 3.2.2: Exports of Cultural Products by Domain from 2009-2012, CSS Zimbabwe, 2012

	Year			
Domain	**2009**	**2010**	**2011**	**2012**
Cultural and Natural Heritage	14 216 902	10 220 808	8 400 962	10 733 149
Performance and Celebration	40 847	115 787	57 971	338 679
Visual Arts and Crafts	2 094 217	2 851 726	3 695 435	3 573 828
Literary Arts and Publishing	71 680	121 064	81 521	91 122
Film, Audio-Visual and Interactive Media	0	0	100	4 780
Design and Creative Services	0	0	940	0
Total	**16 423 646**	**13 309 384**	**12 236 929**	**14 741 558**
Total Exports (All Products)	**2 249 754 511**	**3 245 451 707**	**3 557 026 418**	**3 883 643 863**
Percent Share	**0.73**	**0.41**	**0.34**	**0.38**

Source: ZIMSTAT

Trade Balance

The trade balance is the difference between exports and imports. A negative trade balance was recorded for the period 2010 to 2012. In 2009, exports totaled US$16.4 million while imports were US$8.9 million implying a positive trade balance of over US$7.5 million. See Table 3.2.3 below.

Table 3.2.3: The Trade Balance for Works of Art 2009-2012, CSS Zimbabwe, 2012

Year	**2009**		**2010**		**2011**		**2012**	
HS \ Flow Type	Import	Exports	Import	Exports	Import	Exports	Import	Exports
Total (Million, USD)	8.9	16.4	37.3	13.3	17.3	12.2	43.6	14.7
Trade Balance	**7.5**		**-24**		**-5.1**		**-28.9**	

Source: ZIMSTAT

3.3 CONCLUSION

According to the 2011 LFCLS, close to 30 percent of the persons employed in the cultural industry were in the Performance and Celebration domain followed by those in the Literary Arts and Publishing domain at 28 percent. Twenty-nine percent of the persons employed in the cultural industry were engaged in creative, arts and entertainment activities. In terms of trade, Zimbabwe had a negative trade balance from 2010 to 2012.

CHAPTER 4: GENERAL SURVEY RESULTS

This chapter presents information on the survey response rate, the general status of the sector and the contribution of culture sector to Zimbabwe economy. The general status of the sector includes distribution of creative industries, place of operation, registration and licensing status, association and unionism, institutional sector, period of existence, business ownership and nationality, day to day activities, engagement in non-cultural activities obstacles to operations, development needs and technology and constraints.

4.1 RESPONSE RATE

The individual artists and institutions that participated in this survey were drawn from the NGZ, NACZ, ZWA and ZIMURA registers and directory. All artists and institutions resident in Harare and its surrounding areas were eligible for the survey. Efforts were made to reach out to all the individual artists and institutions in these areas.

The individual artist and institution coverage rates are shown in Table 4.1.1 below. A total of 734 individual artists and 99 institutions were successfully interviewed. The individual artist response rate was 71 percent while for the institutions it was 65 percent.

Table 4.1.1: Individual Artists and Institutions Response Rates, CSS Zimbabwe, 2012

Result	Individual Artists	Institutions	Total
Completed	734	99	833
Refused	18	8	26
Not Found	163	29	192
Postponed	65	37	102
Not Available/ Not Reachable	212	8	220
Total	**1 192**	**181**	**1 373**
Response Rate (percent)	**71.33**	**65.13**	**70.53**

4.2 GENERAL STATUS OF THE CULTURE SECTOR

As noted earlier in chapter one, the general status of the culture sector focused on all the 2009 UNESCO FCS domains save for the Cultural and Natural Heritage domain.

4.2.1 DISTRIBUTION OF CREATIVE INDUSTRIES

During the 2012 CSS, information on major business activities was sought from individual artists as well as institutions. Table 4.2.1 below shows the distribution of artists by domains found in the cultural industry. The question asked in the survey allowed for multiple responses to be obtained from respondents, hence, the results presented are for the frequency for which each domain was mentioned.

Of the individual artists interviewed, the majority, 72 percent indicated that they were in the Performance and Celebrations domain while 30 percent were in the Visual Arts and Crafts domain. Six percent each of the individual artists indicated that they were into Film, Audio-Visual and Interactive Media and Literary Arts and Publishing. Three percent were in the Design and Creative Services domain.

Unlike individual artists, the distribution of institutions was not clustered in one domain. For institutions, 36 percent were in the Film, Audio-Visual and Interactive Media Domain, 35 percent were in Visual Arts and Crafts, 34 percent were in the Performance and Celebrations, 31 percent were in the Literary Arts and Publishing domain, 14 percent were in the Design and Creative Services domain and 10 percent were in the Tourism domain.

Table 4.2.1: Percent Distribution of the Cultural Industries by Domain, CSS Zimbabwe, 2012

Domain	Individual Artists		Institutions	
	Number	Percent	Number	Percent
Performance and Celebrations	524	71.6	34	34.3
Visual Arts and Crafts	222	30.3	35	35.4
Literary Arts & Publishing	40	5.5	31	31.3
Film, Audio-Visual and Interactive Media	45	6.2	36	36.4
Design and Creative Services	21	2.9	14	14.1
Tourism (Related domain)	2	0.3	6	6.1
Sport and Recreation (Related domain)	0	0.0	4	4.0
Not Stated	0	0.0	1	1.0
Other	2	0.3	12	12.1

4.2.2 PLACE OF OPERATION

The distribution of individual artists in the various domains by their places of operation is presented in Table 4.2.2 below. The results for the Performance and Celebration domain show that the highest number of individual artists in the domain (36.8 percent) worked from a fixed building or location, followed by those who operated from their own households (27.5 percent) and those who had no fixed location (23.5 percent). The largest number of individual artists in the Visual Arts domain (43 percent) operated from markets, followed by 21 percent who operated from fixed locations or buildings, and then those who worked from their own households (20 percent).

Of those in the Literary Arts and Publishing domain, 45 percent operated from their own households, 33 percent operated from fixed locations or buildings, and 15 percent operated from no fixed locations. The highest number of individual artists in the Film, Audio-Visual and Interactive Media (51 percent) operated from fixed location or buildings whilst 29 percent operated from their own households and 13 percent operated from other people's households.

Fifty-two percent of those in the Design and Creative Services domain operated from fixed locations or buildings whilst 19 percent each operated from their own households and no fixed location.

Table 4.2.2: Percent Distribution of Individual Artists by Place of Operation and Domain, CSS Zimbabwe, 2012

Creative Industry	Footpath, Street Or Open Space	A Market	In (Name's) Household	In Someone Else's Household	Building/ Fixed Locatio	No Fixed Location	Other	Not Stated	Total	Total Number
Performance and Celebrations	1.3	1.3	27.5	9.0	36.8	23.5	0.4	0.2	100	524
Visual Arts	4.5	43.2	20.3	6.3	20.7	4.5	0.0	0.5	100	222
Literary Arts & Publishing	2.5	0.0	45.0	5.0	32.5	15.0	0.0	0.0	100	40
Film, Audio-Visual and Interactive Media	0.0	0.0	28.9	13.3	51.1	6.7	0.0	0.0	100	45
Design and Creative Services	0.0	9.5	19.1	0.0	52.4	19.1	0.0	0.0	100	21
Tourism (Related domain)	0.0	0.0	0.0	0.0	100.0	0.0	0.0	0.0	100	2
Other	0.0	0.0	50.0	0.0	50.0	0.0	0.0	0.0	100	2

4.2.3 REGISTRATION AND LICENSING STATUS

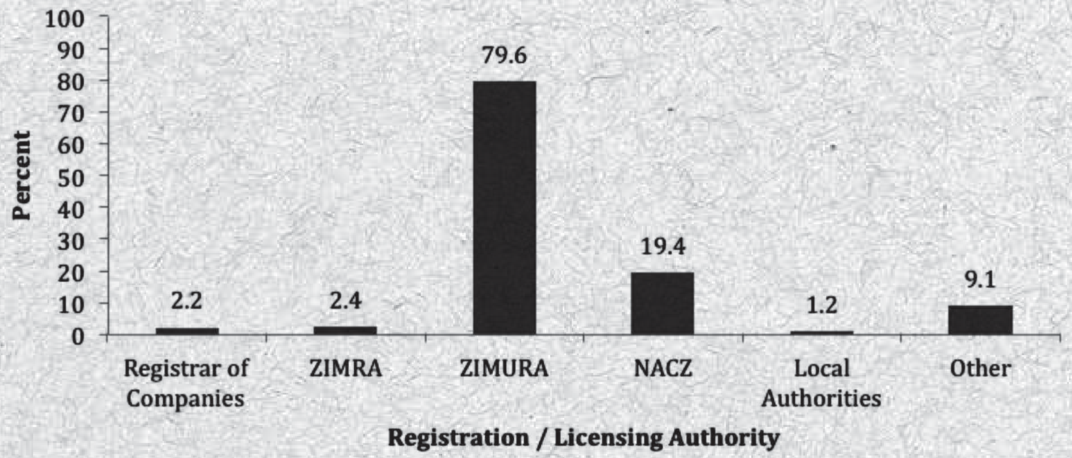
The distribution of individual artists in the various domains by registration and licensing status is presented in Table 4.2.3 below. The results show that 76 percent of the individual artists who were in the Performance and Celebrations domain were registered only, 17 percent were registered and licensed and six percent were neither registered nor licensed. Forty-nine percent of the individual artists in the Visual Arts domain were neither registered nor licensed, 37 percent were registered only and 11 percent were registered and licensed. In the Literary Arts and Publishing domain, 63 percent of the individual artists were registered whilst 35 percent were neither registered nor licensed.

Table 4.2.3: Percent Distribution of Individual Artists by Registration Status and Domain, CSS Zimbabwe, 2012

Domain	Registration Status					
	Registered only	Licensed only	Registered and Licensed	Neither Registered nor Licensed	Total Percent	Total Number
Performance and Celebrations	76.0	0.4	17.4	6.3	100	524
Visual Arts and Crafts	37.4	2.7	11.3	48.6	100	222
Literary Arts & Publishing	62.5	0.0	2.5	35.0	100	40
Film, Audio-Visual and Interactive Media	60.0	0.0	15.6	24.4	100	45
Design and Creative Services	57.1	0.0	4.8	38.1	100	21
Tourism (Related domain)	100.0	0.0	0.0	0.0	100	2
Other	100.0	0.0	0.0	0.0	100	2

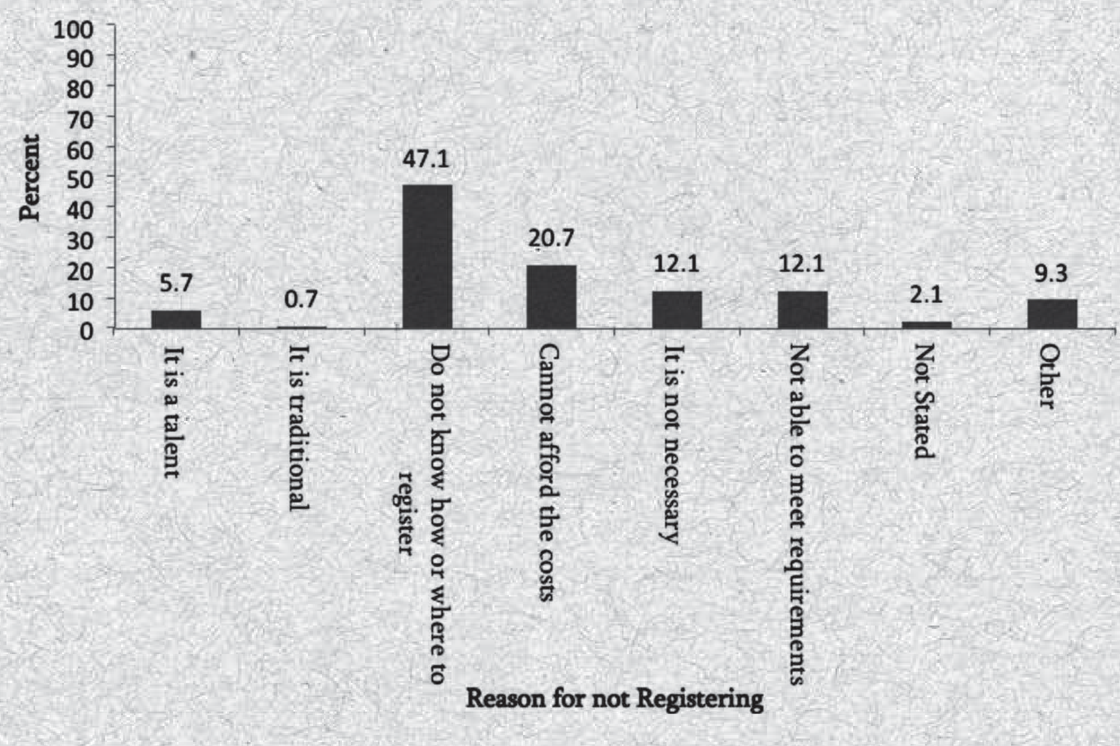
An analysis of the state of the registration and licensing of individual artists in the cultural industry by organisation is presented in Figure 4.2.1 below. Almost four-fifths (79.6 percent) of the individual artists in the cultural industry indicated that they were registered with ZIMURA, the body that registers music composers only. The National Arts Council of Zimbabwe was cited by 19 percent of the individual artists in the cultural industry. Very few individual artists were registered with the Zimbabwe Revenue Authority (ZIMRA) and the Registrar of Companies.

Figure 4.2.1: Percent Distribution of Individual Artists by Registration or Licensing Authority, CSS Zimbabwe, 2012



Individual artists in the cultural industry who were neither registered nor licensed were asked to provide reasons for not registering or being licensed as presented in Figure 4.2.2. Proximately 47 percent of the individual artists indicated that they did not know how or where to register. Twenty-one percent of the individual artists reported that they could not afford the costs of registering.

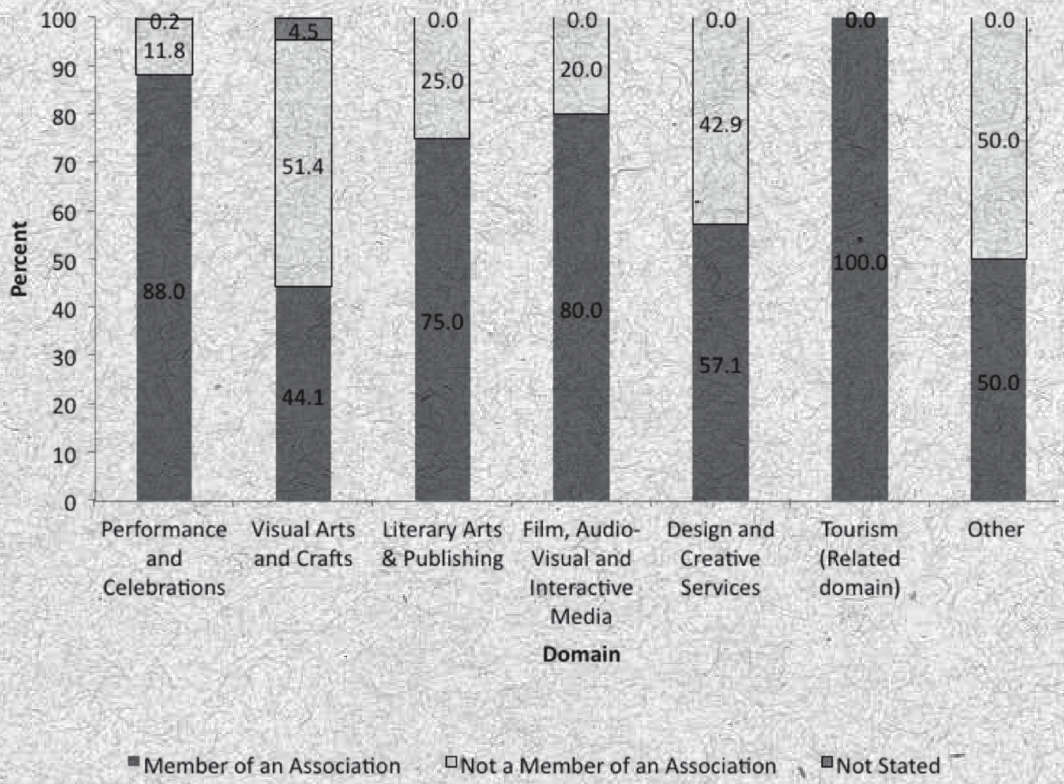
Figure 4.2.2: Percent Distribution of Individual Artists by Reason for Not Registering, CSS Zimbabwe, 2012



4.2.4 ASSOCIATION AND UNIONISM

In all the domains, at least half of the artists were members of an association except for the Visual Arts and Craft domain where 44 percent were members while 51 percent were not as shown in Figure 4.2.3 below.

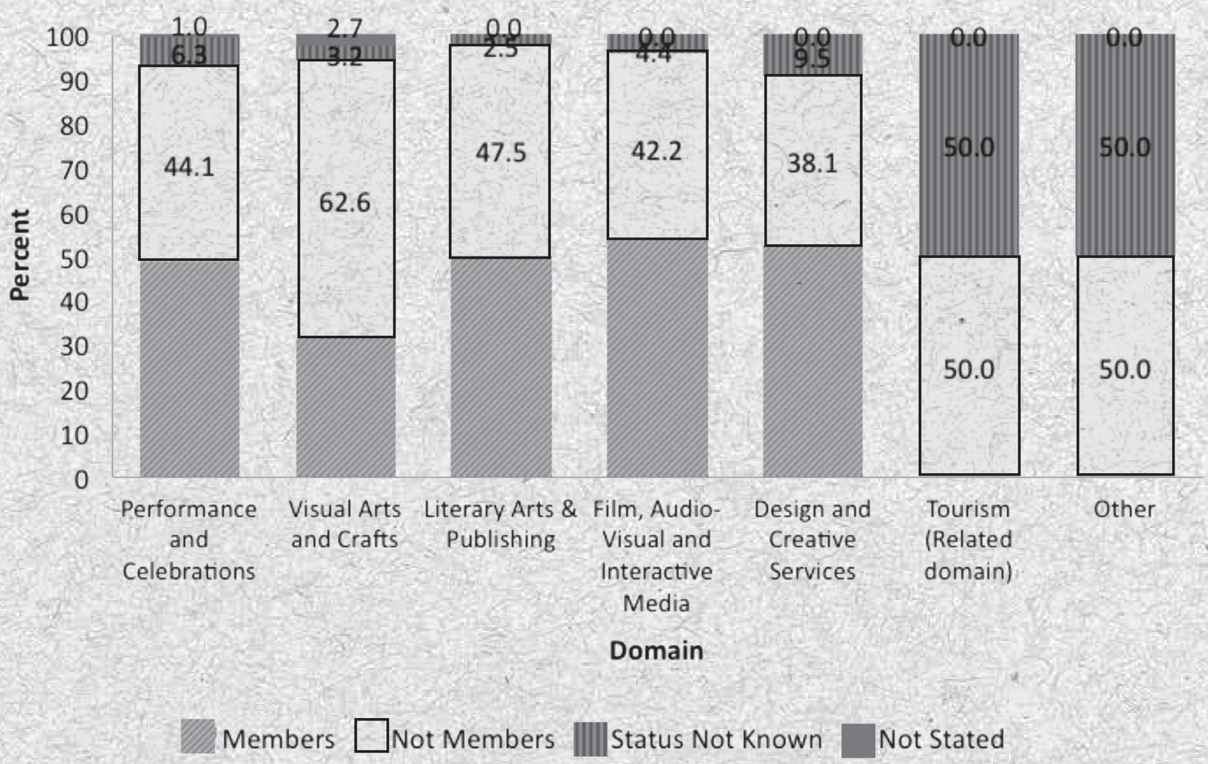
Figure 4.2.3: Percent Distribution of Individual Artists by Membership to an Association by Domain, CSS Zimbabwe, 2012



Association Membership Status of Employees

The Figure 4.2.4 below shows the distribution of individual artist by whether the majority of their employees were members of associations or not. Fifty percent of the individual artists in the Literary Arts and Publishing domain indicated that the majority of their employees were members of associations. Amongst individual artists who were in the Film, Audio-Visual and Interactive Media domain, 53 percent indicated that the majority of their employees were members of associations. Fifty-two percent of the individual artists in the Design and Creative Services domain indicated that the majority of their employees were members of associations. However, 63 percent of the individual artists in the Visual Arts and Crafts domain indicated that the majority of their employees were not members of associations.

Figure 4.2.4: Percent Distribution of Individual Artists by Membership of Employees to an Association and Domain, CSS Zimbabwe, 2012



4.2.5 INSTITUTIONAL SECTOR

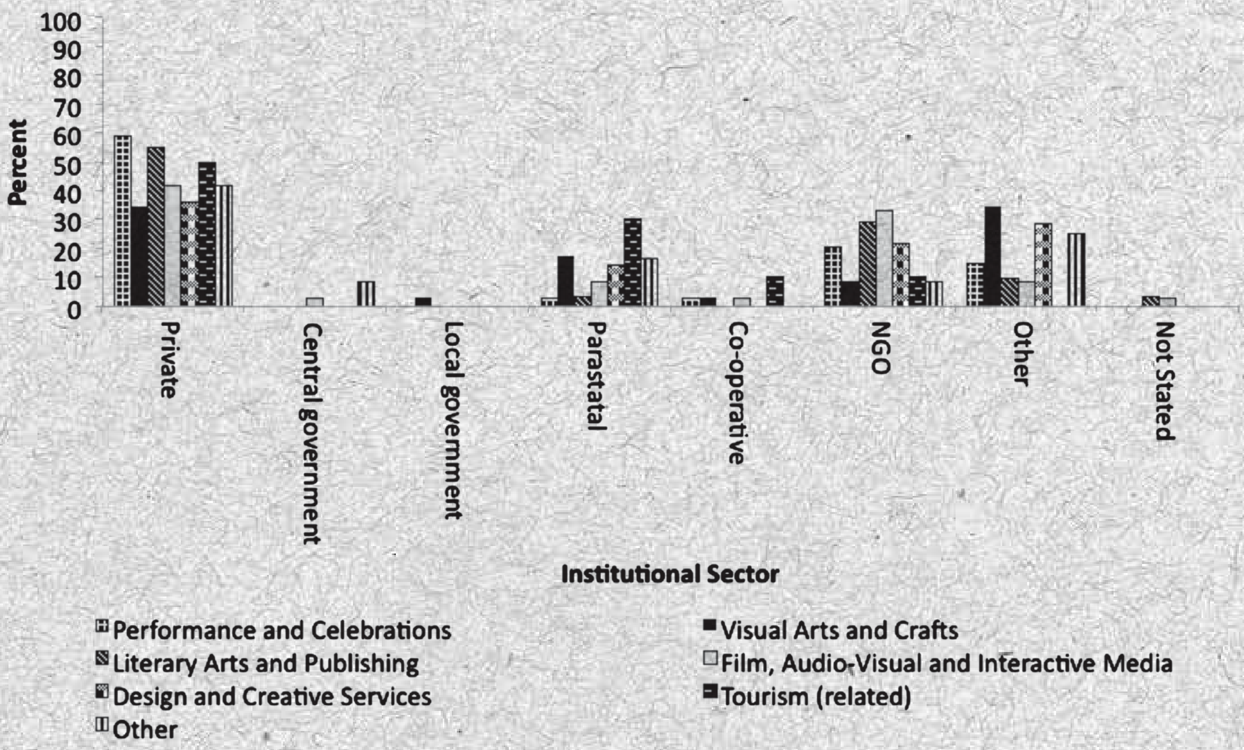
Table 4.2.4 presents the distribution of individual artists interviewed in the survey by their institutional sector. The majority of individual artists interviewed across all domains were in the private sector. Among those interviewed in the Performance and Celebrations domain, 82 percent were in the private sector and 11 percent were in private households. For those who were interviewed in the Visual Arts and Crafts domain, slightly above 76 percent were in the private sector and around 17 percent were in private households. Seventy-eight percent of those in the Literary Arts and Publishing domain were in the private sector while 10 percent were in private households. In the Film, Audio-Visual and Interactive Media domain, 80 percent were in the private sector while slightly above 11 percent were in private households. Around 86 percent of artists in the Design and Creative Services domain were in the private sector.

Table 4.2.4: Percent Distribution of Individual Artists Interviewed in the Culture Sector by Institutional Sector, CSS Zimbabwe, 2012

Domain	Institutional Sector					
	Private	Private Households	Co-operative	NGO	Other	Not Stated
Performance and Celebrations	81.7	10.9	5.9	1.2	0.2	0.2
Visual Arts and Crafts	76.1	17.1	5.9	0.5	0.0	0.5
Literary Arts & Publishing	77.5	10.0	5.0	7.5	0.0	0.0
Film, Audio-Visual and Interactive Media	80.0	11.1	8.9	0.0	0.0	0.0
Design and Creative Services	85.7	9.5	4.8	0.0	0.0	0.0

Figure 4.2.5 below presents the distribution of institutions in the cultural industry by institutional sector. Across all domains, the majority of institutions interviewed were in the private sector. The Performance and Celebrations domain had around 69 percent in the private sector while the Visual Arts and Crafts domain had just above 34 percent. The Literary Arts and Publishing domain had around 55 percent. The Film, Audio-Visual and Interactive Media had close to 42 percent of institutions. Amongst institutions that were interviewed from the Design and Creative Services domain, 36 percent were in the private sector.

Figure 4.2.5: Percent Distribution of Institutions Interviewed by Institutional Sector, CSS Zimbabwe, 2012



4.2.6 PERIOD OF EXISTENCE

The results on the period of existence that individual artists have been in business are presented in Figure 4.2.6 below. Of the artists who were in the Performance and Celebrations domain, 32 percent had been in business for periods between11 and 20 years while 29 percent had been active for periods between 6 and 10 years. About 36 percent of individual artists in each of the domains of the Visual Arts and Crafts and Film, Audio-Visual and Interactive Media had been in business for periods between 11 and 20 years. Domains with the highest number of artists who have been in operation for a period less than one year were Literary Arts and Publishing and Design and Creative Services, each with five percent.

It is important to note that across all the domains, a majority of artists, i.e. at least 75 percent have been operating for a period of six or more years. This is an indicator of stability and sustainability within the cultural industry. The existence of few artists having operated for short periods indicates a lack of growth within the industry.

Figure 4.2.6: Percent Distribution of Individual Artists by Domain and Period of Existence, CSS Zimbabwe, 2012

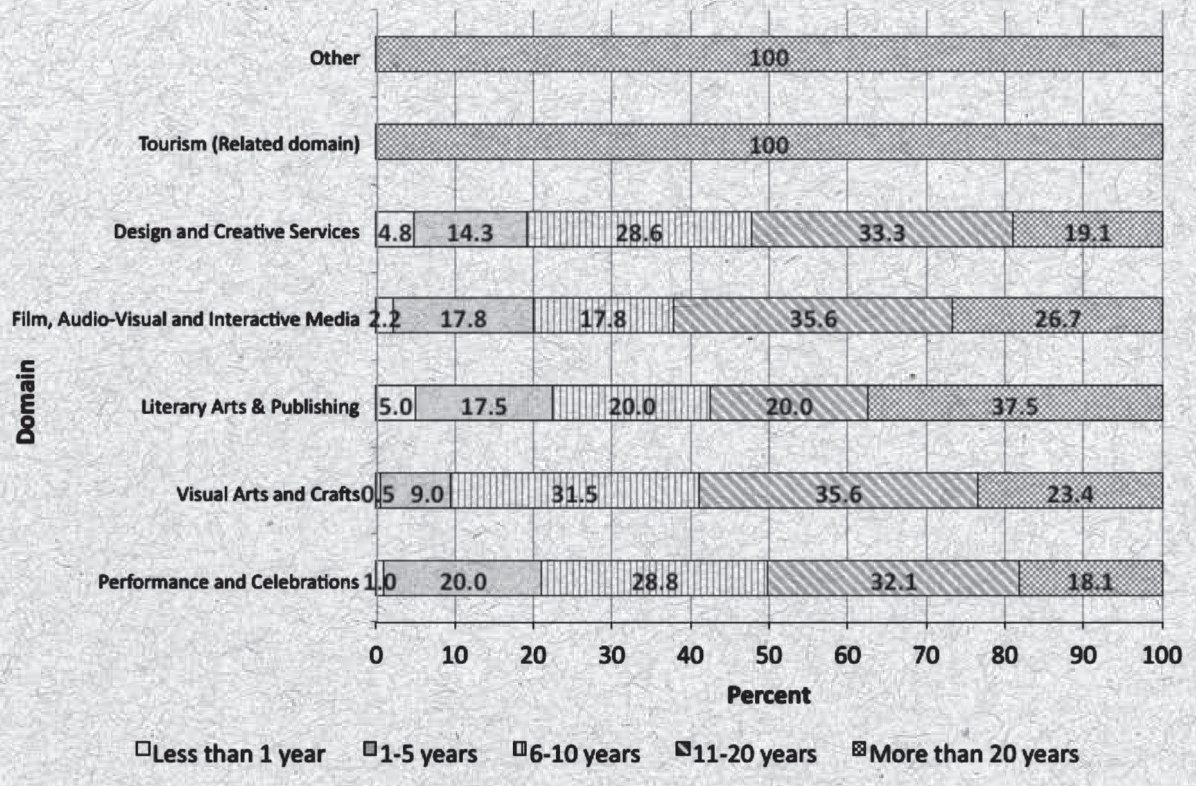


Table 4.2.5 below presents information on the distribution of institutions in the cultural industry by period of existence. Twenty-seven percent of the institutions in the Performance and Celebrations domain had been operating for periods between 11 and 20 years. Twenty-four percent each operated for periods between 1 and 5 years and 6 and 10 years. Domains with the highest proportions of institutions that operated for more than 20 years were Literary Arts and Publishing (42 percent) and Visual Arts and Crafts (37 percent). Across all industries, at least 70 percent of the institutions were found to have been operating for more than five years.

Table 4.2.5: Percent Distribution of Institutions in the Cultural industry by Domain and Period of Existence, CSS Zimbabwe, 2012

Creative Industry	Period of Existence						Total	
	Less than 1 Year	1-5 Years	6-10 Years	11-20 Years	More than 20 Years	Not Stated	Number	Percent
Performance and Celebrations	5.9	23.5	23.5	26.5	20.6	0.0	34	100
Visual Arts and Crafts	8.6	14.3	14.3	22.9	37.1	2.9	35	100
Literary Arts and Publishing	3.2	19.4	9.7	25.8	41.9	0.0	31	100
Film, Audio Visual and Interactive Media	11.1	13.9	11.1	27.8	33.3	2.8	36	100
Design and Creative Services	7.1	21.4	28.6	14.3	28.6	0.0	14	100
Tourism (Related domain)	0.0	20.0	10.0	20.0	50.0	0.0	10	100
Other	0.0	25.0	16.7	16.7	41.7	0.0	12	100

4.2.7 BUSINESS OWNERSHIP AND NATIONALITY

Business Ownership

The distribution of individual artists in the various domains by ownership of business is presented in Table 4.2.6 below. Eighty-two percent of individual artists in the Performance and Celebration domain owned the businesses, 11 percent were in partnership and five percent were in cooperatives. Eighty-nine percent of individual artists in the Visual Arts and Crafts domain owned the businesses and nine percent were in cooperatives. Ninety-five percent of individual artists in the Literary Arts and Publishing domain owned the businesses whilst three percent each were in associations or cooperatives.

Ninety-three percent and 95 percent of individual artists in the Film, Audio-Visual and Interactive Media and Design and Creative Services domains owned the businesses, respectively.

Table 4.2.6: Percent Distribution of Individual Artists by Business Ownership and Domain, CSS Zimbabwe, 2012

Domain	Self	P/ship	Co	Coop	Assoc	NGO	Other	Not Stated	Total Percent	Total Number
Performance and Celebrations	82.1	10.5	0.6	5.0	0.4	0.2	0.6	0.8	100	524
Visual Arts and Crafts	89.2	1.4	0.0	9.0	0.5	0.0	0.0	0.0	100	222
Literary Arts and Publishing	95.0	0.0	0.0	2.5	2.5	0.0	0.0	0.0	100	40
Film, Audio Visual and Interactive Media	93.3	2.2	2.2	2.2	0.0	0.0	0.0	0.0	100	45
Design and Creative Services	95.2	4.8	0.0	0.0	0.0	0.0	0.0	0.0	100	21
Tourism (Related domain)	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100	2
Other	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100	2

P/ship =Partnership, Co.= Company; Coop= Cooperative; Assoc=Association;

The distribution of institutions in the various domains by ownership of business is presented in Table 4.2.7 below. The results for the Performance and Celebration domain show that the highest number of institutions in the domain was companies (29 percent) followed by 24 percent Sole Proprietors and 18 percent NGOs. The highest number of institutions in the Visual Arts and Crafts domain (26 percent) was Sole Proprietors, followed by 20 percent that were Associations and 17 percent that were Parastatals.

Thirty- two percent of institutions in the Literary Arts and Publishing domain were companies, 23 percent were Associations and 13 percent each were NGOs and Sole Proprietors. Of the institutions that were in the Film, Audio-Visual and Interactive Media domain, 22 percent were NGOs, 16 percent each were Sole Proprietors and Associations and 14 percent were companies.

The highest number of institutions in the Design and Creative Services domain (29 percent) were Associations, followed by 21 percent that were Sole Proprietors and 14 percent each were NGOs and Parastatals. Thirty percent each of the institutions in the Tourism domain were Partners and Parastatals, 20 percent were companies and 10 percent were NGOs.

Table 4.2.7: Percent Distribution of Institutions by Business Ownership and Domain, CSS Zimbabwe, 2012

Domain	Self	P/ship	Co	Coop	Assoc	Gvt	Para	NGO	Other	Not Stated	Total Percent	Total Number
Performance and Celebrations	23.5	5.9	29.4	0.0	2.9	0.0	2.9	17.7	17.7	0.0	100	34
Visual Arts and Crafts	25.7	2.9	2.9	2.9	20.0	2.9	17.1	8.6	17.1	0.0	100	35
Literary Arts and Publishing	12.9	3.2	32.3	0.0	22.6	0.0	3.2	12.9	9.7	3.2	100	31
Film, Audio Visual and Interactive Media	16.7	8.3	13.9	0.0	16.7	5.6	5.6	22.2	8.3	2.8	100	36
Design and Creative Services	21.4	7.1	7.1	0.0	28.6	0.0	14.3	14.3	7.1	0.0	100	14
Tourism (Related domain)	10.0	30.0	20.0	0.0	0.0	0.0	30.0	10.0	0.0	0.0	100	10
Other	33.3	8.3	0.0	0.0	33.3	8.3	8.3	0.0	8.3	0.0	100	12

P/ship =Partnership, Co.= Company; coop= Cooperative; Assoc=Association; Gvt= Government; Para=Parastatal

Nationality

The distribution of individual artists in the various domains by nationality of principal or majority owner of business is presented in Table 4.2.8 below. The results show that 98 percent of individual artists who owned businesses in the Performance and Celebrations domain were Zimbabwean and about two percent were Other African. Ninety-six percent of individual artists who owned businesses in the Visual Arts domain were Zimbabwean whilst three percent were Other African and less than one percent were European. Zimbabweans were the only owners of businesses in the Literary Arts and Publishing, Film, Audio-Visual and Interactive Media and Design and Creative Services domains.

Table 4.2.8: Percent Distribution of Individual Artists by Nationality of the Principal/Majority Owner and Domain, CSS Zimbabwe, 2012

Domain	Zimbabwean	Other African	European	Other	Total	Total Number
Performance and Celebrations	98.3	1.5	0.0	0.20	100	524
Visual Arts and Crafts	96.4	3.2	0.5	0.00	100	222
Literary Arts and Publishing	100.0	0.0	0.0	0.00	100	40
Film, Audio Visual and Interactive Media	100.0	0.0	0.0	0.00	100	45
Design and Creative Services	100.0	0.0	0.0	0.00	100	21
Tourism (Related domain)	100.0	0.0	0.0	0.00	100	2
Other	100.0	0.0	0.0	0.00	100	2

The distribution of institutions in the various domains by nationality of principal or majority owner of business is presented in Table 4.2.9 below. The table shows that 94 percent of the institutions in the Performance and Celebrations and Visual Arts and Crafts domains were each owned by Zimbabweans. In each of these same domains, about three percent of the institutions were owned by Asians. Eighty-one percent of the institutions in the Literary Arts and Publishing domain were owned by Zimbabweans, 10 percent were owned by Europeans and three percent were owned by Other Africans.

In the Film, Audio-Visual and Interactive Media domain, 92 percent of the institutions were owned by Zimbabweans and close to three percent each were owned by Other Africans and Asians. Ninety-three percent of the institutions in the Design and Creative Services domain were owned by Zimbabweans and seven percent were owned by Other Africans whilst all the institutions in the Tourism domain were owned by Zimbabweans.

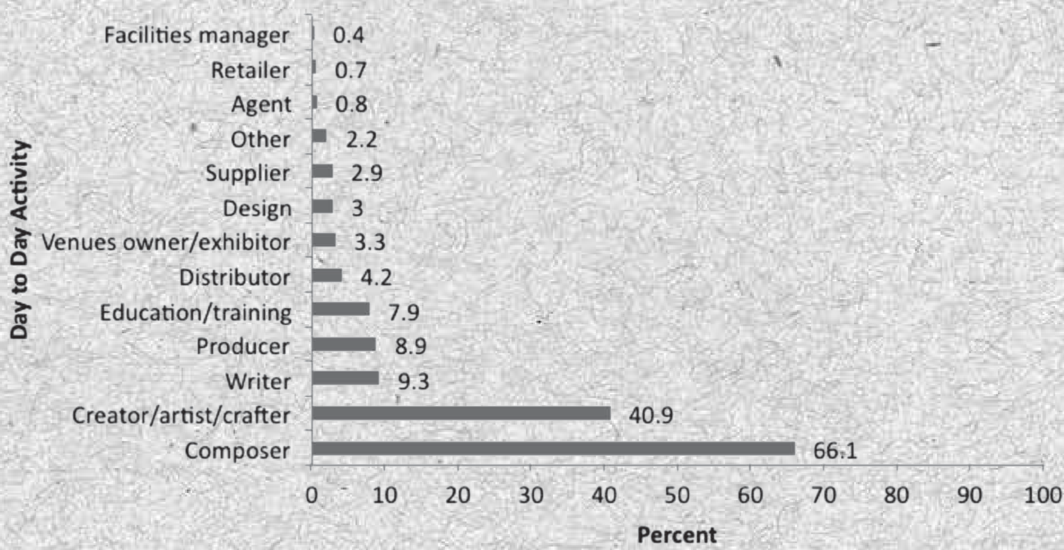
Table 4.2.9: Percent Distribution of Institutions by Nationality of the Principal/Majority Owner and Domain, CSS Zimbabwe, 2012

Creative Industry	Zimbabwean	Other African	Asian	European	Other	Total	Total Number
Performance and Celebrations	94.1	0.0	2.9	0.0	2.9	100	34
Visual Arts and Crafts	94.3	0.0	2.9	0.0	2.9	100	35
Literary Arts and Publishing	80.7	3.2	0.0	9.7	6.5	100	31
Film, Audio Visual and Interactive Media	91.7	2.8	2.8	0.0	2.8	100	36
Design and Creative Services	92.9	7.1	0.0	0.0	0.0	100	14
Tourism (Related domain)	100.0	0.0	0.0	0.0	0.0	100	10
Other	91.7	0.0	8.3	0.0	0.0	100	12

4.2.8 DAY TO DAY ACTIVITIES

Individual artists in the cultural industry were asked to indicate what they do on a day to day basis in relation to culture. The distribution of individual artists by day to day activity is presented in Figure 4.2.7 below. Sixty-six percent of the individual artists in the cultural industry indicated that they were composers. Forty-one percent were creator/artist/ crafters. Almost one in every ten of the individual artists interviewed indicated that they were writers.

Figure 4.2.7: Distribution of Individual Artists in the Cultural industry by Day to Day Activities, CSS Zimbabwe, 2012

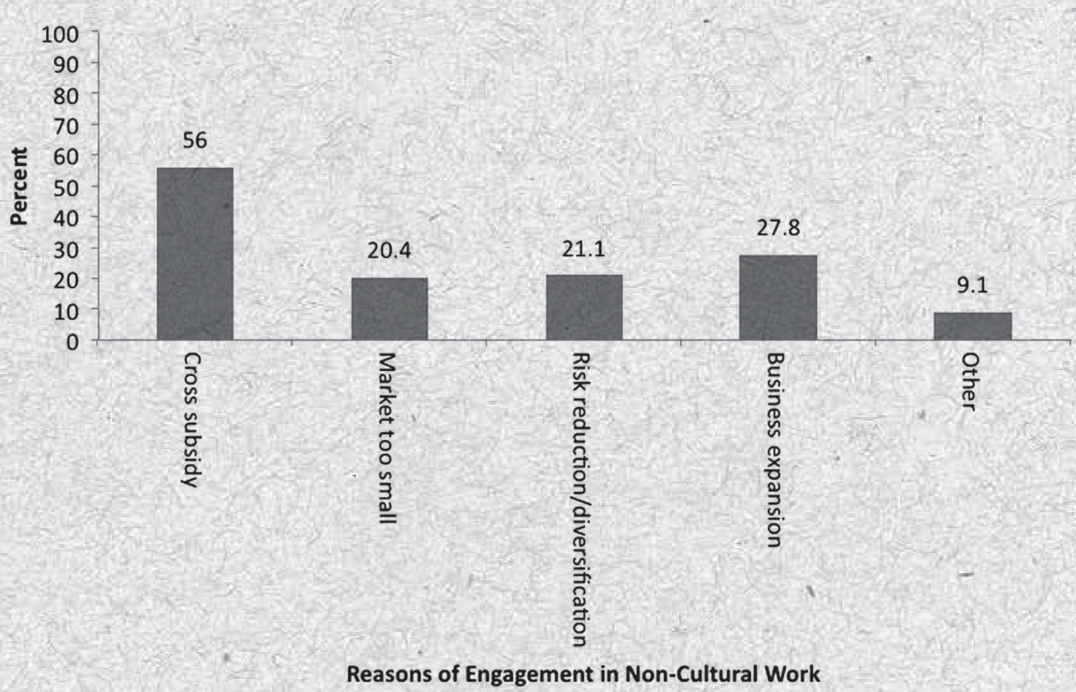


4.2.9 ENGAGEMENT IN NON CULTURAL ACTIVITIES

The CSS Zimbabwe, 2012 sought information on whether individual artists in the cultural industry were doing other work besides their 'creative' work. If an individual responded in the affirmative, an additional question was asked on the reasons for doing so.

As shown in Figure 4.2.8 below, 56 percent of the individual artists in the cultural industry who indicated that they engaged in non-creative work cited the need to cross-subsidise their 'creative' work. Twenty-eight percent engaged in non-creative work as part of business expansion. A fifth each indicated 'market is small' and 'risk reduction/diversification' as the reasons for engaging in non-creative work.

Figure 4.2.8: Percent Distribution of Individual Artists in the Cultural industry by Reasons of Engagement in Non-Cultural Work, CSS Zimbabwe, 2012



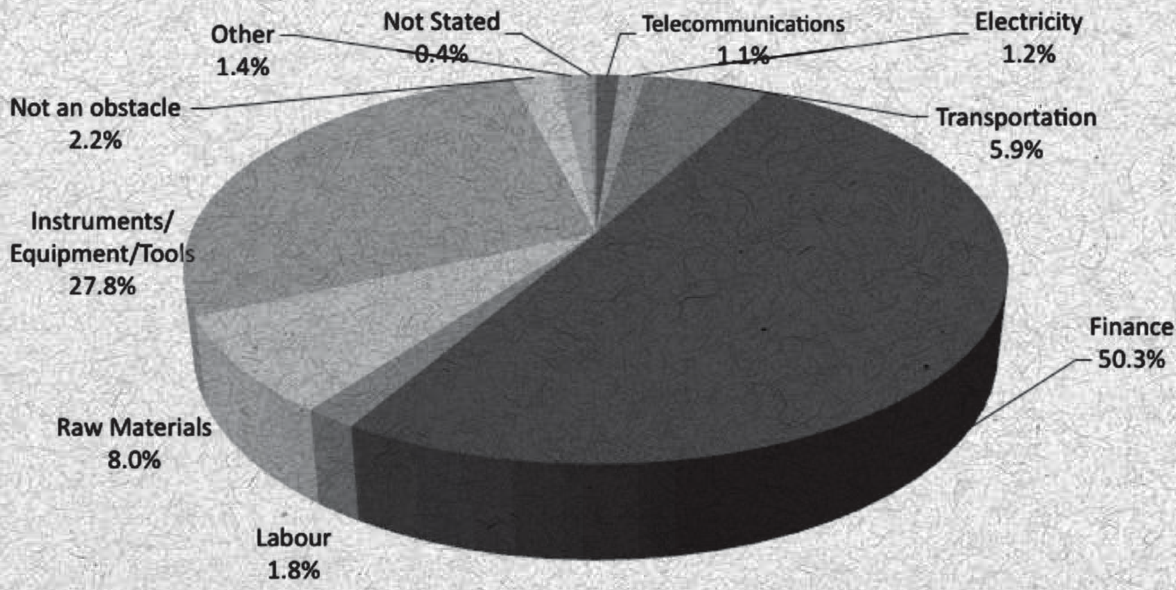
4.2.10 OBSTACLES TO OPERATIONS

Individual artists and institutions were asked about the main obstacles being faced in the operations of their creative work. The obstacles faced were classified into six broad categories as follows: cost; regulatory framework; access; market conditions; socio-economic conditions and perception.

a. Cost

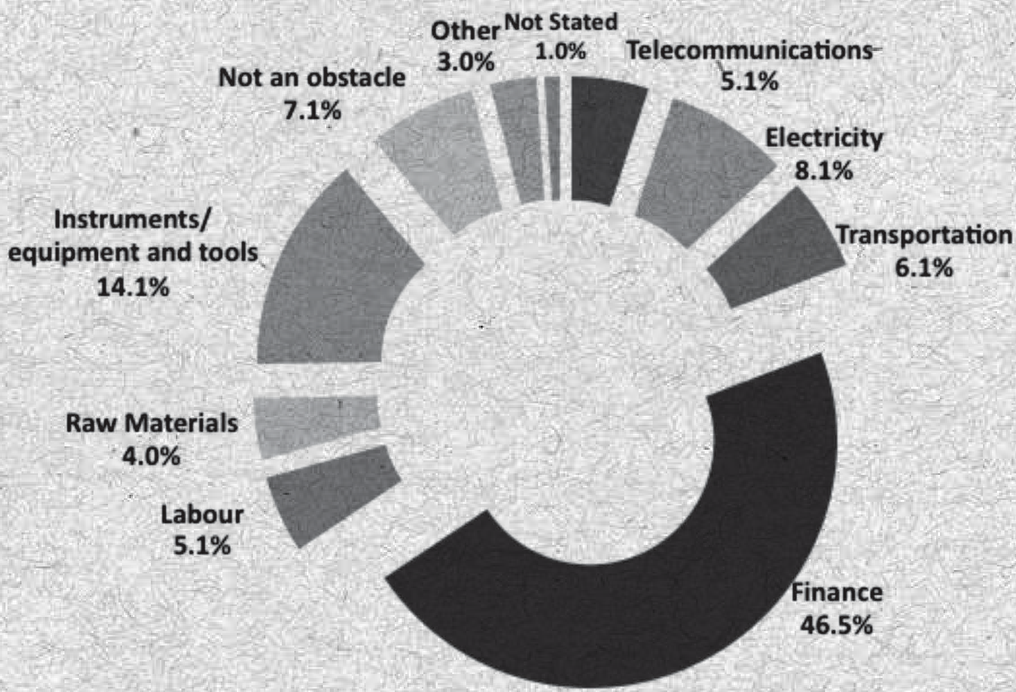
About half (50.3 percent) of the individual artists mentioned the cost of finance as their main obstacle and about 28 percent cited the cost of instruments/equipment/tools. Around eight percent reported cost of raw materials while close to six percent cited cost of transport as an obstacle. See Figure 4.2.9 below.

Figure 4.2.9: Percent Distribution of Individual Artists by Obstacles of Cost, CSS Zimbabwe, 2012



For institutions, 46 percent mentioned the cost of finance as their main obstacle followed by around 14 percent who cited the cost of instruments/equipment/tools. Eight percent were of the view that the cost of electricity was the main obstacle while close to six percent cited the cost of transport. Seven percent indicated that finance was not an obstacle. See Figure 4.2.10 below.

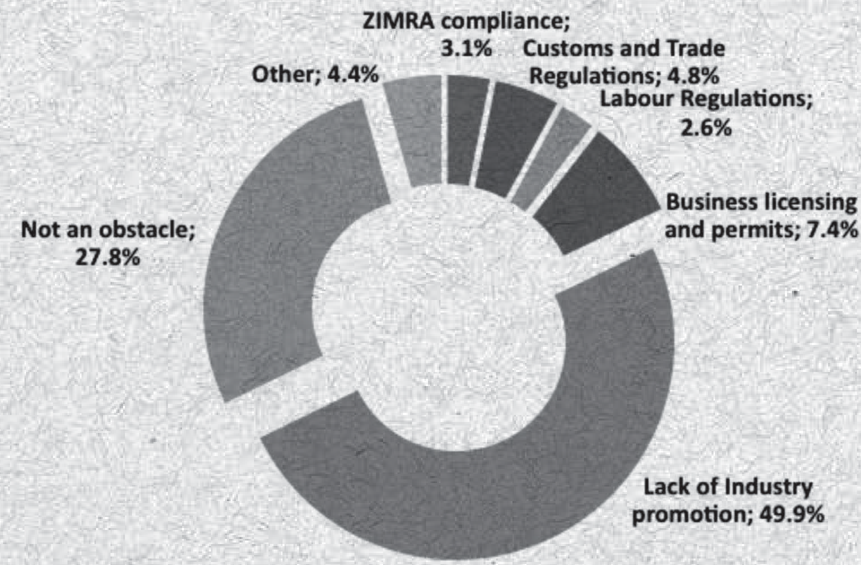
Figure 4.2.10: Percent Distribution of Institutions by Obstacles of Cost, CSS Zimbabwe, 2012



b. Regulatory Framework

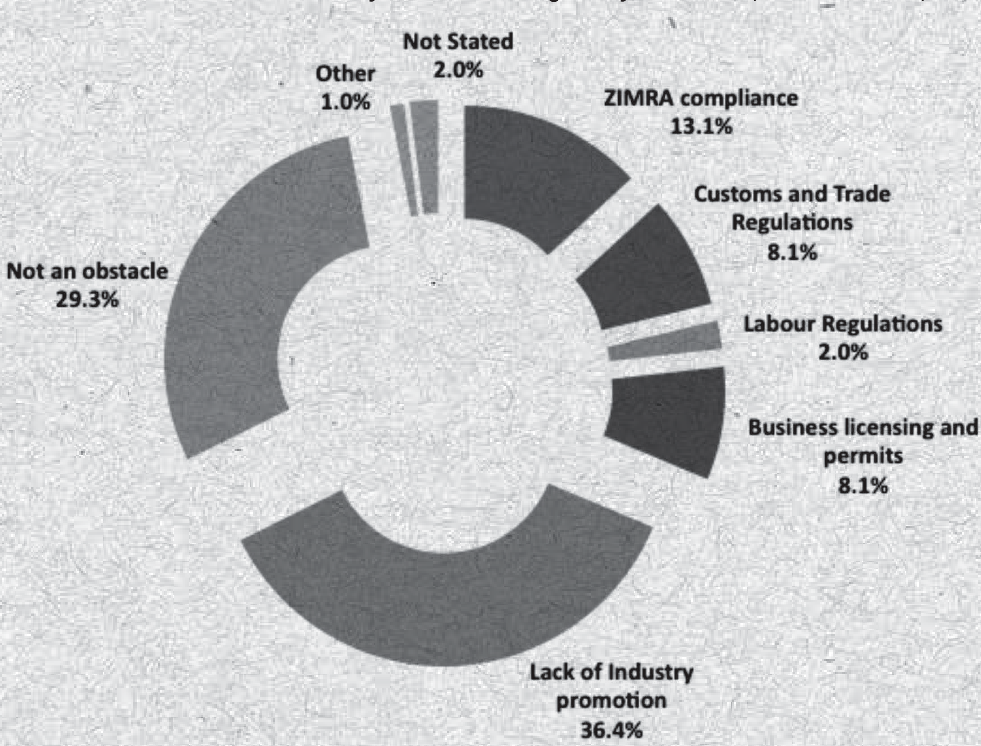
Figure 4.2.11 below shows the distribution of individual artists in the cultural industry by obstacles related to regulatory framework. Almost 50 percent of them cited lack of industry promotion, and seven percent cited business licensing and permits as the main obstacles within the regulatory framework. Close to 28 percent indicated that they had no obstacle under the regulatory framework.

Figure 4.2.11: Percent Distribution of Individual Artists by Obstacles of Regulatory Framework, CSS Zimbabwe, 2012



As shown in Figure 4.2.12 below, slightly above 36 percent of institutions cited lack of industry promotion as the main obstacle followed by 13 percent who cited ZIMRA compliance. Just above 29 percent indicated that the regulatory framework was not an obstacle in their operations.

Figure 4.2.12: Percent Distribution of Institutions by Obstacles of Regulatory Framework, CSS Zimbabwe, 2012



c. Access

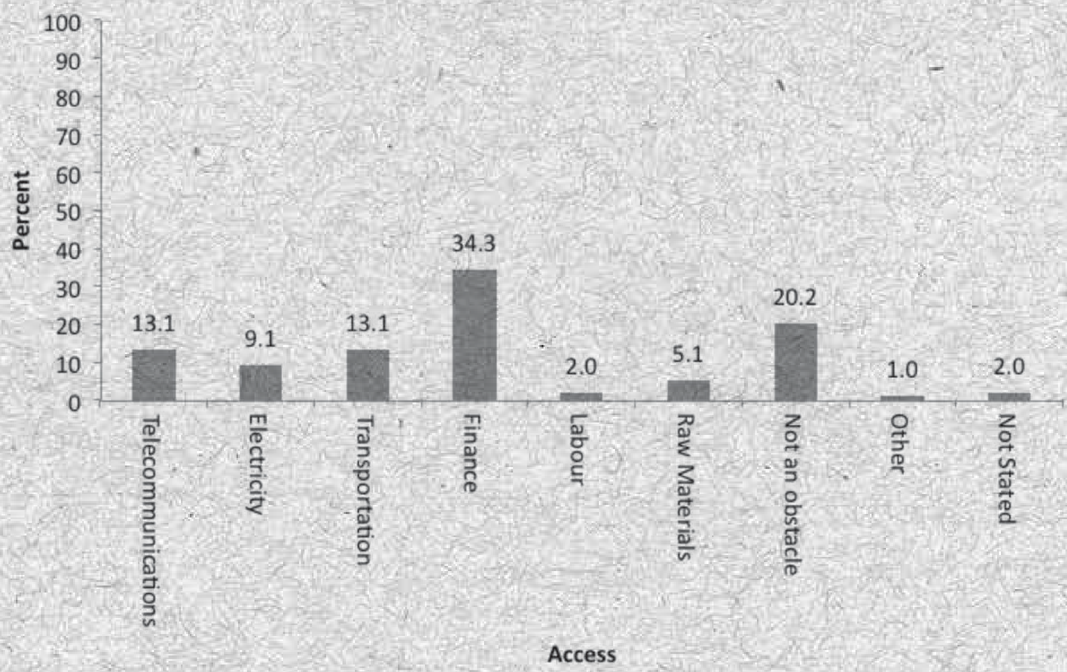
As shown in Table 4.2.10 below, 39 percent of the individual artists cited access to finance as their main obstacle followed by access to instruments/equipment /tools which was about 30 percent. Around seven percent indicated that they had no obstacle in this category.

Table 4.2.10: Percent Distribution of Individual Artists by Obstacles of Access, CSS Zimbabwe, 2012

Access	Percent	Number
Telecommunications	1.6	12
Electricity	1.9	14
Transportation	10.6	78
Finance	38.8	285
Labour	1.0	7
Raw Materials	7.4	54
Instruments/Equipment/Tools	29.7	218
Not an obstacle	7.0	51
Other	2.0	14
Not Stated	0.1	1
Total	**100**	**734**

For the institutions, 34 percent cited access to finance as their main obstacle followed by 13 percent each citing access to telecommunications and transportation. Around 20 percent indicated that they had no obstacle in this category as shown in Figure 4.2.13 below.

Figure 4.2.13: Percent Distribution of Institutions by Obstacles of Access, CSS Zimbabwe, 2012



d. Market Conditions

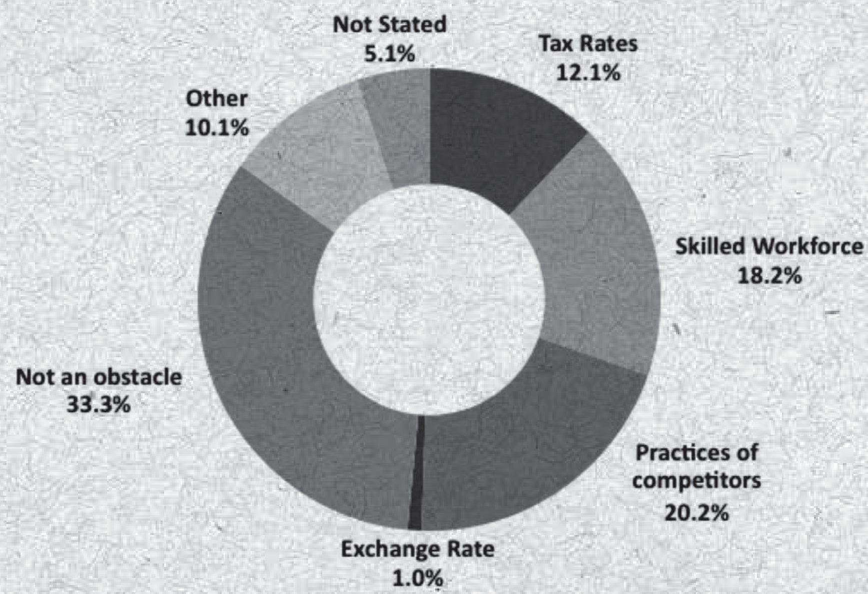
The amount of income received by individual artists depends on the market conditions prevailing. As shown in Table 4.2.11 below, around 35 percent cited practices of competitors among the practioners as the main obstacle while close to 18 percent gave other reasons. Around 28 percent indicated that market conditions were not an obstacle.

Table 4.2.11: Percent Distribution of Individual Artists by Obstacles of Market Conditions, CSS Zimbabwe, 2012

Market Conditions	Percent	Number
Tax Rates	6.3	46
Skilled Workforce	8.0	59
Practices of competitors	35.3	259
Exchange Rate	3.4	25
Not an obstacle	28.1	206
Other	17.9	131
Not stated	1.1	8
Total	**100**	**734**

Market conditions obstacles were also analysed for institutions as shown in Figure 4.2.14 below. Twenty percent cited practices of competitors and 18 percent reported access to skilled workforce as the main obstacles within the market conditions category. However, 33 percent of the institutions indicated that market conditions were not an obstacle.

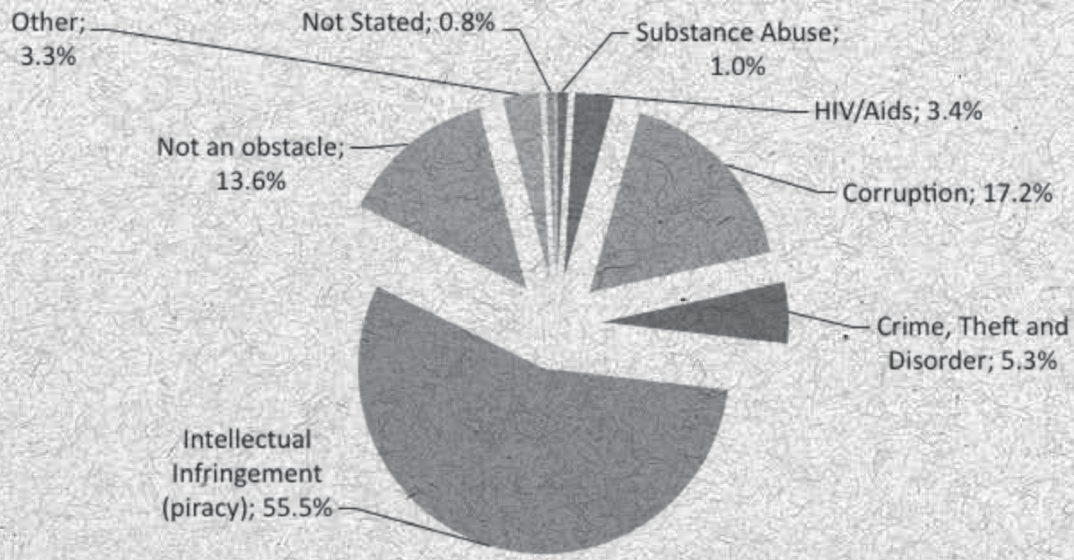
Figure 4.2.14: Percent Distribution of Institutions by Obstacles of Market Conditions, CSS Zimbabwe, 2012



e. Socio-Economic Conditions

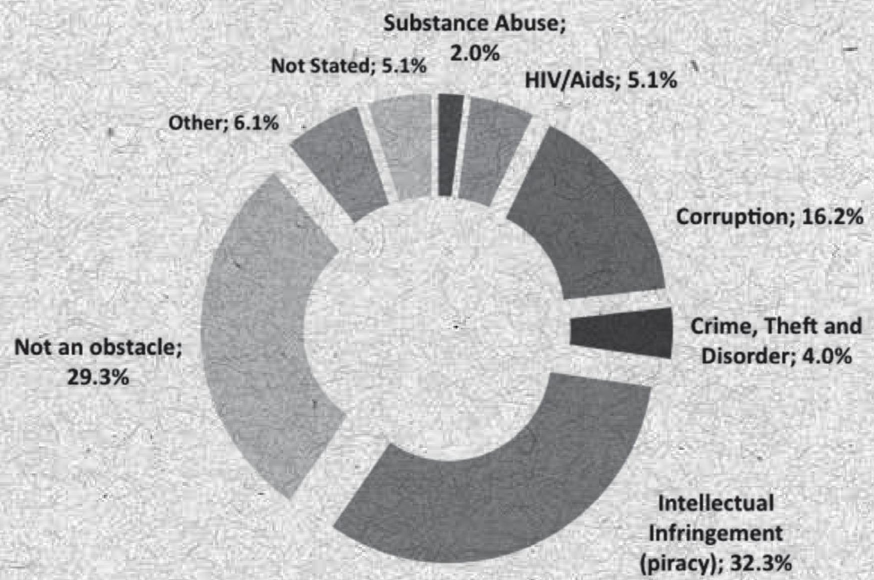
Fifty-six percent of the individual artists cited intellectual property rights infringement (piracy) as the main socio-economic condition affecting their operations followed by just above 17 percent who cited corruption. Close to 14 percent indicated that socio-economic conditions were not an obstacle. See Figure 4.2.15 below.

Figure 4.2.15: Percent Distribution of Individual Artists by Obstacles of Socio-economic Conditions, CSS Zimbabwe, 2012



Nearly a third (32.3 percent) of the institutions cited intellectual property rights infringement (piracy) as the main socio-economic condition affecting their operations while 16 percent cited corruption. Around 29 percent indicated that socio-economic conditions were not an obstacle. See Figure 4.2.16 below.

Figure 4.2.16: Percent Distribution of Institutions by Obstacles of Socio-economic Conditions, CSS Zimbabwe, 2012



f. Perception

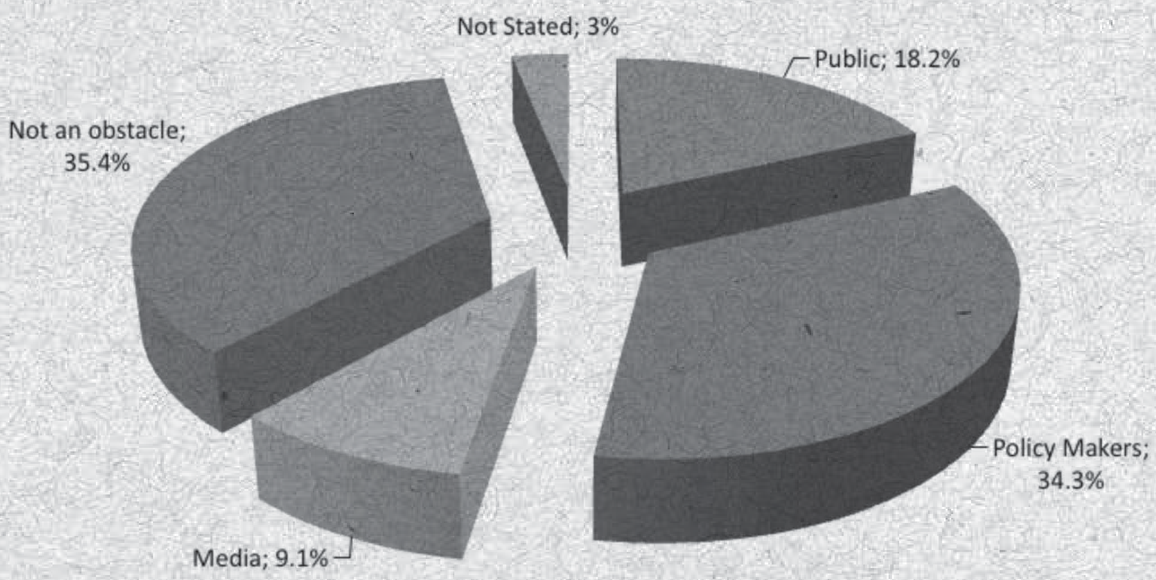
In the perception category, 27 percent of the individual artists cited public perception as the main hindrance in their operations followed by the media with around 20 percent. Close to 35 percent indicated that perception was not an obstacle to their work as shown in Table 4.2.12 below.

Table 4.2.12: Percent Distribution of Individual Artists by Obstacles of Perception, CSS Zimbabwe, 2012

Perception	Percent	Number
Public	26.6	195
Policy Makers	13.1	96
Media	20.4	150
Family	4.1	30
Not an obstacle	34.6	254
Other	1.1	8
Not Stated	0.1	1
Total	**100**	**734**

Thirty-four percent and 18 percent of the institutions cited perception from policy makers and the public, respectively, as the main hindrances in their operations. Slightly above 35 percent indicated that percetion was not an obstacle to their work as shown in Figure 4.2.17 below.

Figure 4.2.17: Percent Distribution of Institutions by Obstacles of Perception, CSS Zimbabwe, 2012



4.2.11 DEVELOPMENT NEEDS

Individual artists and institutions who took part in the survey were asked about their main needs for further developing their businesses. The needs were:

- training
- developing new ideas for cash generations
- improving process and efficiency
- marketing
- obtaining government funding
- obtaining commercial funding
- international expansion
- infrastructure
- information and Communication Technology (ICT) usage and
- assistance from bilateral, multilateral and other international assistance.

Of the individual artists in the Performance and Celebrations domain, about 56 percent needed help in obtaining funding and 16 percent required help in marketing. Slightly below half (48 percent) of the individual artists in the Visual Arts and Crafts domain needed help in obtaining funding while about 28 percent needed help in marketing of products.

The need for training was conspicuous in the Literary Arts and Publishing (12.5 percent), Film, Audio-Visual and Interactive Media (11.1 percent) and Design and Creative Services (9.5 percent) domains as presented in Table 4.2.13 below.

Table 4.2.13: Percent Distribution of Individual Artists by Domain and Area of Need for Development, CSS Zimbabwe, 2012

	Area of Need											Total	
Domain	Training	Strategy & business planning	Developing new ideas for cash generations	Improving process & efficiency	Marketing	Obtaining funding	International expansion	ICT usage	Infrastructure	Other	Not Stated	Number	Percent
Performance and Celebrations	3.8	5.5	3.6	3.1	16.4	56.2	2.1	2.1	1.9	5.4	0.0	524	100.0
Visual Arts and Crafts	1.8	3.2	2.7	2.7	27.9	47.8	3.2	2.3	4.1	4.1	0.5	222	100.0
Literary Arts & Publishing	12.5	12.5	10.0	7.5	17.5	32.5	0.0	2.5	0.0	5.0	0.0	40	100.0
Film, Audio-Visual and Interactive Media	11.1	6.7	2.2	2.2	22.2	42.2	2.2	6.7	0.0	4.4	0.0	45	100.0
Design and Creative Services	9.5	14.3	0.0	0.0	23.8	38.1	0.0	4.8	4.8	4.8	0.0	21	100.0
Tourism (Related domain)	0.0	0.0	50.0	0.0	0.0	50.0	0.0	0.0	0.0	0.0	0.0	2	100.0
Other	0.0	0.0	50.0	0.0	0.0	50.0	0.0	0.0	0.0	0.0	0.0	2	100.0

Table 4.2.14 below presents information on the needs for development for institutions in the Cultural industry. Twenty-seven percent of institutions in the Performance and Celebrations domain cited training as their main need for development. Of the institutions that were operating in the Design and Creative Services domain, about 29 percent each cited training and assistance in obtaining commercial funding as their needs for development. Areas that were least mentioned as needs for development by most of the institutions were ICT usage (marketing and distribution) and improving process and efficiency.

Table 4.2.14: Percent Distribution of Institutions by Area of Need for Development and Domain, CSS Zimbabwe, 2012

	Area of Need											Total	
Domain	Training	Strategy & business planning	Developing new ideas for cash generations	Improving process & efficiency	Marketing	Obtaining Gvt Funding	Obtaining commercial funding	International expansion	ICT usage	Assistance from bilateral, multilateral & other national assistance	Not Stated	Number	Percent
Performance and Celebrations	26.5	8.8	11.8	0.0	17.7	5.9	11.8	0.0	5.9	8.8	2.9	34	100
Visual Arts and Crafts	17.1	11.4	20.0	0.0	8.6	8.6	20.0	11.4	2.9	0.0	0.0	35	100
Literary Arts & Publishing	16.1	3.2	6.5	0.0	9.7	6.5	19.4	9.7	9.7	16.1	3.2	31	100
Film, Audio-Visual and Interactive Media	19.4	5.6	13.9	0.0	2.8	11.1	25.0	11.1	0.0	11.1	0.0	36	100
Design and Creative Services	28.6	0.0	7.1	7.1	7.1	7.1	28.6	0.0	0.0	14.3	0.0	14	100
Tourism (Related domain)	10.0	10.0	20.0	0.0	10.0	0.0	30.0	0.0	0.0	20.0	0.0	10	100
Other	41.7	8.3	8.3	0.0	0.0	8.3	16.7	0.0	0.0	16.7	0.0	12	100

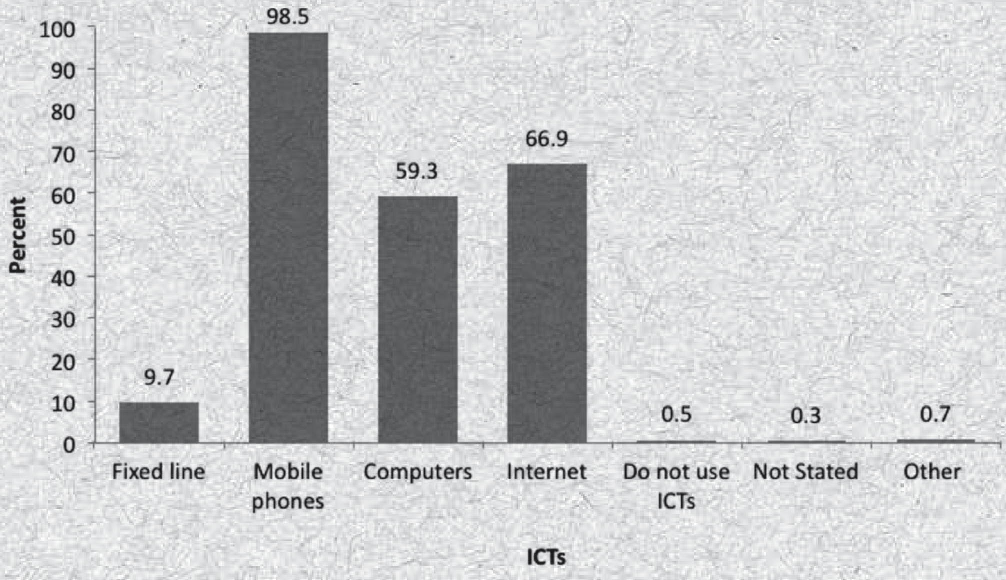
4.2.12 TECHNOLOGY AND CONSTRAINTS

Individual artists and institutions were asked about the use of ICTs in their businesses. The ICTs were limited to fixed lines, mobile phones, computers, internet, computer hardware and software.

Use of ICTs for Business Purposes

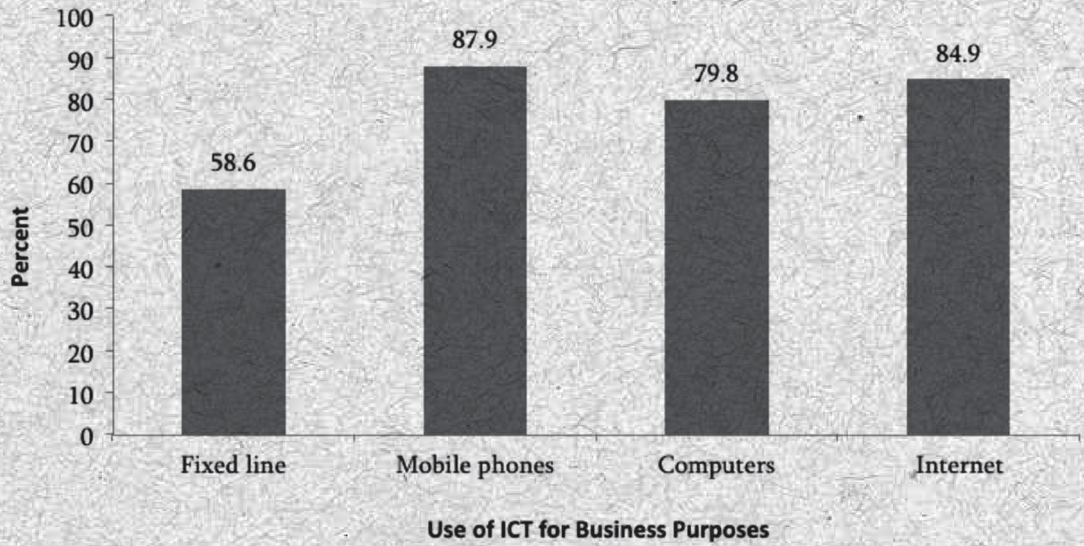
The distribution of individual artists in the cultural industry by use of ICTs for business purposes is presented in Figure 4.2.18. About 99 percent of individual artists in the cultural industry used mobile phones. Sixty-seven percent used the internet for business purposes. Fixed line telephones were used by 10 percent of individual artists in the cultural industry.

Figure 4.2.18: Percent Distribution of Individual Artists in the Cultural industry by Use of ICT for Business Purposes, CSS Zimbabwe 2012



The distribution of institutions in the cultural industry by use of ICTs for business purposes is presented in Figure 4.2.19. Eighty-eight percent of institutions in the cultural industry used mobile phones for business purposes. Eighty-five percent of institutions used internet for business purposes. Computers were used for business by 80 percent of the institutions. Fixed line telephones were used by 59 percent of institutions in the cultural industry.

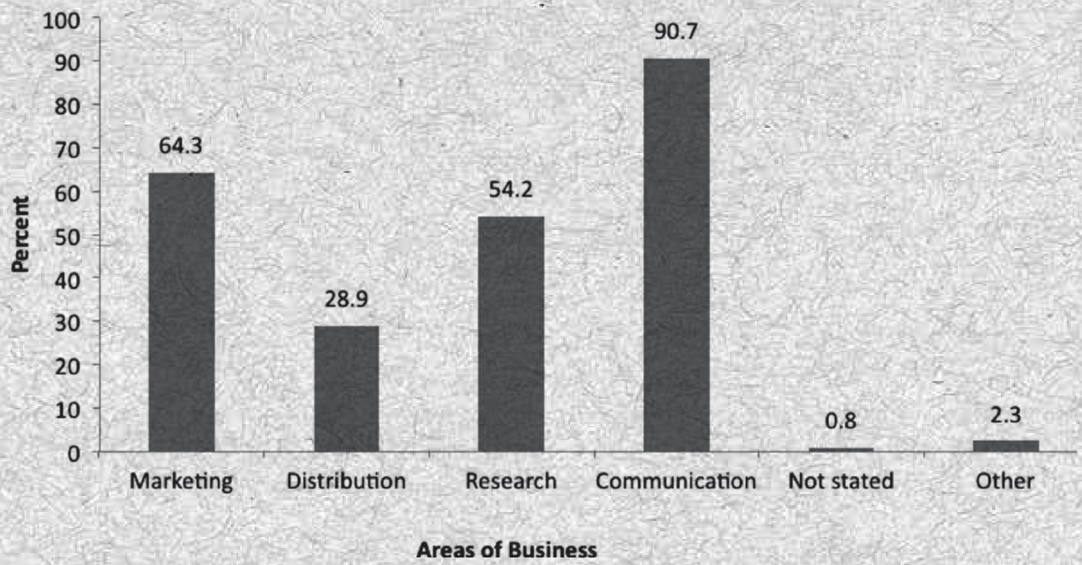
Figure 4.2.19: Percent Distribution of Institutions in the Cultural industry by Use of ICT for Business Purposes, CSS Zimbabwe 2012



Use of ICTs in Areas of Business

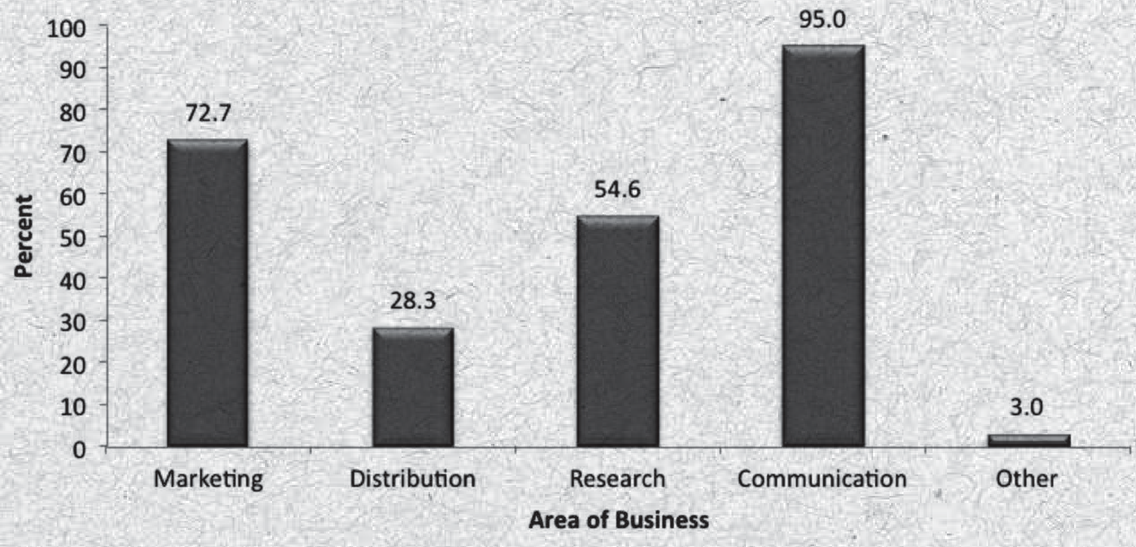
The distribution of individual artists in the cultural industry who participated in the survey by their use of ICTs in areas of business is presented in Figure 4.2.20. Amongst the interviewed, 91 percent indicated that they used ICTs for communication. Sixty-four percent cited marketing. Fifty-four percent used ICTs for research. Twenty-nine percent reported that they used ICTs for distribution of their products.

Figure 4.2.20: Percent Distribution of Individual Artists in the Cultural industry by Use of ICTs in Areas of Business, CSS Zimbabwe 2012



The distribution of institutions in the cultural industry by their usage of ICTs in various areas of business is presented in Figure 4.2.21. Ninety-five percent of institutions in the cultural industry indicated that they used ICTs for communication. Seventy-three percent of institutions in the industry used ICTs for marketing. Fifty-five percent used ICTs for research. Twenty-eight percent of the institutions reported that they used ICTs for distribution of their products.

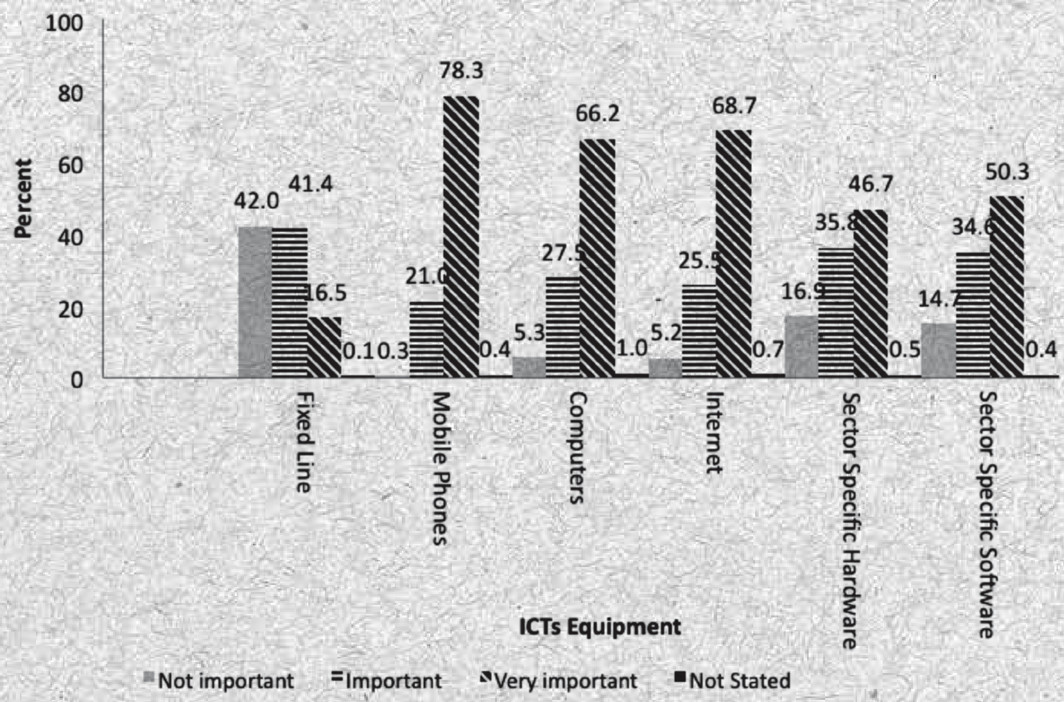
Figure 4.2.21: Percent Distribution of Institutions in the Cultural industry by Use of ICTs in Business, CSS Zimbabwe 2012



Importance of ICTs in the Cultural industry

The importance of ICTs to individual artists in the cultural industry is presented in Figure 4.2.22 below. Seventeen percent of the individual artists interviewed in the cultural industry reported that fixed line telephones were very important. An equal percent each (40 percent) indicated that fixed line telephones were “important” and “not important”, respectively. Mobile phones were reported to be very important by 78 percent of the individual artists while 21 percent indicated that mobile telephone lines were important. Computers were considered to be very important and important by 66 percent and 28 percent of the individual artists, respectively. Sixty-nine percent of the individual artists reported that internet was “very important” whilst 25 percent also indicated that internet was “important”. Sector specific hardware and software were considered to be very important in the cultural industry by 47 percent and 50 percent, respectively.

Figure 4.2.22: Percent Distribution of Individual Artists in the Cultural industry by Importance of ICTs in Business, CSS Zimbabwe 2012

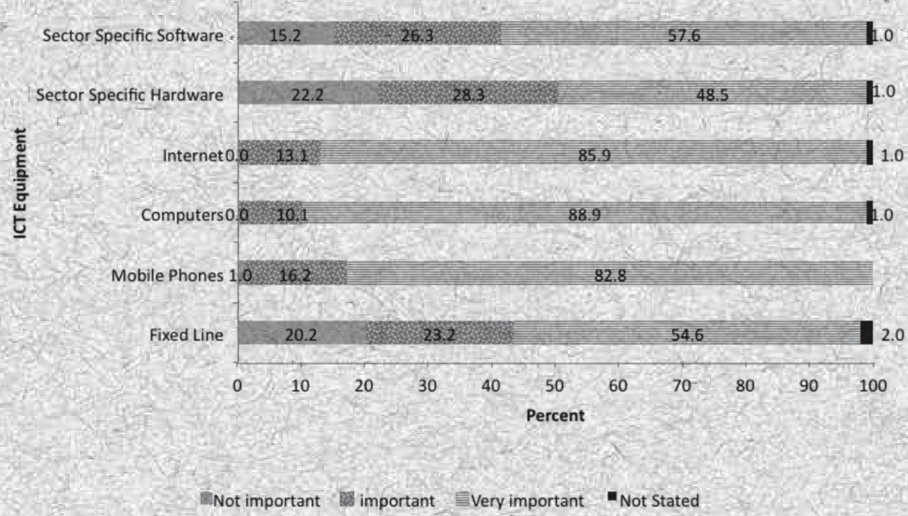


As shown in Table 4.2.23 below, 55 percent of the institutions in the cultural industry reported that fixed line telephones were very important while 23 percent indicated that fixed telephone lines were important. Mobile phones were reported to be very important by 83 percent of the institutions while 16 percent indicated that mobile phones were important.

Computers were considered to be "very important" and "important" by 89 percent and 10 percent of the institutions, respectively. Eighty-six percent of the institutions reported that internet was very important whilst 13 percent also indicated that internet was important in the cultural industry. Sector specific hardware and software were considered to be very important in the cultural industry by 48 percent and 58 percent, respectively.

Generally, institutions considered computers to be the most important, followed by internet and mobile phones.

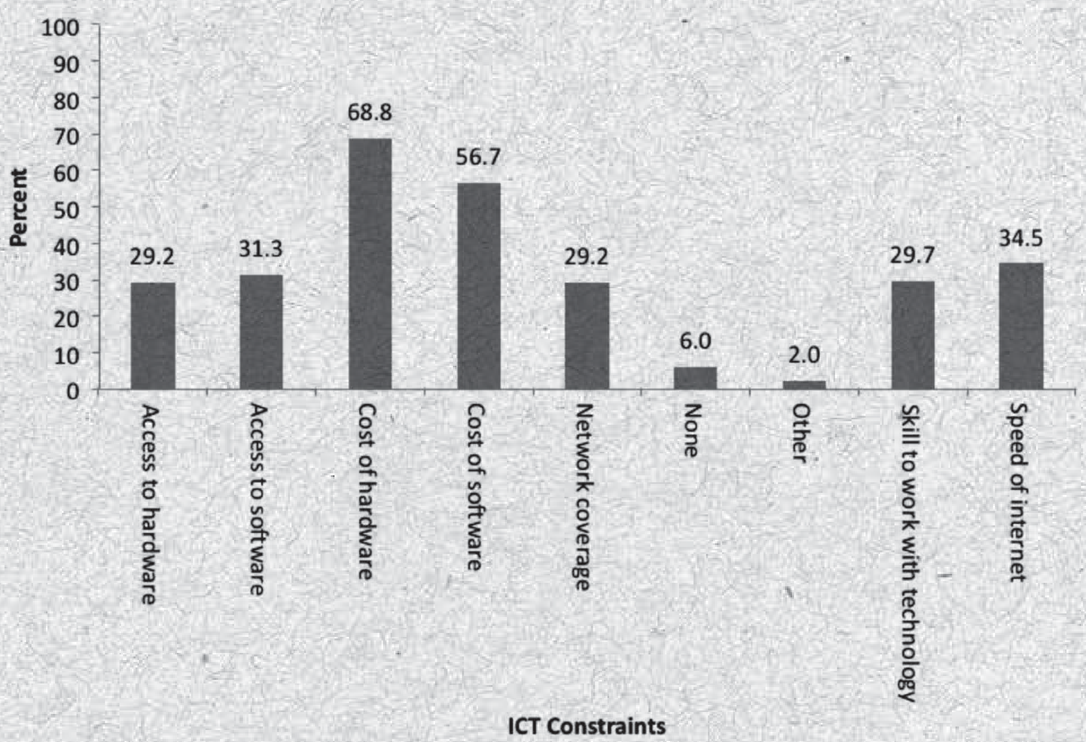
Figure 4.2.23: Percent Distribution of Institutions in the Cultural industry by Importance of ICTs in Business, CSS Zimbabwe 2012



ICT Constraints

Individual artists in the cultural industry were asked to provide information about the ICT constraints that they faced in their operations. Sixty-eight percent of the interviewed persons indicated that the cost of hardware was a major constraint to them. Cost of software was cited as a constraint by 57 percent of the individual artists in the cultural industry. Thirty-five percent reported that the speed of broadband was a constraint in their work. Network coverage was cited as a constraint by just above 29 percent of the individual artists. See Figure 4.2.24 below.

Figure 4.2.24: Percent Distribution of Individual Artists in the Cultural industry by ICT Constraints, CSS Zimbabwe 2012



As shown in Table 4.2.15 below, 55 percent of the institutions indicated that the cost of hardware was a major constraint to them. Cost of software was cited as a constraint by 53 percent of institutions in the cultural industry. Forty-four percent of institutions reported that the speed of internet was a constraint in their work. Poor connectivity was cited as a constraint by 38 percent of the institutions in the cultural industry.

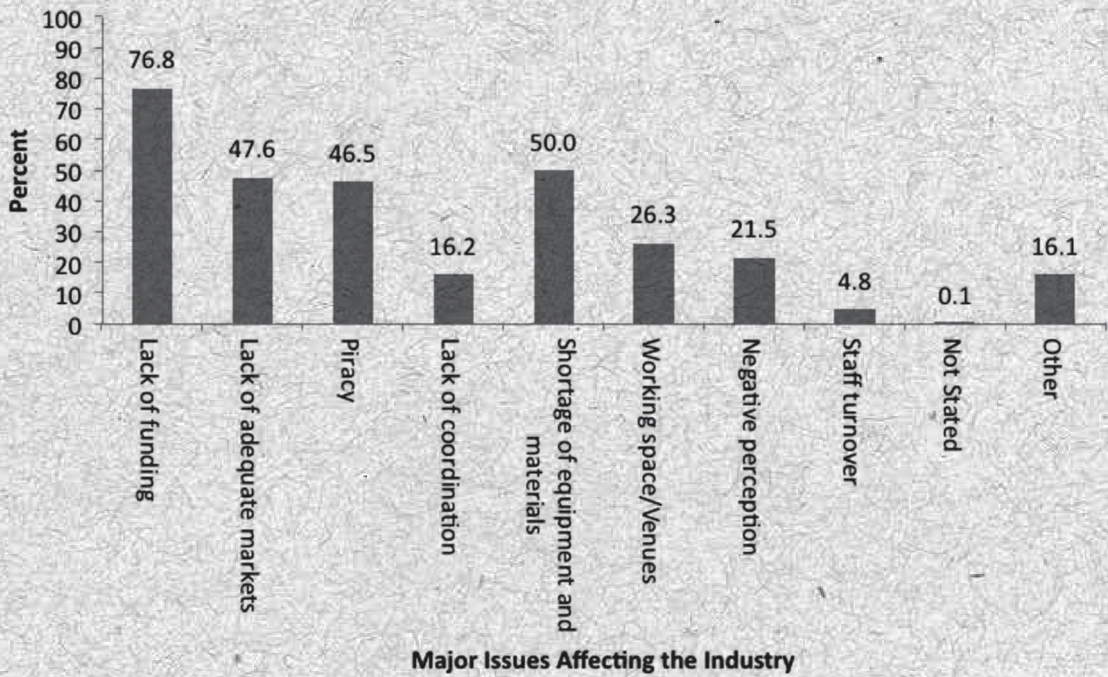
Table 4.2.15: Percent Distribution of Institutions in the Cultural industry by ICT Constraints, CSS Zimbabwe 2012

Types of Constraints	Percent	Number
Cost of hardware	55.6	55
Cost of software	52.5	52
Access to hardware	10.1	10
Access to software	12.1	12
Speed of broadband	44.4	44
Poor connectivity	38.4	38
Skill to work with technology	21.2	21
Obsoleteness	10.1	10
No ICT constraints	10.1	10
Not Stated	3.0	3

Major Constraints Affecting the Cultural industry

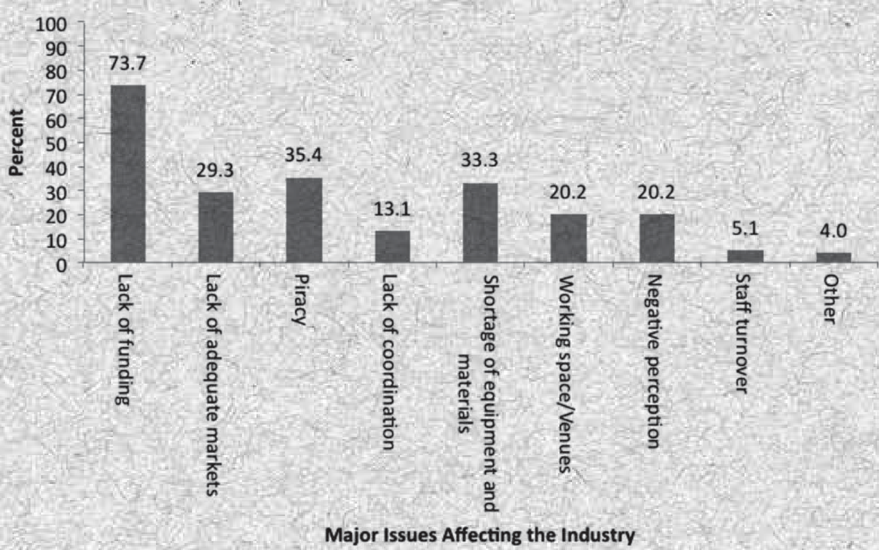
The types of constraints faced by individual artists in the cultural industry are presented in Figure 4.2.25 below. Around three-quarters (76.9 percent) of the individual artists in the cultural industry indicated that lack of funding was a major constraint in their businesses. Shortage of equipment and materials was cited as a constraint in the industry by 50 percent of the individual artists. Almost 48 percent reported lack of adequate market as a constraint to them. Piracy was cited as a constraint by slightly above 66 percent. Staff turnover was not considered as a major constraint.

Figure 4.2.25: Percent Distribution of Individual Artists in the Cultural industry by Major Issues Affecting the Industry, CSS Zimbabwe 2012



Almost seventy-four percent of the institutions in the cultural industry indicated that lack of funding was a major constraint in their businesses. Piracy was cited as a constraint in the industry by 33 percent of the institutions. About a third of institutions in the cultural industry reported that shortage of equipment and materials was a constraint to them. Lack of coordination (13.1 percent) and staff turnover was not considered as a major constraint as shown in Figure 4.2.26 below.

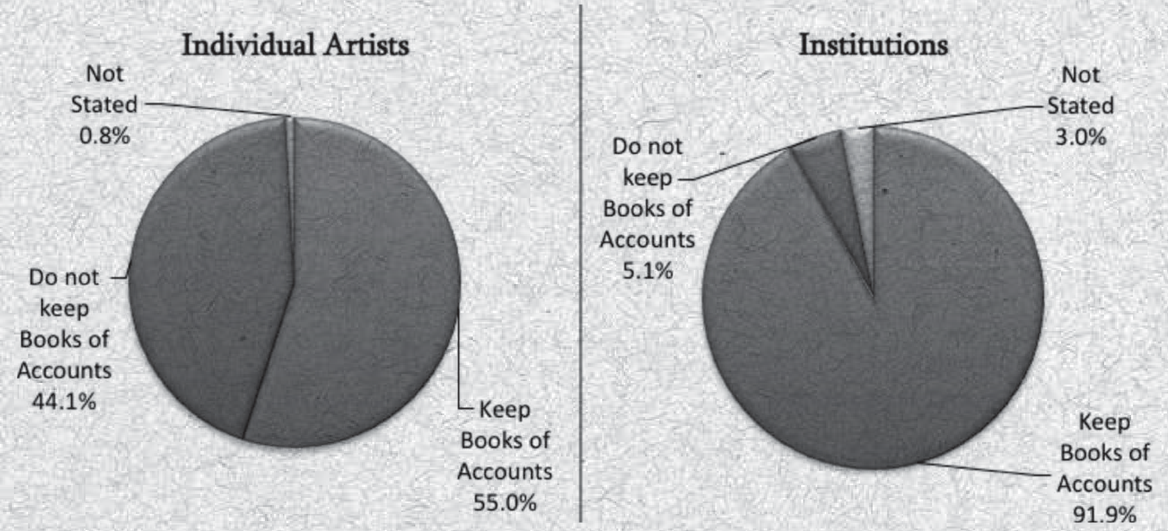
Figure 4.2.26: Percent Distribution of Institutions in the Cultural industry by Major Issues Affecting the Industry, CSS Zimbabwe 2012



Records of Accounts

Just above half (55.0 percent) and about 92 percent of the individual artists and the institutions, respectively, indicated that they keep records of accounts as shown in Figure 4.2.27.

Figure 4.2.27: Percent Distribution of Individual Artists and Institutions in the Cultural industry by Keeping of Records of Accounts, CSS Zimbabwe 2012



4.2.13 EMPLOYMENT

Type of Employment

The distribution of persons in the culture sector who participated in the survey by their type of employment and cultural domain is presented in Table 4.2.16. In general, the majority of the individual artists were in full time employment. Amongst those who were interviewed from the Performance and Celebrations domain, close to 65 percent were full time employees of whom 51 percent were male and 13 percent were female. Of those who were interviewed under the Visual Arts and Crafts domain about 67 percent were full time employees of whom 60 percent were male and 7 percent were female. Amongst those interviewed from the Literary Arts and Publishing 54 percent were full time employees with male employees contributing about 40 percent while female were almost 14 percent. Slightly over 47 percent of those who were interviewed from the Film, Audio-Visual and Interactive Media domain were doing their business full time. This comprised 39 percent male and 8 percent female. Close to 53 percent were doing their business on a part time basis. Of these about 34 percent were male and around 19 percent were female. Amongst respondents interviewed from the Design and Creative Services domain, 53 percent were employed on part time basis.

Table 4.2.16: Percent Distribution of Individual Respondents by Type of Employment, CSS Zimbabwe 2012

Domain	Full Time			Part Time			Total		Total	
	Male	Female	Total	Male	Female	Total	Males	Females	Percent	Number
Performance and Celebrations	51.3	13.4	64.8	25.9	9.4	35.3	77.3	22.8	100	3 594
Visual Arts and Crafts	59.9	6.8	66.6	28.2	5.2	33.4	88.1	11.9	100	680
Literary Arts and Publishing	39.9	13.7	53.6	26.8	19.6	46.4	66.7	33.3	100	138
Film, Audio Visual and Interactive Media	39.1	8.3	47.4	33.7	18.9	52.6	72.8	27.2	100	312
Design and Creative Services	35.4	11.5	46.9	33.3	19.8	53.1	68.8	31.3	100	96
Tourism (Related domain)	88.9	11.1	100.0	0.0	0.0	0.0	88.9	11.1	100	9
Other	77.8	11.1	88.9	11.1	0.0	11.1	88.9	11.1	100	9
Total	51.2	12.1	63.3	26.8	9.8	36.7	78.1	22.0	100	4 838

For institutions which participated in the survey, close to 73 percent of employees in the Performance and Celebrations domain were full time of whom 47 percent were male and 25 percent were female as presented in Table 4.2.17 below. Around 27 percent were on part time with 18 percent being male and 9 percent being female. In the Visual Arts and Crafts domain, about 78 percent were full time employees of whom 56 percent were male and close to 22 percent were female. Around 22 percent were part time employees. Eighty percent of employees in the Literary Arts and Publishing domain were full time with male employees contributing about 50 percent while female were around 30 percent. Close to 20 percent of the employees were doing their business on part time basis of whom 12 percent were male and almost 8 percent were female.

Slightly over 63 percent of employees in the Film, Audio-Visual and Interactive Media domain were full time. These comprised 42 percent male and 21 percent female. Close to 37 percent were doing their business on part time basis. Of these about 24 percent were male while around 12 percent were female. For institutions in the Design and Creative Services, 77 percent of their employees were employed on a full time basis compared to around 23 percent who were on part time basis. Of those who were employed on a full time basis, around 44 percent were male while 34 percent were female. Fourteen percent of the part time employees were male while close to nine percent were female.

Table 4.2.17: Percent Distribution of Institutions by Type of Employment of their Employees, CSS Zimbabwe 2012

Domain	Full Time			Part Time			Total		Total	
	Male	Female	Total	Male	Female	Total	Males	Females	Percent	Number
Performance and Celebrations	48.5	26.1	74.6	18.1	7.3	25.4	66.5	33.5	100	968
Visual Arts and Crafts	56.1	21.9	77.9	16.2	5.8	22.1	72.3	27.7	100	618
Literary Arts and Publishing	51.6	31.2	82.7	12.1	5.2	17.3	63.6	36.4	100	1020
Film, Audio Visual and Interactive Media	42.7	21.1	63.8	25.7	10.6	36.2	68.3	31.7	100	682
Design and Creative Services	43.4	32.0	75.4	13.9	10.7	24.6	57.3	42.7	100	410
Tourism (Related domain)	58.8	39.3	98.1	0.8	1.0	1.9	59.6	40.4	100	483
Sport and Recreation (Related Domain)	61.0	33.2	94.1	3.7	2.1	5.9	64.7	35.3	100	187
Not Stated	52.7	47.3	100.0	0.0	0.0	0.0	52.7	47.3	100	55
Other	56.5	37.8	94.3	3.7	2.0	5.7	60.2	39.8	100	545
Total	51.6	29.0	80.5	13.5	5.9	19.5	65.1	34.9	100	5 329

Changes in Employment

The survey solicited information on whether individual artists in the cultural industry experienced any changes in employment size over the period of 12 months preceding the survey. In the Performance and Celebrations domain, 59 percent of the individual artists indicated that there was no change in the number of employees, 24 percent reported a decrease in the number of employees while 16 percent reported an increase. Of the individual artists who were interviewed in the Visual Arts and Crafts domain, 57 percent reported no change in employment size, just above 29 percent reported a decrease while about 14 percent indicated an increase in their employment size. For those in the Literary Arts and Publishing domain, 73 percent cited that there were no changes in employment size, 18 percent reported a decrease in employment size while 10 percent indicated an increase in employment size over the same period. Close to 58 percent of those who were interviewed in the Film, Audio-Visual and Interactive Media domain reported no change in employment size while 13 percent and 28 percent reported a decrease and an increase in employment size, respectively. Of those interviewed from the Design and Creative Services domain, 67 percent reported no change in employment size while just above 14 percent and 19 percent cited a decrease and an increase in employment size, respectively. See Table 4.2.18 below.

Table 4.2.18: Percent Distribution of Individual Artists by Change in Employment Size and Domain, CSS Zimbabwe 2012

Domain	No change	Decreased	Increased	Not Stated
Performance and Celebrations	59.4	24.1	15.7	1.0
Visual Arts and Crafts	56.8	29.3	13.5	0.5
Literary Arts and Publishing	72.5	17.5	10.0	0.0
Film, Audio Visual and Interactive Media	57.8	13.3	28.3	0.0
Design and Creative Services	66.7	14.3	19.1	0.0

The survey also solicited information on whether institutions in the cultural industry experienced any changes in employment size over the period of 12 months prior to the survey. Amongst the institutions in the Performance and Celebrations domain, 35 percent indicated that there was no change in the number of employees and 32 percent apiece reported a decrease and an increase in the number of employees, respectively. About 46 percent of institutions in the Visual Arts and Crafts domain reported no change in employment size, close to 26 percent reported a decrease and about 29 percent indicated an increase. For those from the Literary Arts and Publishing domain, 51 percent cited that there were no changes in their employment size, 26 percent reported a decrease in their employment size and 23 percent indicated an increase. Almost 56 percent of those who were in the Film, Audio-Visual and Interactive Media domain reported no change in employment size while 25 percent and 19 percent reported a decrease and an increase in employment size, respectively. Of those interviewed from the Design and Creative Services, 36 percent reported no change in employment size while just above 14 percent and 50 percent cited a decrease and an increase in employment size, respectively. See Table 4.2.19 below.

Table 4.2.19: Percent Distribution of Institutions by Change in Employment Size, CSS Zimbabwe 2012

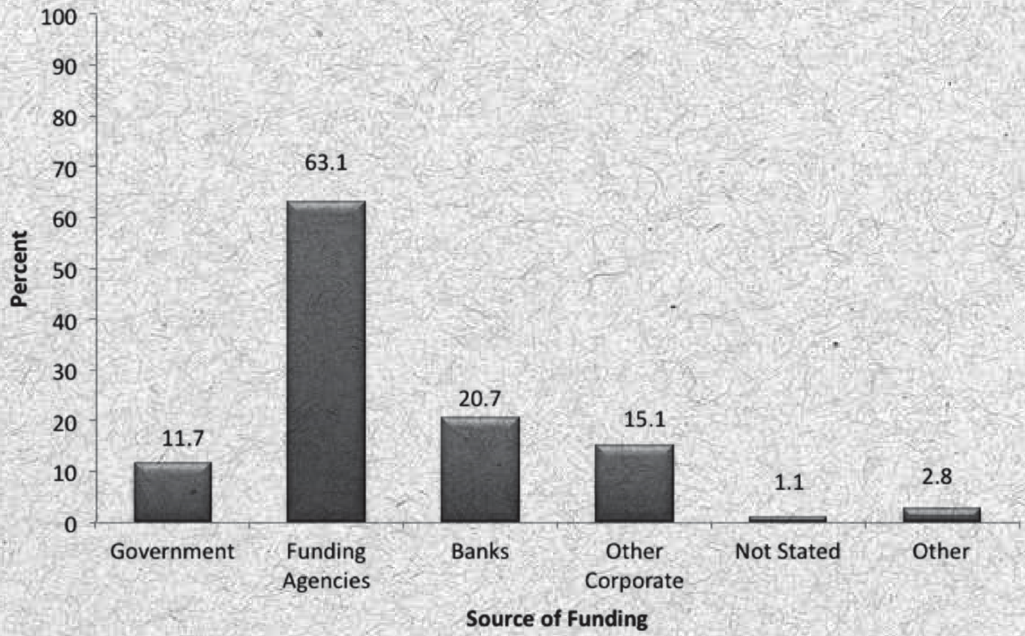
Domain	No change	Decreased	Increased
Performance and Celebrations	35.3	32.4	32.4
Visual Arts and Crafts	45.7	25.7	28.6
Literary Arts and Publishing	51.6	25.8	22.6
Film, Audio Visual and Interactive Media	55.6	25.0	19.44
Design and Creative Services	35.7	14.3	19.4
Tourism (Related domain)	50.0	50.0	0.0

4.2.14 FUNDING OF THE CULTURAL INDUSTRY

Information was sought from individual artists and institutions on the funding of artistic works. The information includes seeking of funding from various sources and reasons for not seeking funding. This section is also covered comprehensively in chapter five.

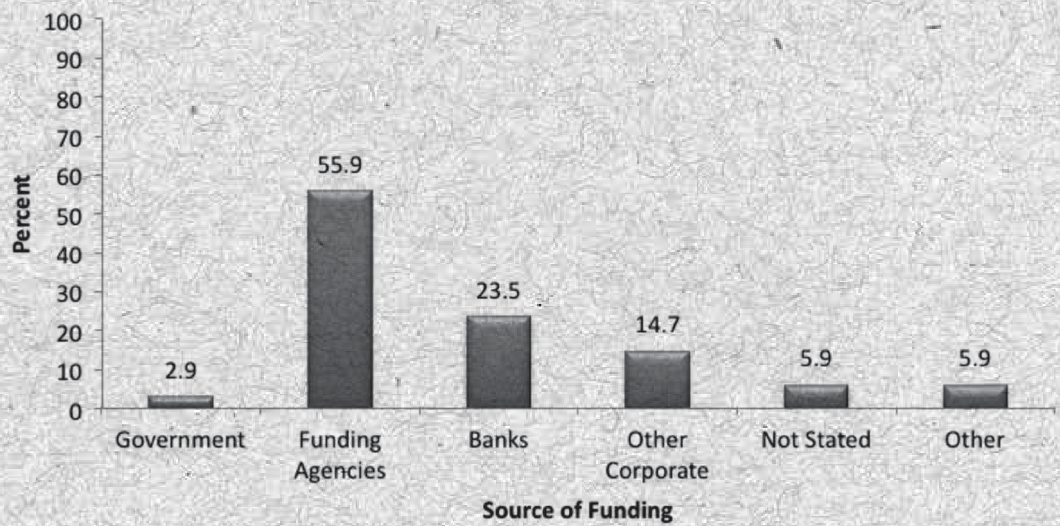
Figure 4.2.28 below show the distributions of individual artists by sources of funding. Funding agencies where cited by 63 percent of the artists who had reported that they sought funding while banks were cited by 21 percent.

Figure 4.2.28: Percent Distribution of Individual Artists in the Cultural industry by Source of Funding, CSS Zimbabwe 2012



Among the institutions, the pattern is similar to that of the individual artists with funding agencies (55.9 percent) being the major source of funding followed by banks (23.5 percent). See Figure 4.2.29 below.

Figure 4.2.29: Percent Distribution of Institutions in the Cultural industry by Source of Funding, CSS Zimbabwe 2012



4.3 CONCLUSION

The majority of the individual artists interviewed in the CSS were in the Performance and Celebrations domain (71.6 percent). Unlike individual artists, the distribution of institutions was not clustered in one domain. Almost half (48.6 percent) of the individual artists in the Visual Arts and Crafts domain are neither registered nor licensed. Forty-seven percent of unregistered artists do not know how or where to register their work. For the individual artists who were engaged in non-cultural activities, 56 percent cited the need to cross subsidise their creative work. Cost of finance was the major obstacle to business operations for individual artists and institutions, 50 percent and 47 percent, respectively. Under the social-economic conditions, infringement of intellectual property rights (piracy) was the major obstacle for individual artists (55.5 percent) and institutions (32.3 percent). For ICT constraints, about 69 percent of the individual artists cited cost of hardware. Across all domains, most of the employees are engaged on full time basis for individual artists and institutions, 63 percent and 81 percent, respectively. The predominant source of funding for both individual artists and institutions was the funding agencies.

CHAPTER 5: ANALYSIS BY DOMAIN

This chapter presents the CSS Zimbabwe 2012 results by domain. The domains considered are the Performance and Celebrations, Visual Arts and Crafts, Literary Arts and Publishing Domain (Books and Press), Film, Audio-Visual and Interactive Media and Design & Creative Services.

Highlights

Performance and Celebrations

- 55% of individual artists had 5 to 10 employees
- 77% of institutions had employees with open-ended contract
- 45% of the individual artists cited instruments/ tools/equipment hire as the highest cost in 2011
- Shows was the main source of income in 2011 for 34 % of institutions
- 3 out 4 (75%) individual artists sell their products/ services only in Zimbabwe

Visual Arts and Crafts

- 48% percent of individual artists work alone
- Over 80% of institutions had employees with open-ended contracts
- 61% of the individual artists reported operating costs as the highest cost in 2011
- 40% of the institutions got most of their income from product sales in 2011
- Almost half (49%) of the individual artists indicated that they sold their products/services in and outside the country

Literary Arts and Publishing Domain (Books and Press)

- 65% of the individual artists work alone
- Slightly above 80% of institutions had employees with an open-ended contract
- 63% of the individual artists reported operating costs as the highest cost in 2011
- 45 percent of the institutions cited direct sales of products as the main source of income in 2011
- 3 out 4 (75%) individual artists sell their products/services only in Zimbabwe

Film, Audio-Visual and Interactive Media

- 38% of the individual artists had between 5 to 10 employees
- 89% of the institutions in the domain had employees with open-ended contracts
- 42% of the individual artists cited instruments/ tools/ equipment hire as the highest cost in 2011
- Donors were the main source of income for 31% of institutions in 2011
- 65% of the individual artists sale their

Design & Creative Services

- 38% each of the individual artists work alone
- 71% of institutions had employees with open-ended contracts
- 43% of the individual artists reported operating costs as the highest cost in 2011
- Donors were the main source of income for 36% of institutions in 2011
- 67% of the individual artists sale their products only in Zimbabwe

PERFORMANCE AND CELEBRATIONS

5.1 PERFORMANCE AND CELEBRATIONS

5.1.1 INTRODUCTION

Performance and Celebrations domain include all expressions of live cultural events. Performing Arts includes both professional and amateur activities, such as theatre, dance, opera and puppetry. It also includes the celebration of cultural events – Festivals, Feasts and Fairs – that occur locally and can be informal in nature. Music is defined in this domain in its entirety, regardless of format. As such, it includes live shows and recorded musical performances, music composition, music recordings, digital music including music downloads and uploads, and musical instruments[5].

5.1.2 EMPLOYMENT

Fig 5.1.1 below presents information on the distribution of individual artists interviewed from the Performance and Celebrations domain by employment size. Amongst those interviewed, 55 percent had between 5 to 10 employees followed by those with 2 to 4 employees with 16 percent.

Figure 5.1.1: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Employment Size, CSS Zimbabwe, 2012

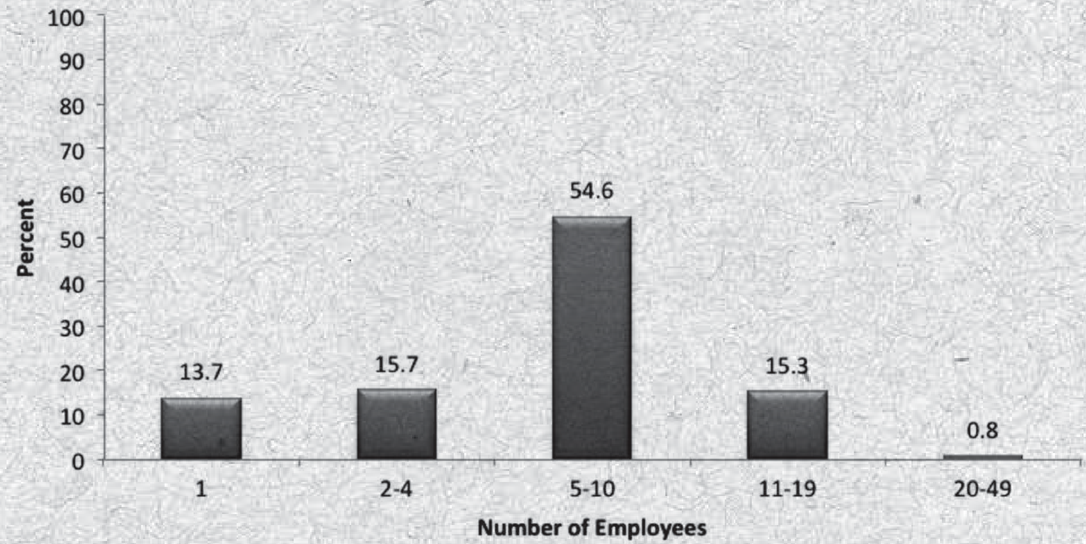


Figure 5.1.2 below presents information on the distribution of institutions covered during the Performance and Celebrations domain by employment size. Twenty-nine percent of the institutions had between 11 to 19 employees followed by about 24 percent of those with 2 to 4 employees.

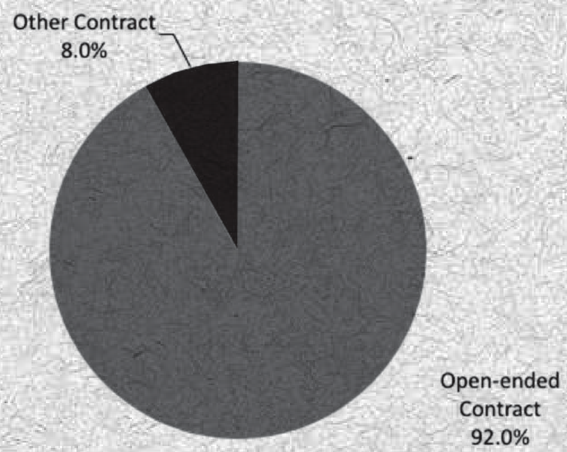
Figure 5.1.2: Percent Distribution of Institutions in the Performance and Celebrations Domain by Employment Size, CSS Zimbabwe, 2012

[5] *The 2009 UNESCO Framework for Cultural Statistics*

Average Length of Employee Contracts

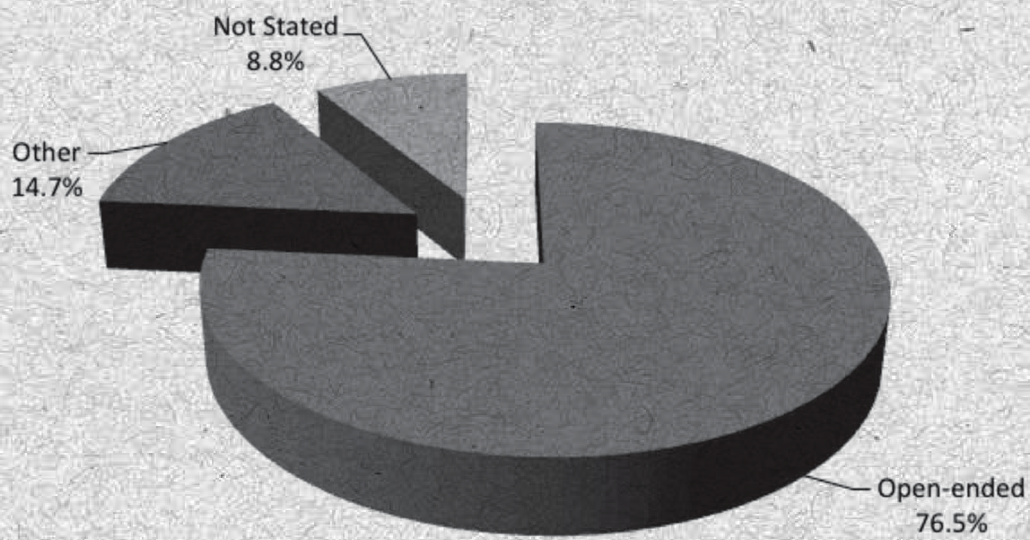
Amongst the individual artists who were interviewed from the Performance and Celebrations domain, the majority (92.0 percent) had employees with open-ended contracts as presented in Figure 5.1.3 below.

Figure 5.1.3: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Average Length of Employee Contracts, CSS Zimbabwe, 2012



Amongst the institutions in the Performance and Celebrations domain, 76 percent had employees with open-ended contract as presented in Figure 5.1.4 below.

Figure 5.1.4: Percent Distribution of Institutions Interviewed from the Performance and Celebrations Domain by Average Length of Employee Contracts, CSS Zimbabwe, 2012



5.1.3 EDUCATION AND TRAINING

Individual artists were asked about the education and training that the principal owner of the business had received. Information collected was on highest level of education completed, whether or not the owner received training for the job that they were doing, formality of training received and the areas of training.

Highest level of Education Attained by Principal Owners of Businesses

Of the individual artists in the Performance and Celebrations domain, 39 percent had completed or attended secondary school education. It is important to note that over 50 percent of the owners had either higher or tertiary education which included certificates, diplomas, degrees and postgraduate degrees. The results are presented in Table 5.1.1 below.

Table 5.1.1: Highest Level of Education Attained by the Principal Owners of Businesses in the Performance and Celebrations Domain, CSS Zimbabwe, 2012

Highest Level of Education	Percent	Number
Primary (1 to 7)	5.2	27
Secondary (1 to 4)	39.3	206
‘A” Level (5 to 6)	4.6	24
Certificate after Primary	1.0	5
Certificate after Secondary ('O' Level)	17.2	90
Certificate after 'A' Level	4.8	25
Diploma after Primary	0.4	2
Diploma after Secondary ('O' Level)	8.2	43
Diploma after 'A' Level	8.4	44
University Degree	8.2	43
Post Graduate Degree	2.1	11
Other	0.4	2
Not Stated	0.4	2
Total	**100**	**524**

Training

Figure 5.1.5 below depicts the distribution of principal owners in the Performance and Celebrations domain by whether or not they received any form of training. A majority of the owners, about 62 percent, were reported not to have received any training for the job that they were doing. Thirty-eight percent received some form of training for the job that they were engaged in.

Figure 5.1.5: Percent Distribution of Principal Owners of Businesses in the Performance and Celebrations Domain by Training, CSS Zimbabwe, 2012

Of those who received some form of training, about 51 percent and 44 percent received informal and formal training, respectively. Four percent received both formal and informal training. The results are shown in Figure 5.1.6 below.

Figure 5.1.6: Percent Distribution of Principal Owners of Businesses in the Performance and Celebrations Domain who Received Training by the Form of Training, CSS Zimbabwe, 2012

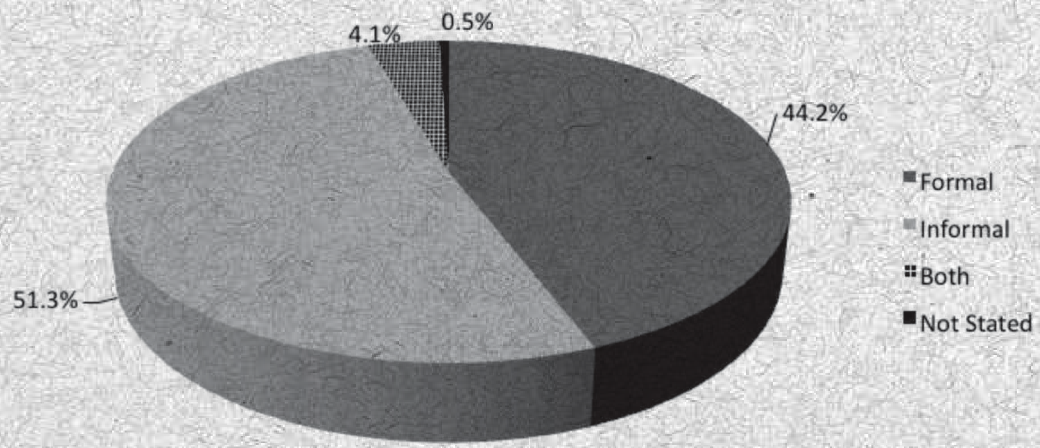
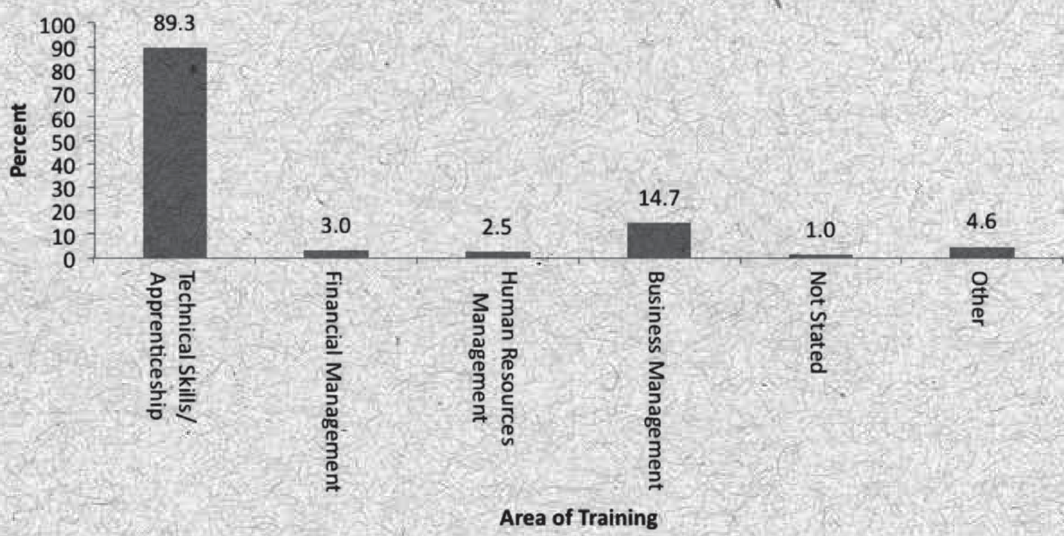


Figure 5.1.7 below shows the distribution of principal owners by the area of training received. Eighty-nine percent of the principal owners reported Technical Skills/ Apprenticeship as an area of training received. Business Management as an area of training received was cited by 15 percent.

Figure 5.1.7: Percent Distribution of Principal Owners of Businesses in the Performance and Celebrations Domain by Area of Training Received, CSS Zimbabwe, 2012



5.1.4 INCOME AND EXPENDITURE

Income in 2011

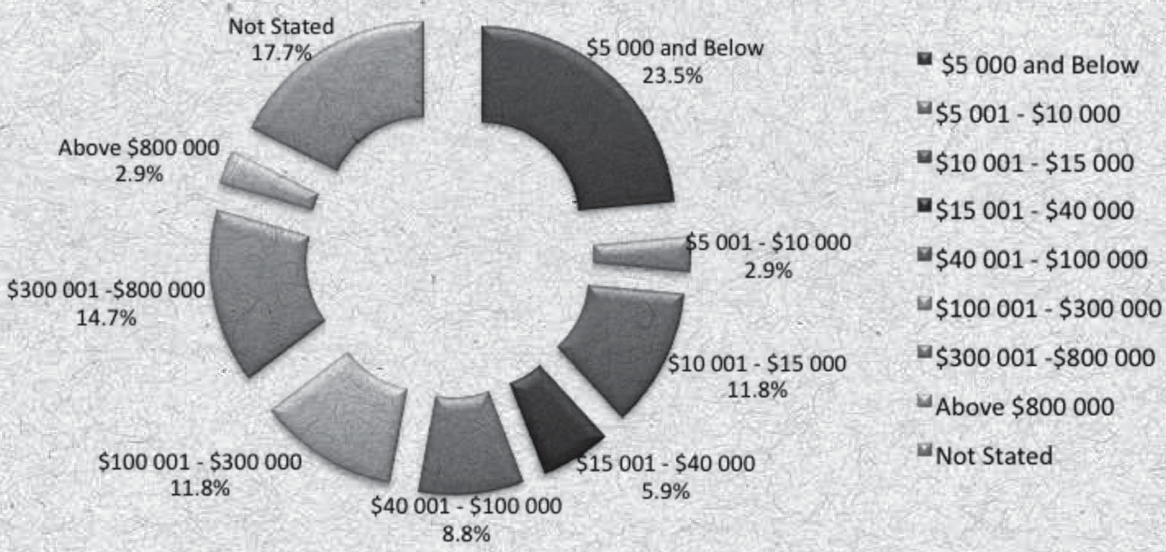
Twenty-seven percent of the individual artists in the Performance and Celebrations domain had a monthly income of US$100 or less. Twenty-two percent of artists in the domain had an average income of between US$251 and US$500 as shown in Table 5.1.2 below.

Table 5.1.2: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Monthly Average Income, CSS Zimbabwe, 2012

Average Income (USD)	Percent	Number
$100 and below	26.5	139
$100 - $250	16.8	88
$251 - $500	22.1	116
$501 - $750	7.8	41
$751 - $1000	9.0	47
$1001 - $2000	5.9	31
$2001 - $3000	3.8	20
$3 000 and Above	3.2	17
Not stated	4.8	25
Total	**100**	**524**

The Figure 5.1.8 below shows the annual incomes for institutions in the Performance and Celebrations domain. Twenty-one percent of institutions in this domain earned an income of US$5 000 and below and another 21 percent earned income of above US$800 000.

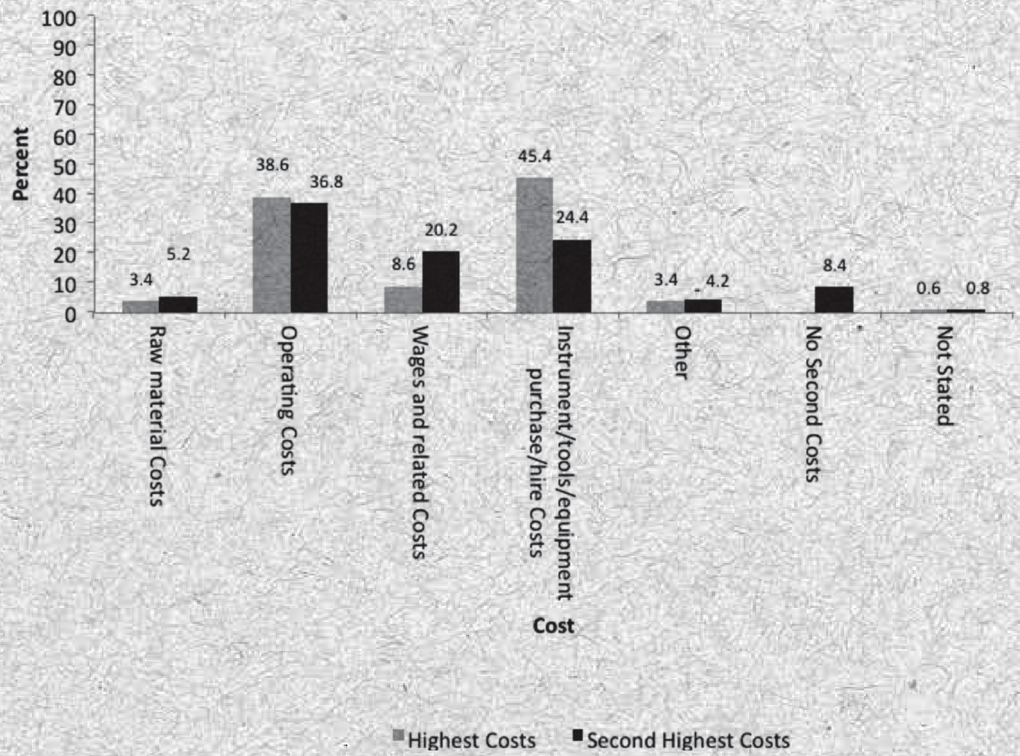
Figure 5.1.8: Percent Distribution of Institutions in the Performance and Celebrations Domain by Annual Income in the Year 2011, CSS Zimbabwe, 2012



Costs

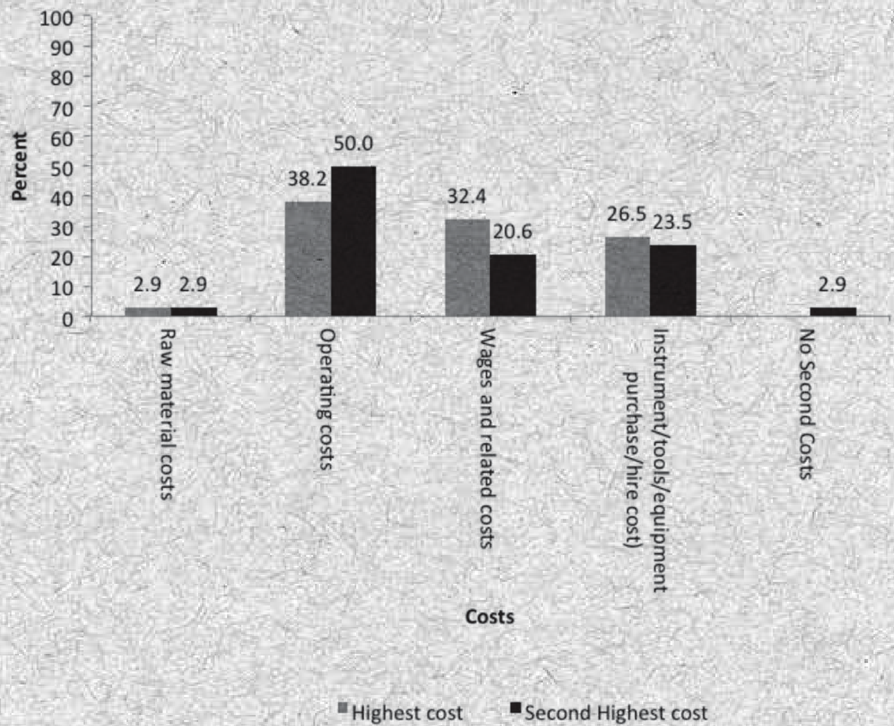
Figure 5.1.11 below shows percent distribution of individual artists in the Performance and Celebrations domain by cost in their business operations. Individual artists were asked to indicate the highest and second highest costs in their operations. Forty-five percent of the individual artists cited instruments/ tools/equipment hire as the highest cost while 39 percent cited operating cost. About 37 percent reported operating cost as the second highest cost.

Figure 5.1.11: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Cost, CSS Zimbabwe, 2012



Operating cost was rated by 38 percent of the institutions whereas 50 percent rated it as the second highest. Wages and related costs were rated as the highest by 32 percent while 21 percent cited them as the second highest. Twenty seven percent reported hiring and purchasing of instruments, tools and equipment as the highest whereas 24 percent reported it as second highest as presented in Figure 5.1.12 below.

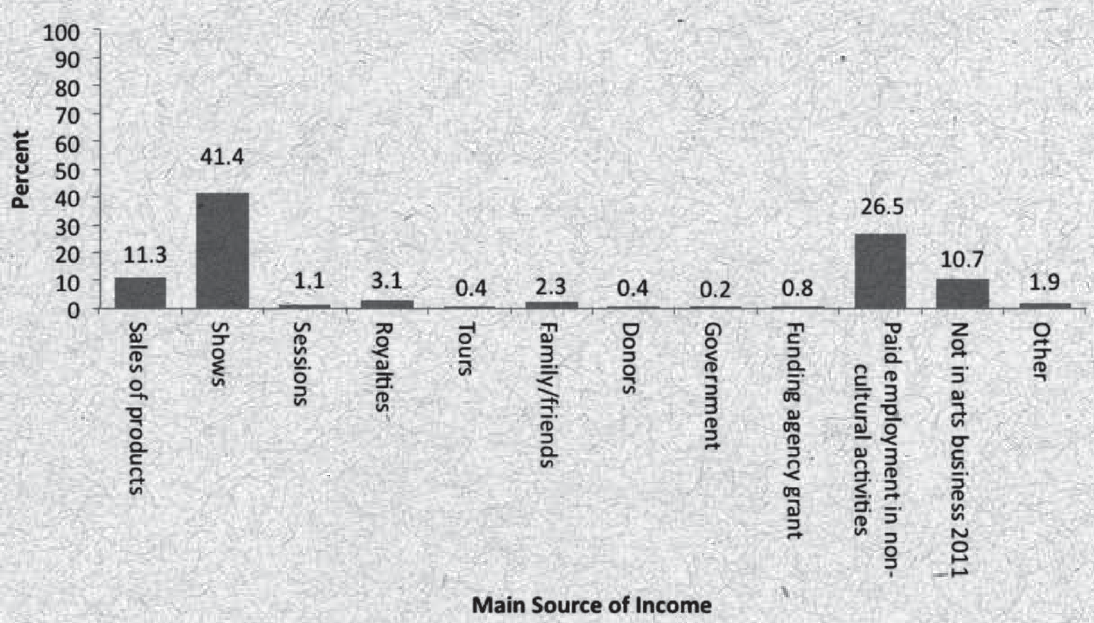
Figure 5.1.12: Percent Distribution of Institution in the Performance and Celebrations Domain by Cost, CSS Zimbabwe, 2012



Main Source of Income in 2011

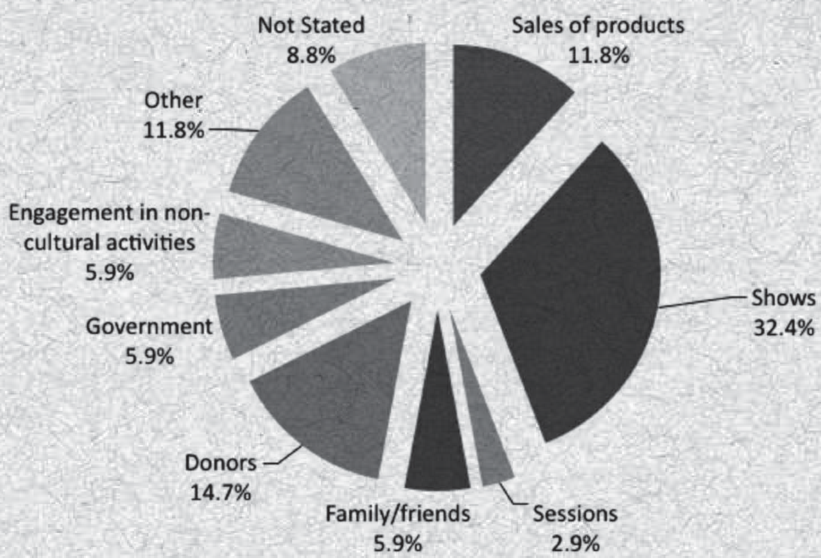
The main source of income for individual artists in the Performance and Celebrations domain was reported to be shows and exhibitions (41.4 percent). About 26 percent reported that their main source of income was paid employment outside of cultural activities. This suggests that there is a significant number of artists who actually have other jobs as their main occupation but also take part in cultural activities as a part-time activity as shown in Figure 5.1.13 below.

Figure 5.1.13: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Main Source of Income in 2011, CSS Zimbabwe, 2012



It was found that among institutions in the Performance and Celebrations domain, shows and exhibitions were the main sources of income for 32 percent of them while 15 percent relied mainly on donors as a source of income. Close to 12 percent reported direct sales of products as their top earner. Sessions were the leading source of income for only 3 percent as shown in Figure 5.1.14 below.

Figure 5.1.14: Percent Distribution of Institution in the Performance and Celebrations Domain by Main Source of Income in 2011, CSS Zimbabwe, 2012



Secondary Source of Income in 2011

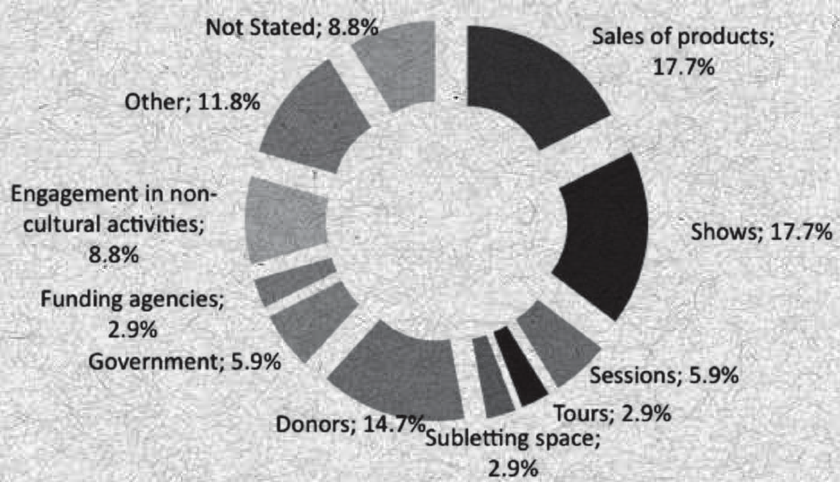
The other main source of income for the individual artists in the Performance and Celebrations domain was reported to be shows and direct sales of products 15 percent each. This was followed by paid employment in non-cultural activities reported by 12 percent of the artists shown in Table 5.1.3 below.

Table 5.1.3: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Secondary Source of Income in 2011, CSS Zimbabwe, 2012

Source of Income	Percent	Number
Direct sales of products	15.1	71
Shows	15.1	71
Sessions	1.5	7
Royalties	9.2	43
Tours	0.6	3
Family/friends	4.3	20
Subletting space	1.3	6
Donors	0.4	2
Funding agency grant	0.9	4
Paid employment in non-cultural activities	12.4	58
No secondary source	37.0	173
Other	1.9	9
Not Stated	0.2	1
Total	**100**	**468**

Sales of products as well as shows were the second highest source of income for institutions in the Performance and Celebrations domain. Donors were cited by close to 15 percent of the institutions as the second highest source as shown in Figure 5.1.15 below.

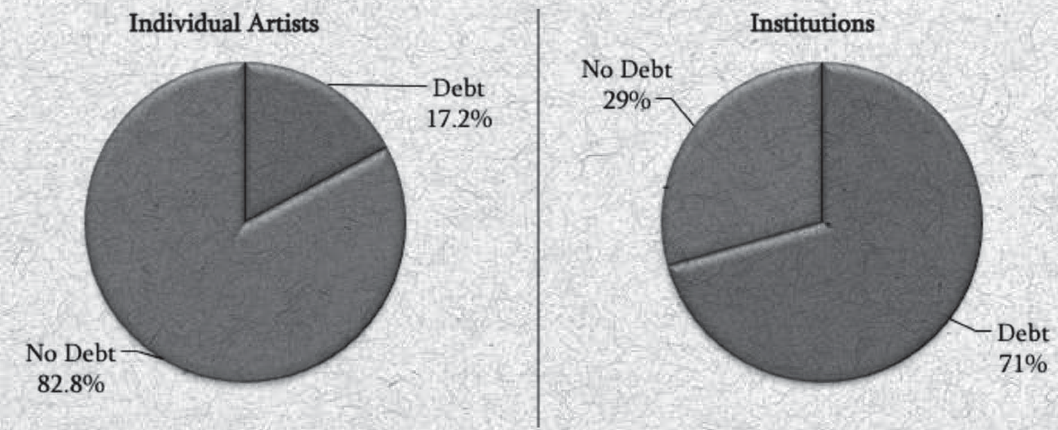
Figure 5.1.15: Percent Distribution of Institutions in the Performance and Celebrations Domain by Secondary Source of Income in 2011, CSS Zimbabwe, 2012



5.1.5 DEBTS/LIABILITIES

About 17 percent of individual artists in the Performance and Celebrations domain indicated that they had incurred some debt whilst 71 percent of institutions indicated that they had debts as shown in Figure 5.1.16 below.

Figure 5.1.16: Percent Distribution of Individual Artists and Institutions in the Performance and Celebrations Domain by Whether or not they had Debts, CSS Zimbabwe, 2012



A quarter (24.4 percent) of those individual artists who were in debt indicated that their debt ranged between US$500 and US$999. Twenty two percent had debt ranging between US$200 and US$499 while 14 percent had debt between US$2 000 and US$4 999. See Table 5.1.4 below.

Table 5.1.4: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

Estimate of Debts (USD)	Percent	Number
$1 - $99	8.9	8
$100 - $199	2.2	2
$200- $499	22.2	20
$500 - $999	24.4	22
$1 000 - $1 499	8.9	8
$1 500 - $1 999	5.6	5
$2 000- $4 999	14.4	13
$5 000 - $9 999	6.7	6
$10 000 - $14 999	3.3	3
Above $20 000	1.1	1
Not Stated	2.2	2
Total	**100**	**90**

About 17 percent each of the institutions which had debts indicated that their debts ranged between US$1 000 and US$4 999, US$5 000 and US$9 999 and between US$15 000 and US$19 999 as shown in Table 5.1.5 below.

Table 5.1.5: Percent Distribution of Institutions in the Performance and Celebrations Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

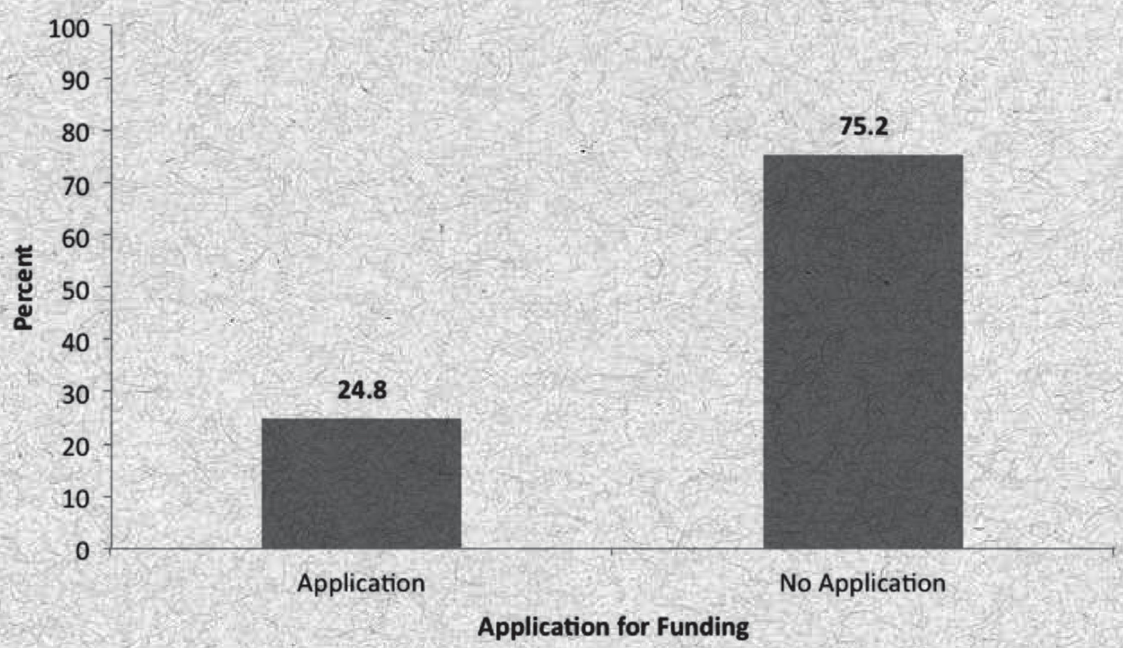
Estimate of Debts (USD)	Percent	Number
$1 - $499	4.2	1
$500 - $999	8.3	2
$1 000- $4 999	16.7	4
$5 000 - $9 999	16.7	4
$10 000 - $14 999	4.2	1
$15 000 - $19 999	16.7	4
$20 000 - $49 999	8.3	2
$50 000- $99 999	12.5	3
Above $100 000	8.3	2
Not Stated	4.2	1
Total	**100**	**24**

5.1.6 FUNDING AND MARKETING

Application for Funding

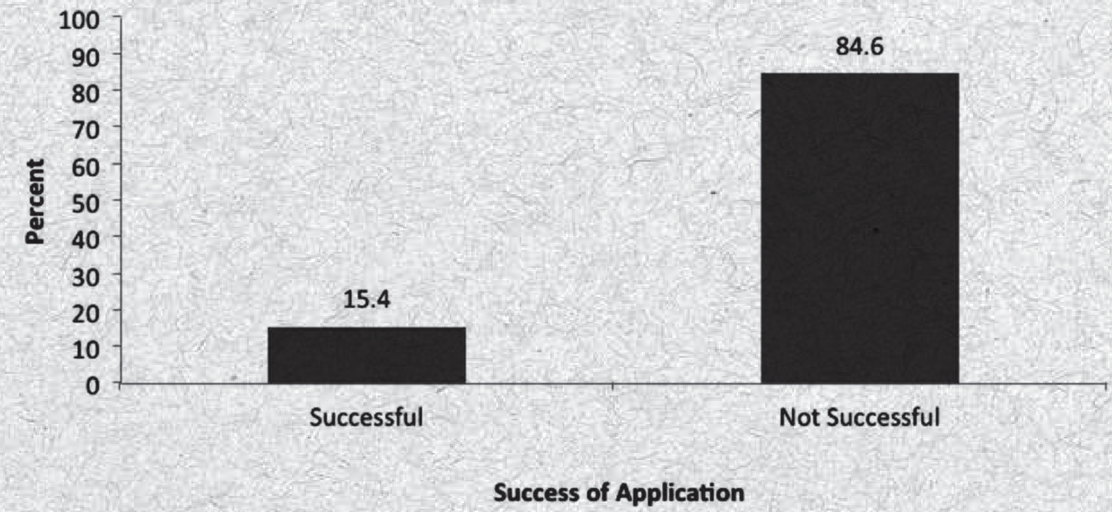
Figure 5.1.17 below shows the distribution of individual artists by whether or not they had applied for funding in the last two years. About 3 out of 4 (75.2 percent) individual artists in the Performance and Celebrations domain indicated that they had not applied for funding in the two years preceding the survey.

Figure 5.1.17: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Application for Funding, CSS Zimbabwe, 2012



Of the individual artists in the Performance and Celebrations domain who had applied for funding, about 15 percent managed to secure it as shown in Figure 5.1.18 below.

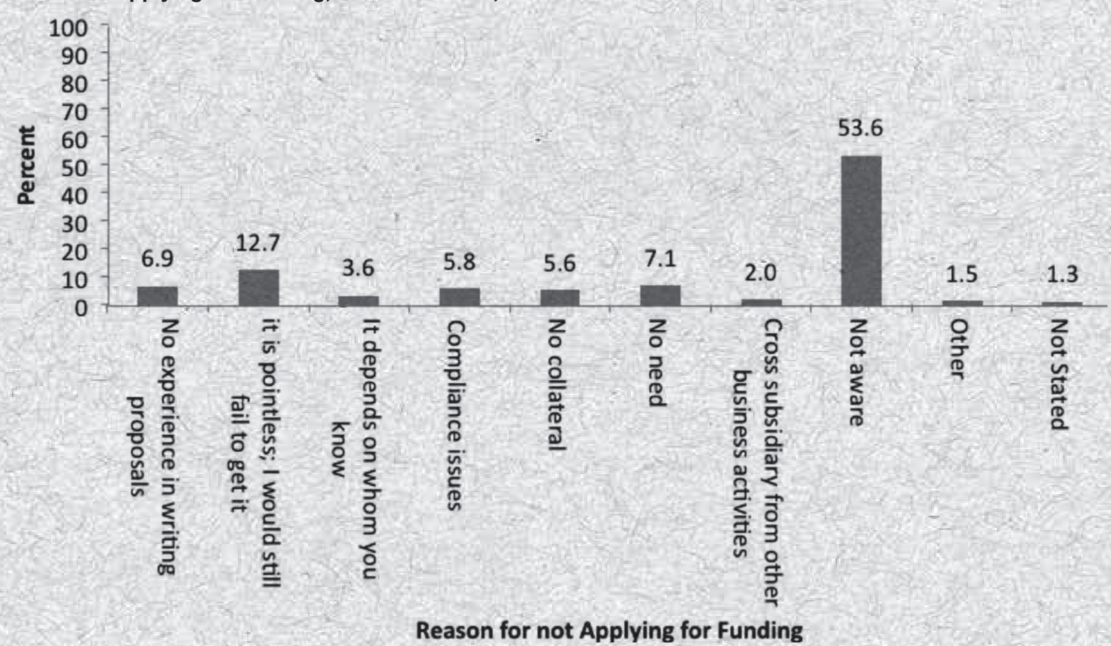
Figure 5.1.18: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Success of Application for Funding, CSS Zimbabwe, 2012



Main Reason for not Applying for Funding

All individual artists in the Performance and Celebrations domain who indicated that they had not applied for funding in the two years preceding the survey were asked the major reason for not applying. Figure 5.1.19 show the distribution of the major reasons for not applying. Fifty-four percent of the artists reported "Not aware" as the major reason for not applying for funding followed by 13 percent who indicated that "It is pointless: I would still fail to get it". "No need" and "No experience in writing proposals" were each indicated by 7 percent of the artists as shown in Figure 5.1.20 below.

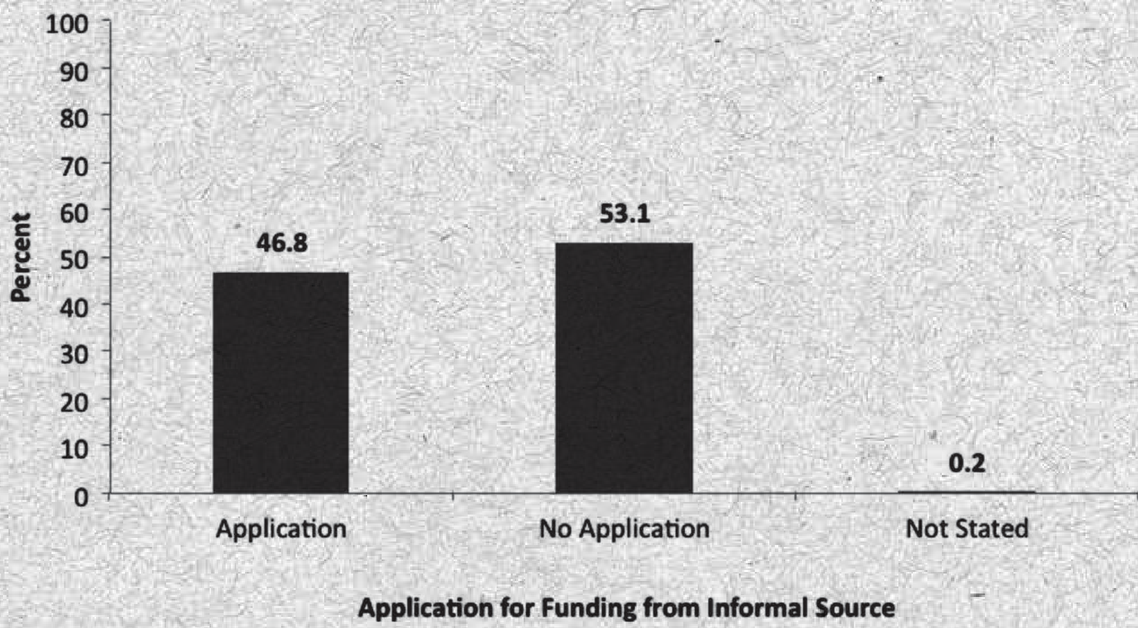
Figure 5.1.19: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Main Reason for not Applying for Funding, CSS Zimbabwe, 2012



Funding from Informal Sources

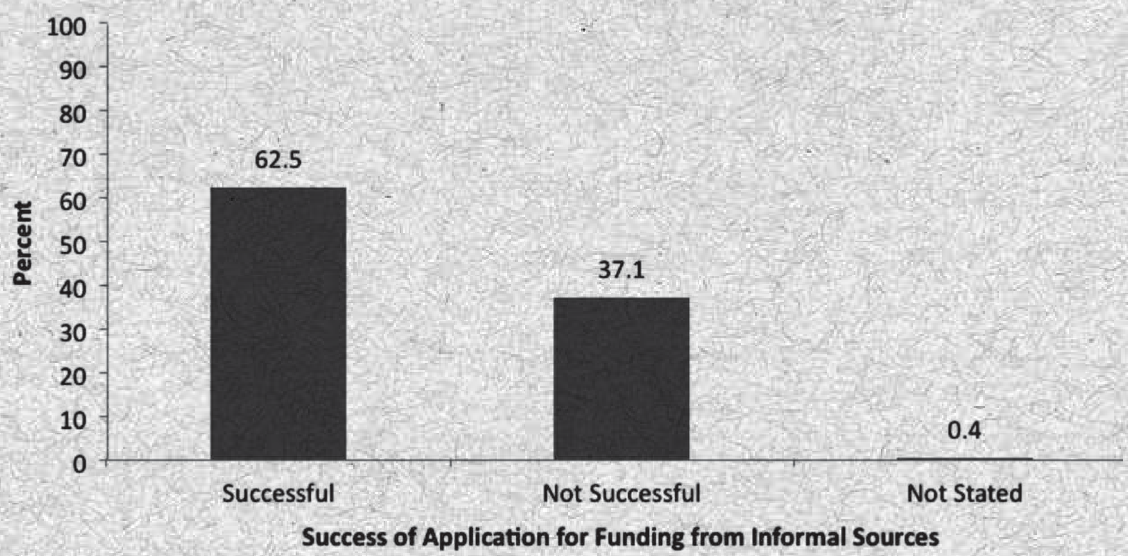
All individual artists in the Performance and Celebrations domain were asked if, in the two years preceding the survey, they had tried to get money from informal sources such as unregistered money lender, friend or relative. Fifty-three percent of the artists indicated that they had not tried to get money from informal sources while 47 percent indicated that they sought money from informal sources as shown in Figure 5.1.20 below.

Figure 5.1.20: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Application to Informal Funding Sources, CSS Zimbabwe, 2012



The individual artists who indicated that they had tried to get money from informal sources were asked about the outcome of their efforts. About 63 percent indicated that they had received money from informal sources whilst 37 percent were not successful in their attempts as shown in Figure 5.1.21 below.

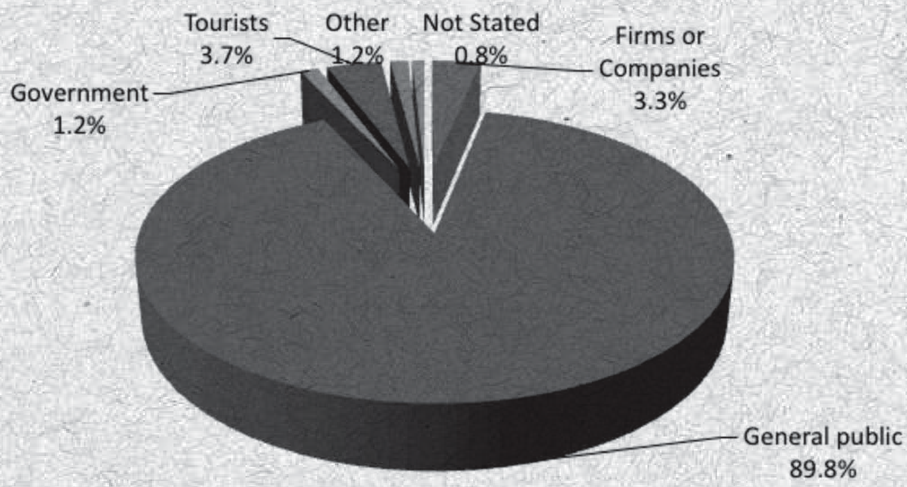
Figure 5.1.21: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Outcome of Application to Informal Funding Sources, CSS Zimbabwe, 2012



Marketing of Products

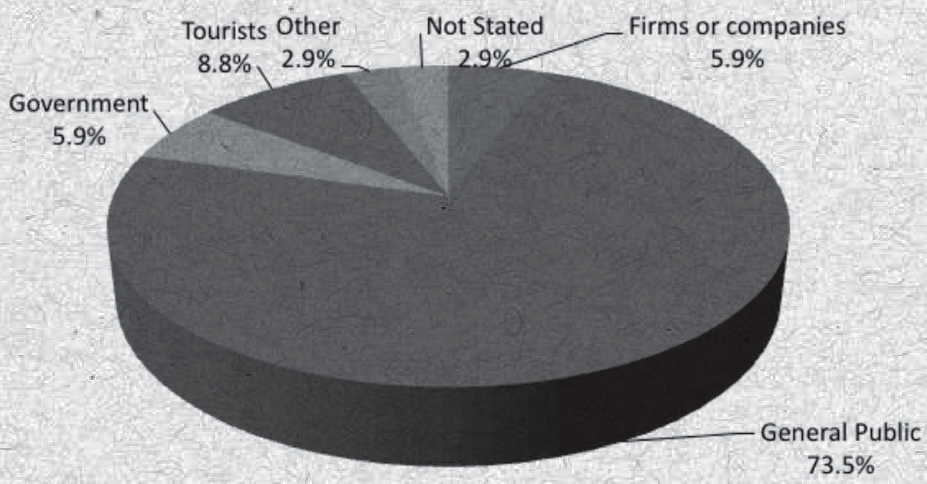
Almost 90 percent of the individual artists in the Performance and Celebrations domain indicated that the general public was the main market for their products. About 4 percent and 3 percent reported tourists and firms or companies as their main market, respectively. See Figure 5.1.22 below.

Figure 5.1.22: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Main Market for Products, CSS Zimbabwe, 2012



The distribution of main markets for institutions in the Performance and Celebrations domain is shown in Figure 5.1.23 below. About 74 percent of the institutions in the domain indicated that the general public was the main market for their products. About 9 percent of the institutions reported tourists as their main market.

Figure 5.1.23: Percent Distribution of Institutions in the Performance and Celebrations Domain by Main Market for Products, CSS Zimbabwe, 2012



Three out of every four artists (75.1 percent) in the Performance and Celebrations domain indicated that they sold their product in Zimbabwe market. Twenty-three percent of the artists sold their products in and outside Zimbabwe while almost 2 percent of them sold their products outside the country. See Figure 5.1.24 below.

Figure 5.1.24: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Where They Sell Their Products, CSS Zimbabwe, 2012

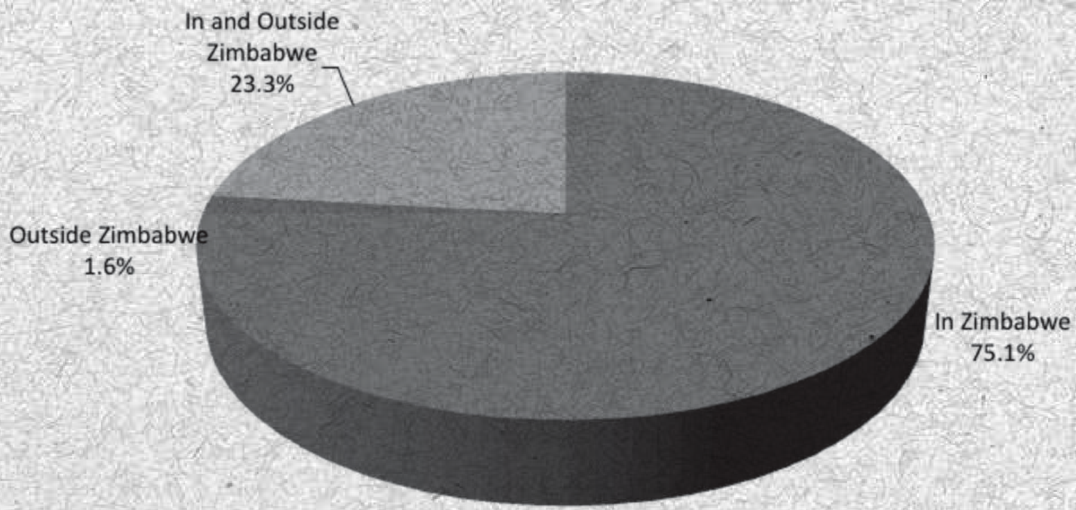
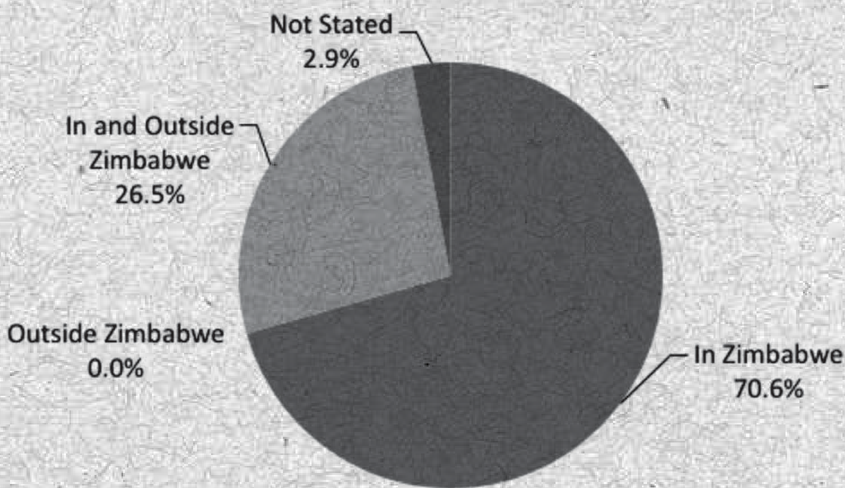


Figure 5.1.25 below depicts the distribution of markets for the products from institutions in the Performance and Celebrations domain. Seventy-one percent of the institutions in this domain indicated that they sold their products in the country and 27 percent of them sold their products in and outside Zimbabwe.

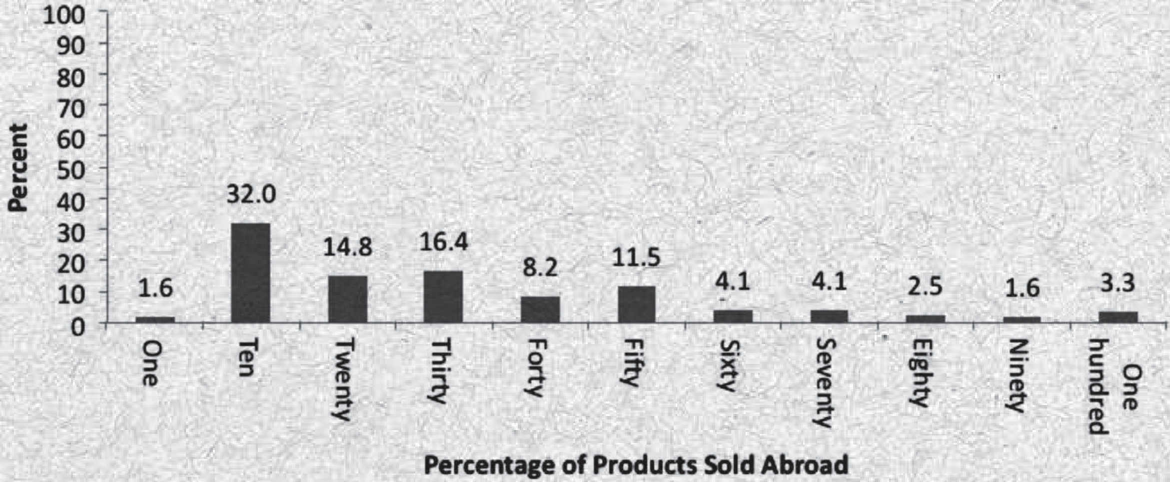
Figure 5.1.25: Percent Distribution of Institutions in the Performance and Celebrations Domain by Where They Sell Their Products, CSS Zimbabwe, 2012



External Markets

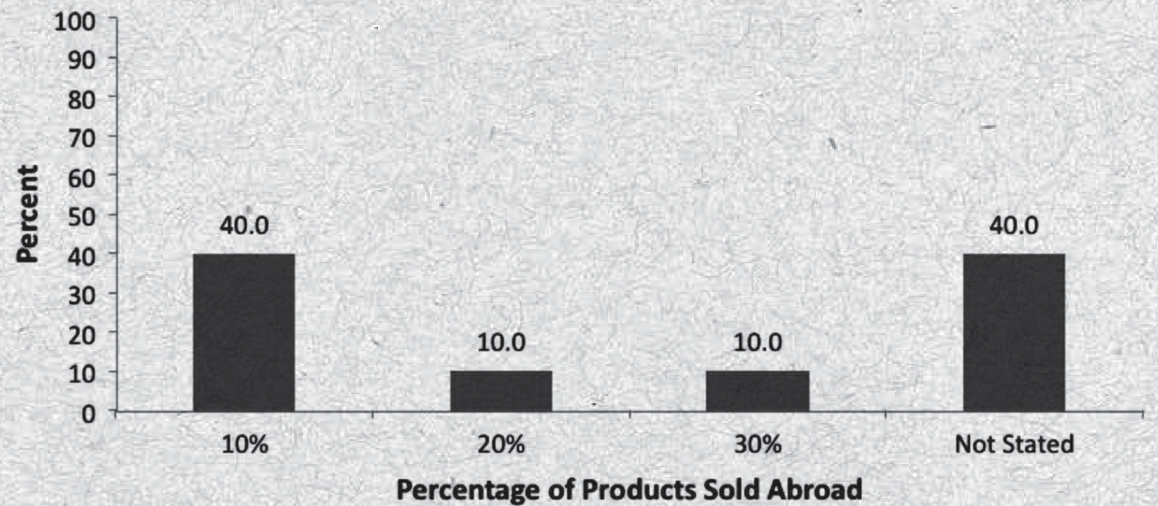
Among the artists in the Performance and Celebrations domain who sold products abroad, 32 percent indicated that they had sold ten percent, 16 percent had sold thirty percent and 15 percent indicated twenty percent as the percentage of products they had sold abroad. Slightly over three percent of the artists indicated they exclusively sold their products abroad.

Figure 5.1.26: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by Percentage of Products Sold Abroad, CSS Zimbabwe, 2012



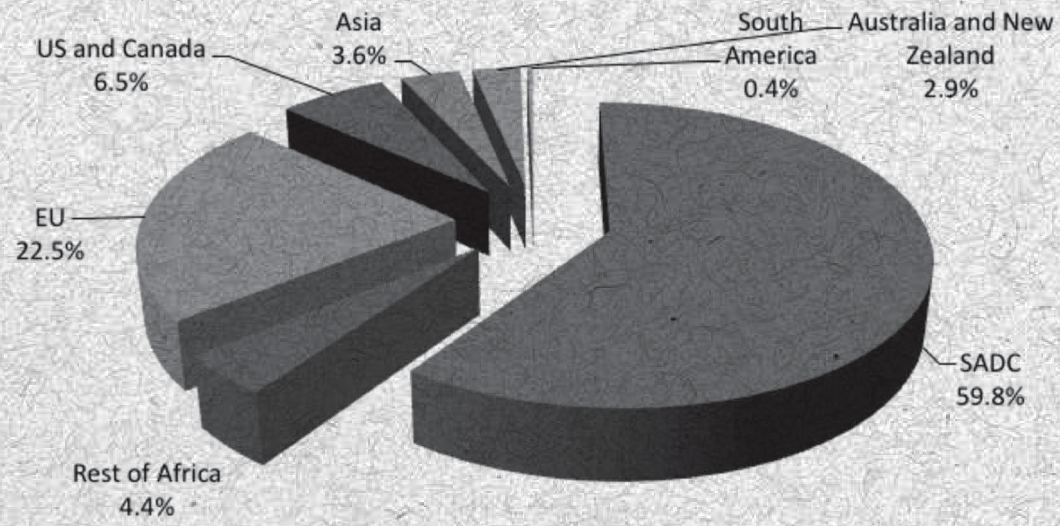
Among the institutions in the Performance and Celebrations domain who sold products abroad, 40 percent indicated that they had sold ten percent. Ten percent had sold 20 percent and another 10 percent had sold thirty percent of their products abroad. See Figure 5.1.27 below.

Figure 5.1.27: Percent Distribution of Institutions in the Performance and Celebrations Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



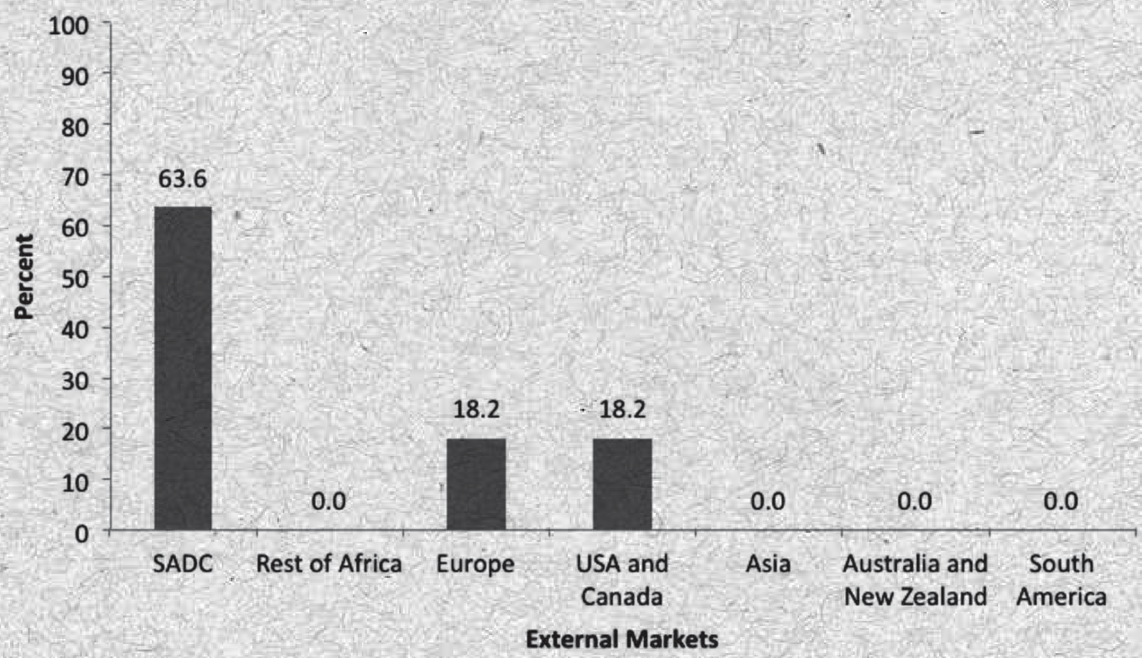
Individual artists who indicated that they had sold their products outside the country were asked to mention the countries where they had sold the products. Three out of every five of the artists cited SADC countries, 23 percent indicated EU countries and 7 percent mentioned the US and Canada. See Figure 5.1.28 below.

Figure 5.1.28: Percent Distribution of Individual Artists in the Performance and Celebrations Domain by External Markets, CSS Zimbabwe, 2012



Among the institutions that sold products outside the country, 64 percent cited countries in the SADC region, 18 percent indicated EU countries and another 18 percent reported the USA and Canada as the external markets for their products. See Figure 5.1.29 below.

Figure 5.1.29: Percent Distribution of Institutions in the Performance and Celebrations Domain by External Markets, CSS Zimbabwe, 2012



VISUAL ARTS AND CRAFTS

5.2 VISUAL ARTS AND CRAFTS

5.2.1 INTRODUCTION

Visual Arts are art forms that focus on the creation of works, which are visual in nature. They are intended to appeal to the visual sense and can take many forms. Although it is acknowledged that some contemporary visual arts may include multidisciplinary art forms such as 'virtual art' and these art forms are included in Audio-visual and Interactive Media domain.

The Visual Arts and Crafts domain includes fine arts such as paintings, drawings, sculpture, photography; and crafts such as basketry, crocheting, beadwork and pottery. Commercial places where the objects are exhibited, such as commercial art galleries, are also included in this domain.

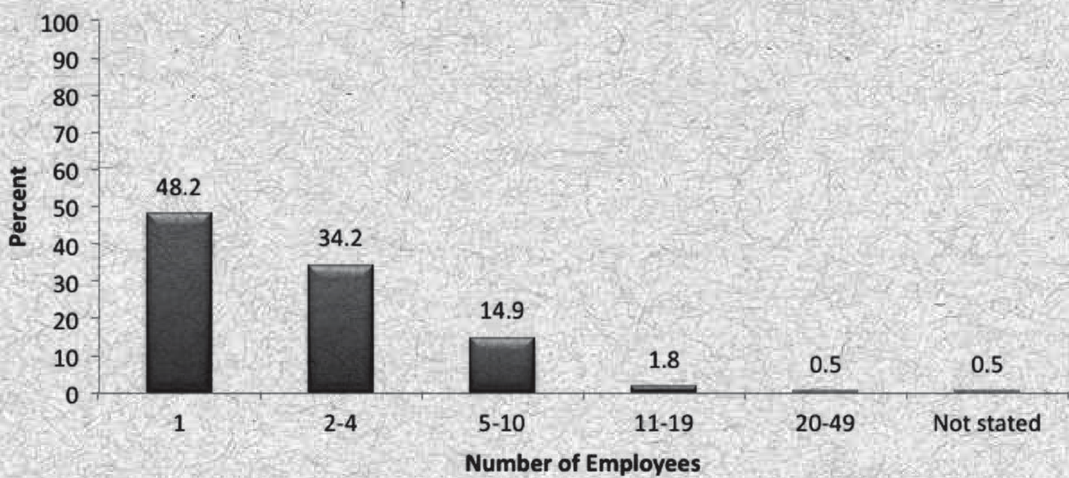
The 2009 FCS adopts the International Trade Center (ITC) and UNESCO definition of Crafts, or artisanal products, described as "those produced by artisans, either completely by hand or with the help of hand-tools or even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product. The special nature of artisanal products derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, religiously and socially symbolic and significant" (UNESCO and ITC, 1997).

UNESCO (UNESCO and ITC, 1997) has identified six broad categories of artisanal products based on the materials used: Baskets/wickers/vegetable fibre-works; Leather; Metal; Pottery; Textiles and Wood. The guide also identifies complementary categories comprising materials in craft production that are either very specific to a given area, or rare, or difficult to work, such as stone, glass, ivory, bone, shell, mother-of-pearl, etc. Extra categories are also identified when different materials and techniques are applied at the same time and refer to decorations, jewellery, musical instruments, toys, and works of art. Many crafts objects are produced industrially; nevertheless, FCS considers the products, which have a traditional character (pattern, design, technology or material) as part of the FCS. Contemporary crafts are not in Visual Arts and Crafts, but are included in the Design and Creative Services domain[6].

5.2.2 EMPLOYMENT

The survey asked questions on the number of employees, the nature and length of contracts, the average income and membership of cultural associations. The distribution of individual artists interviewed in the Visual Arts and Crafts domain by number of employees is presented in Figure 5.2.1. Forty-eight percent of the individual artists work as individuals and 34 percent had 2 to 4 employees.

Figure 5.2.1: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Number of Employees, CSS Zimbabwe, 2012



[6] *The 2009 UNESCO Framework for Cultural Statistics*

For institutions in this domain, 26 percent had 2 to 4 employees as presented in Figure 5.2.2. Twenty percent each had numbers of employees ranging between 5 to 10, 11 to 19 and 50 and above.

Figure 5.2.2: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Number of Employees, CSS Zimbabwe, 2012

Figure 5.2.3 shows the percent distribution of individual artists who were interviewed in the Visual Arts and Crafts domain by the average lengths of contracts of their employees. Over 95 percent of individual artists interviewed had employees with open-ended contracts while close to 4 percent had other types of contracts.

Figure 5.2.3: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Average Lengths of Contracts of Employees, CSS Zimbabwe, 2012

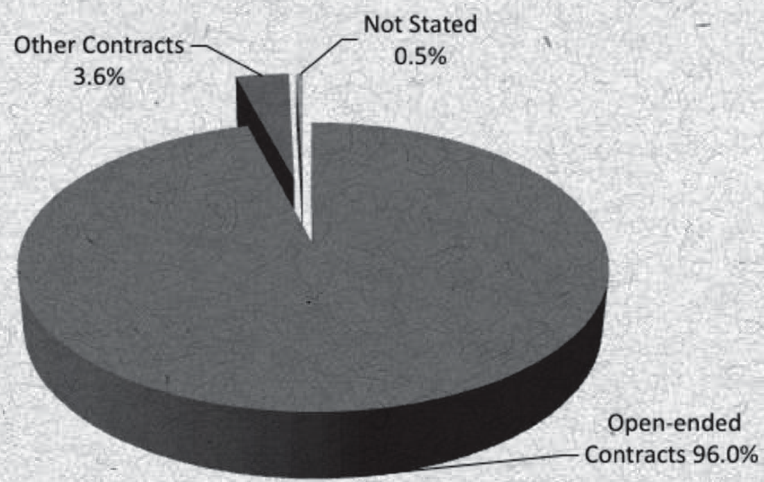
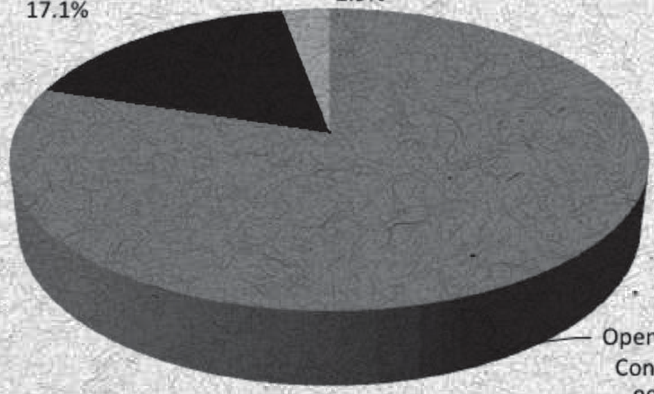


Figure 5.2.4 shows the percent distribution of institutions in the Visual Arts and Crafts domain by the average lengths of contracts for their employees. Over 80 percent of the institutions indicated that their employees had open-ended contracts while 17 percent had employees with other types of contracts.

Figure 5.2.4: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Average Lengths of Contracts of Employees, CSS Zimbabwe, 2012



5.2.3 EDUCATION AND TRAINING

Individual artists were asked about the education and training that the principal owner of the business had received. The information collected was on highest level of education completed, whether or not the owner received training for the job that they were doing, formality of training received and the areas of training.

Highest level of Education Attained by Principal Owners of Businesses

Of the principal owners of businesses in the Visual Arts and Crafts domain, 59 percent had completed or attended secondary education and 30 percent had either higher education or tertiary qualifications. The results are presented in Table 5.2.1 below.

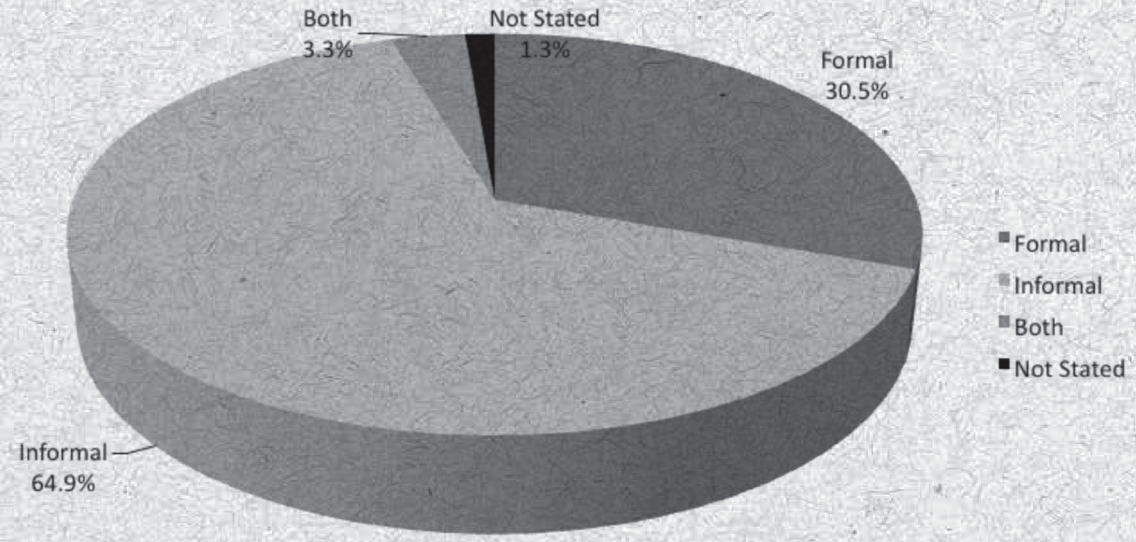
Table 5.2.1: Highest Level of Education Attained by Principal Owners of Businesses in the Visual Arts and Crafts Domain, CSS Zimbabwe, 2012

Highest Level of Education	Percent	Number
Primary (1 to 7)	7.7	17
Secondary (1 to 4)	59.0	131
‘A” Level (5 to 6)	3.2	7
Certificate after Primary	0.5	1
Certificate after Secondary ('O' Level)	10.4	23
Certificate after 'A' Level	5.0	11
Diploma after Primary	0.9	2
Diploma after Secondary ('O' Level)	2.7	6
Diploma after 'A' Level	5.4	12
University Degree	5.0	11
Not Stated	0.5	1
Total	**100**	**222**

Training

About 68 percent of owners of businesses in the Visual Arts and Crafts domain had received some form of training. Figure 5.2.5 below shows that of the principal owners of business who had received some form of training, 65 percent and 30 percent received informal and formal training, respectively. Three percent of the owners received both formal and informal training.

Figure 5.2.5: Percent Distribution of Principal Owners of Businesses in the Visual Arts and Crafts Domain who Received Training by Type of Training Received, CSS Zimbabwe, 2012



A majority of owners (96.7 percent) indicated that they received training in technical skills or apprenticeship. About five percent received training on business management. The results are presented in Figure 5.2.6 below.

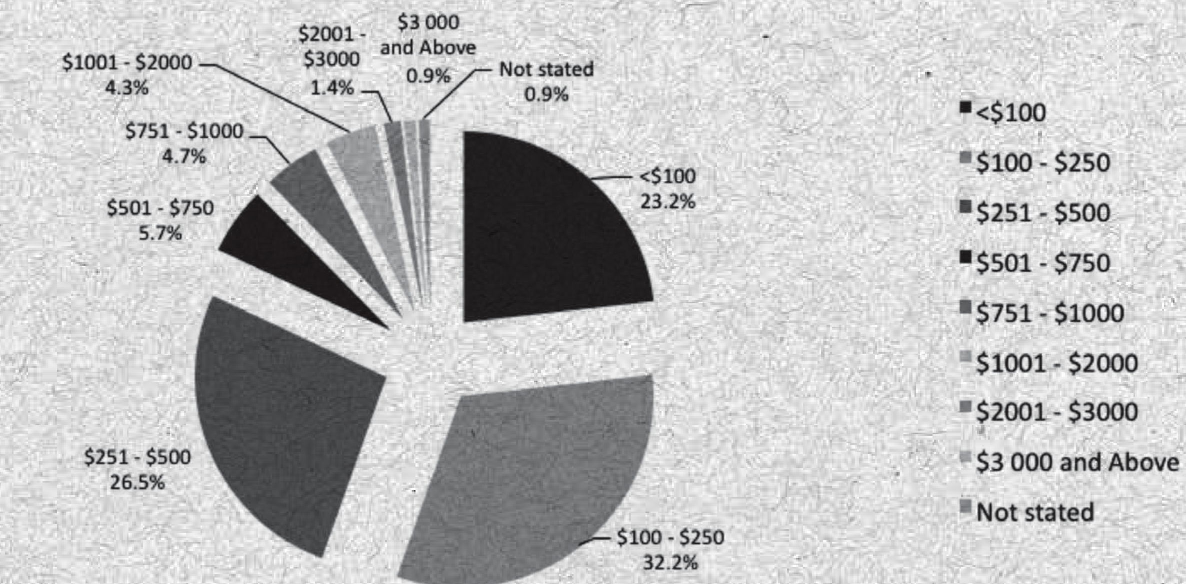
Figure 5.2.6: Percent Distribution of Principal Owners of Businesses in the Visual Arts and Crafts Domain by Area of Training Received, CSS Zimbabwe, 2012

5.2.4 INCOME AND EXPENDITURE

Income in 2011

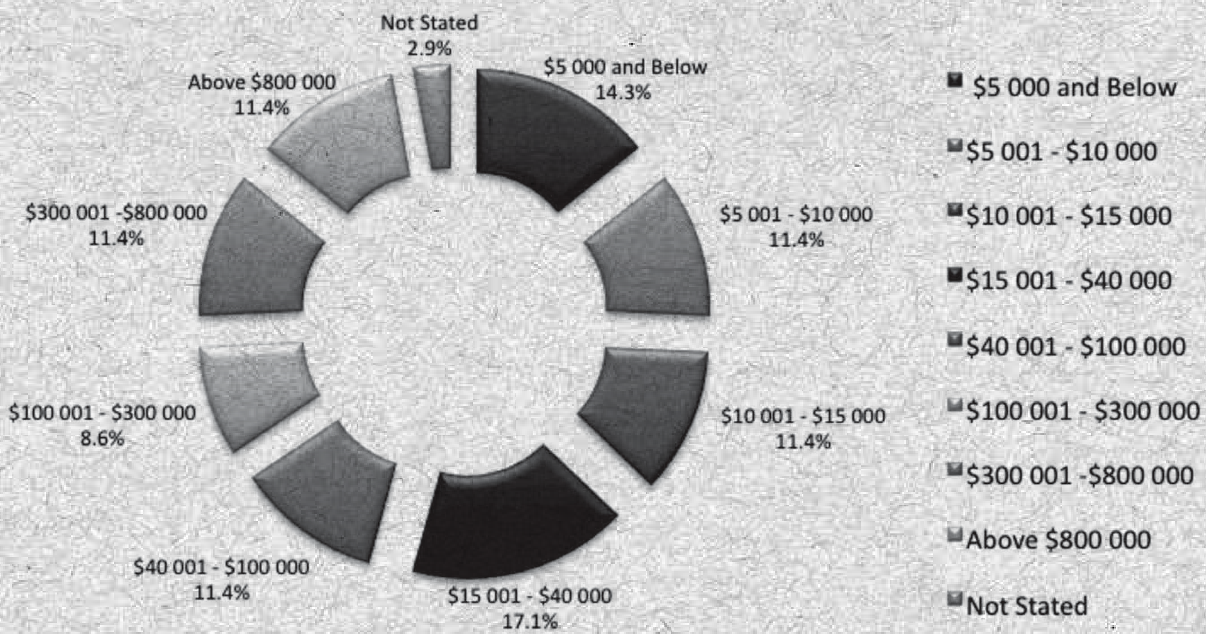
Thirty-two percent of the individual artists involved in the Visual Arts and Crafts domain had an average monthly income of between US$100 and US$250 in the year 2011. About 27 percent earned an average monthly income of between US$251 and US$500 as presented in Figure 5.2.7 below.

Figure 5.2.7: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Average Monthly Income in the Year 2011, CSS Zimbabwe, 2012



The annual income for 14 percent of the institutions in the Visual Arts and Crafts domain was US$5 000 and below whilst for 11 percent of institutions was more than US$800 000. Seventeen percent of the institutions had between US$15 001 and US$40 000. See Figure 5.2.8 below.

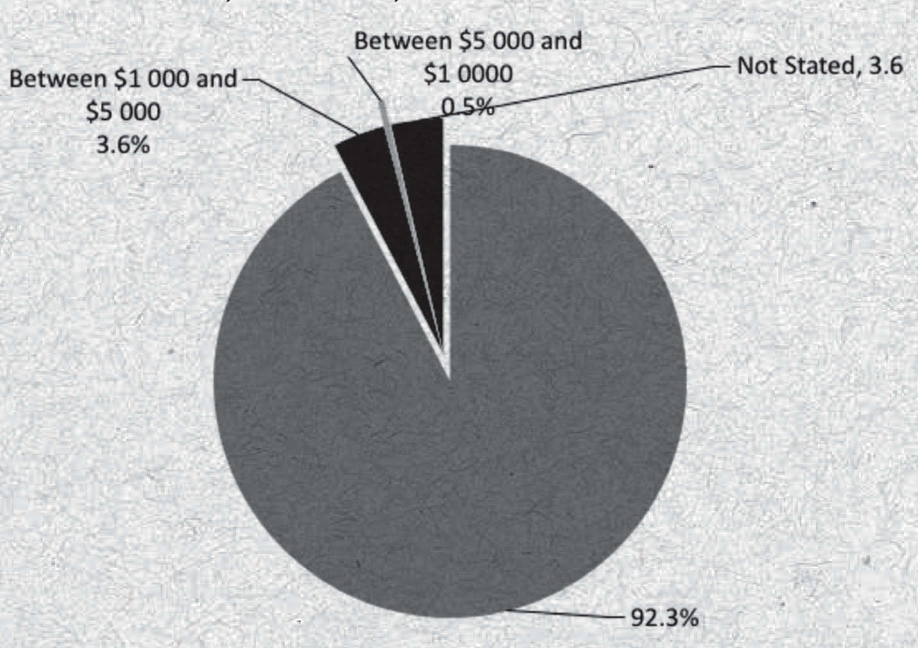
Figure 5.2.8: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Annual Income for the Year 2011, CSS Zimbabwe, 2012



Expenditure in 2011

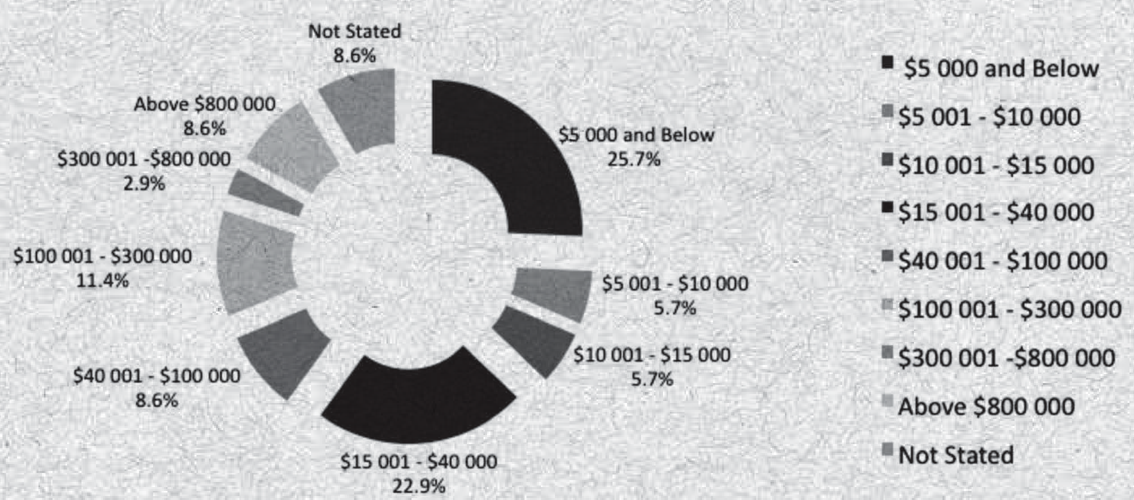
Ninety-two percent of individual artists in the Visual Arts and Crafts reported that their average monthly expenditures for the year were less than US$1 000. See Figure 5.2.9 below.

Figure 5.2.9: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Average Monthly Expenditure in the Year 2011, CSS Zimbabwe, 2012



About 27 percent of institutions in the Visual Arts and Crafts domain reported that their expenditures were US$5 000 and below whilst 8.6 percent were more than US$800 000. Twenty-three percent had expenditures between US$15 001 and US$40 000. See Figure 5.2.10 below.

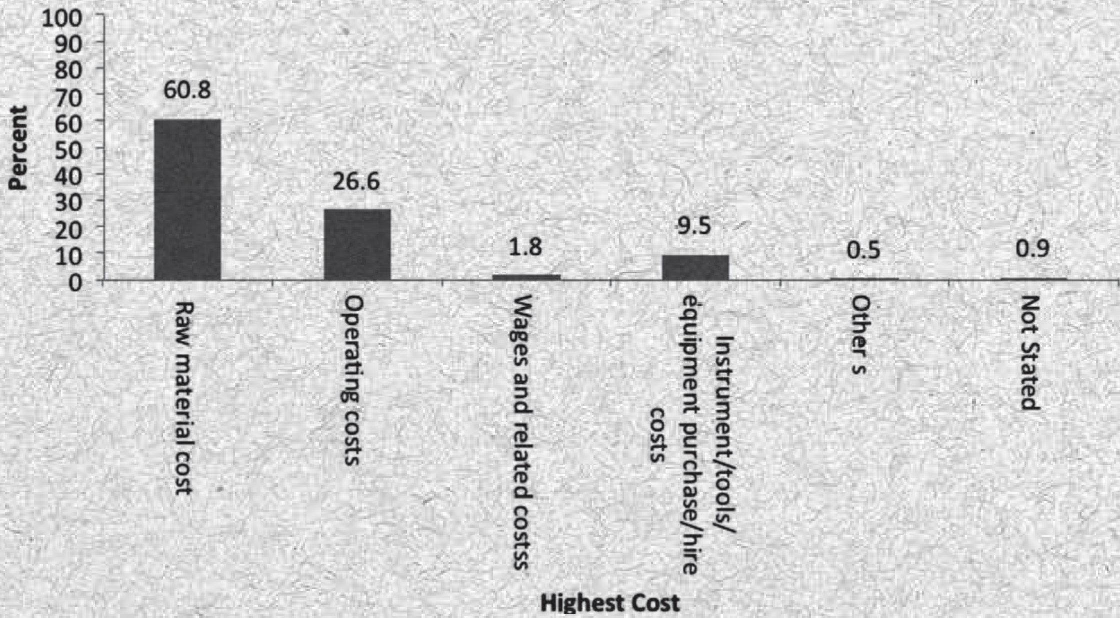
Figure 5.2.10: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Annual Expenditure in the Year 2011, CSS Zimbabwe, 2012



Highest Cost

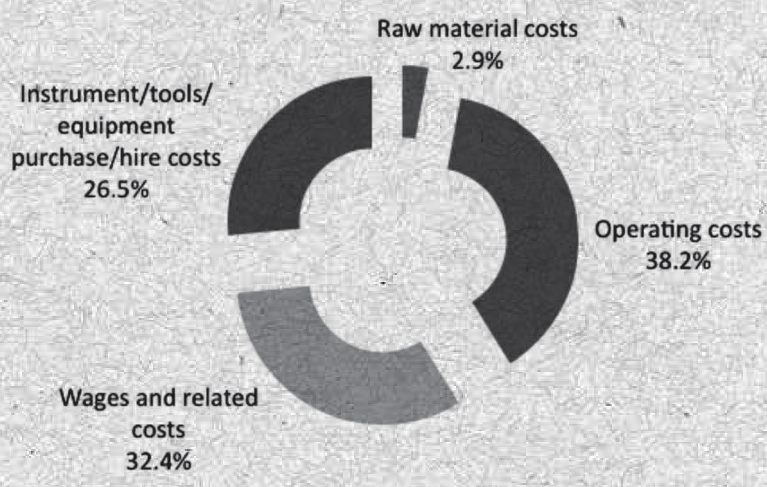
Individual artists were asked to indicate what they spent most of their money on in their businesses. About 61 percent of individual artists in the Visual Arts and Crafts domain reported raw material costs followed by operating costs. See Figure 5.2.11 below.

Figure 5.2.11: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Main Business Costs, CSS Zimbabwe, 2012.



Institutions were asked to indicate what they spent most of their money on in their businesses. For institutions in the Visual Arts and Crafts domain, 38 percent indicated operating costs while 32 percent cited wages and related costs. Almost 27 percent cited equipment purchase or hire as their highest cost. See Figure 5.2.12 below.

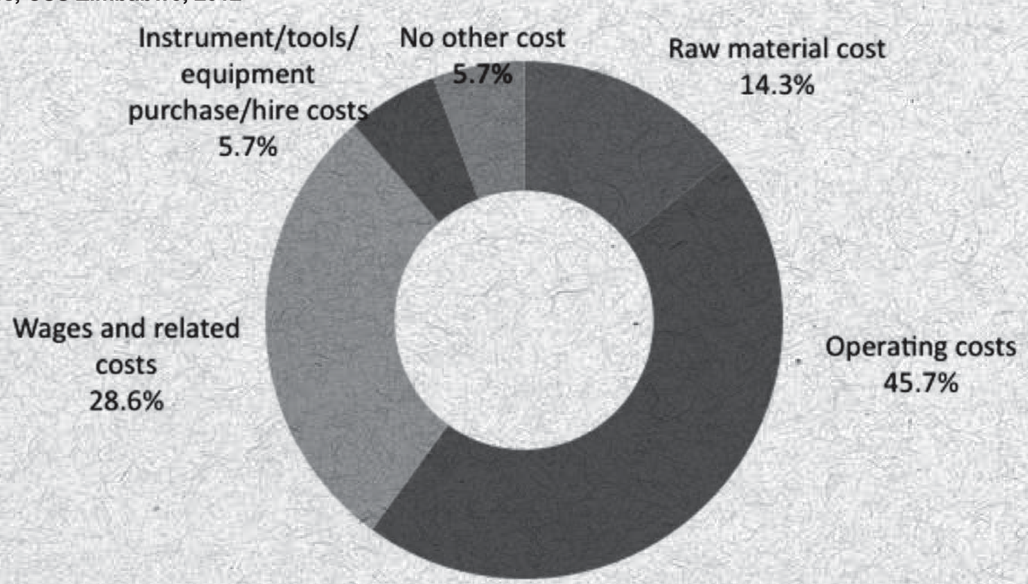
Figure 5.2.12: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Main Business Costs, CSS Zimbabwe, 2012.



Second Highest Cost

Operating costs were cited as the second highest cost by 46 percent of the institutions. Wages and related costs were ranked as the second highest cost by 29 percent of the institutions covered during the survey while 14 percent indicated raw material cost. See Figure 5.2.13 below.

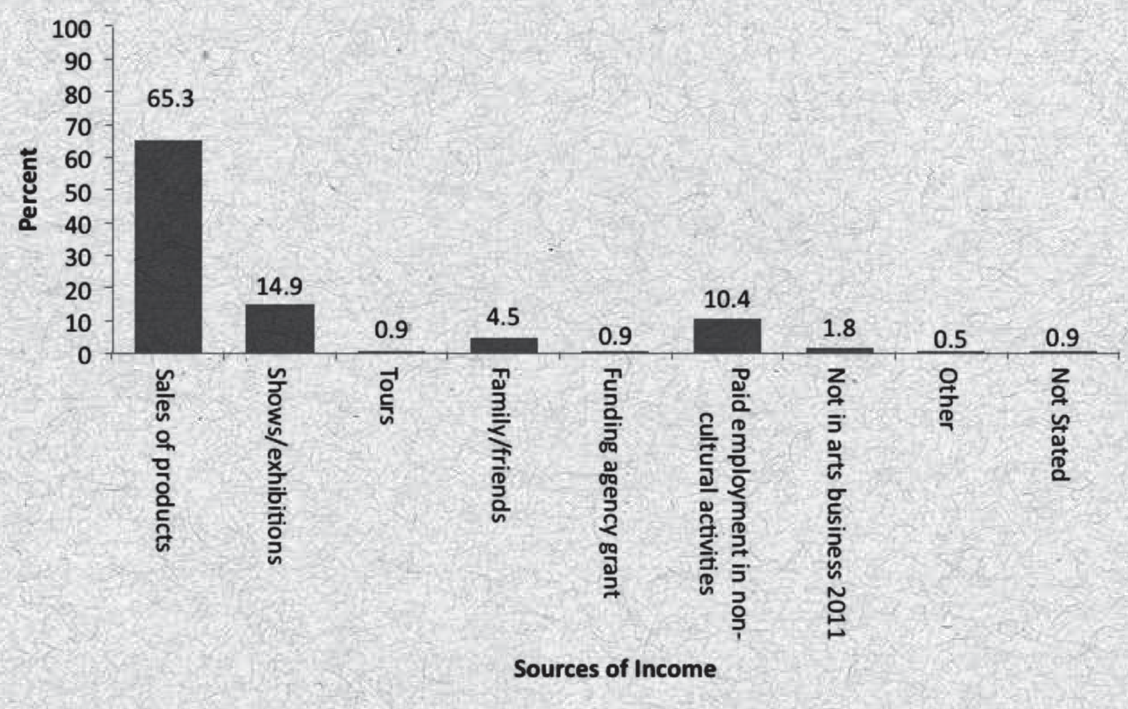
Figure 5.2.13: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Second Highest Cost to Business, CSS Zimbabwe, 2012



Main Source of Income in 2011

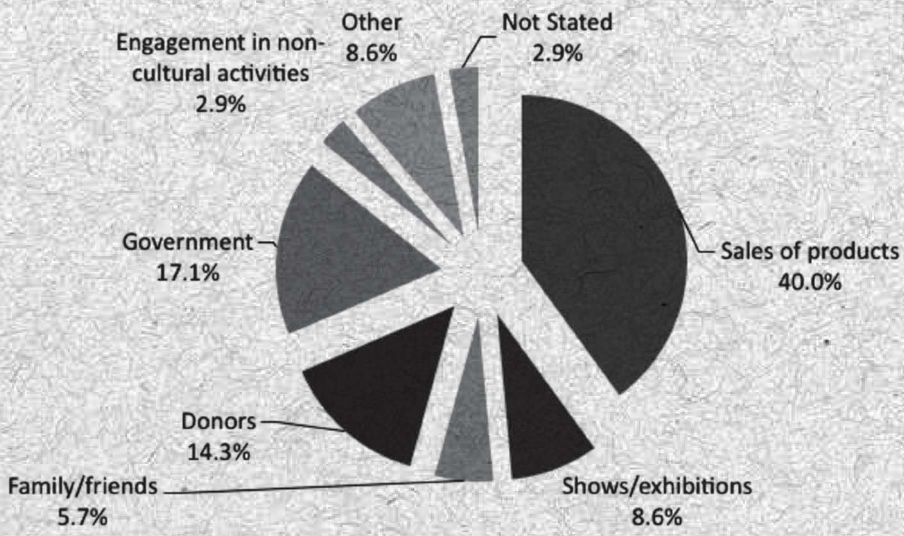
In the Visual Arts and Crafts domain, 65 percent of the individual artists got most of their income from product sales. Close to 15 percent of the individual artists indicated that they got most of their income from shows and exhibitions while just over 10 percent got most of their income from employment in non-cultural activities. See Figure 5.2.14 below.

Figure 5.2.14: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Main Source of Income in 2011, CSS Zimbabwe, 2012



For institutions in this domain, 40 percent of institutions had sales of products as their main source of income. Government and donors were the main source of income for 17 percent and 14 percent of the institutions, respectively, as shown in Figure 5.2.15 below.

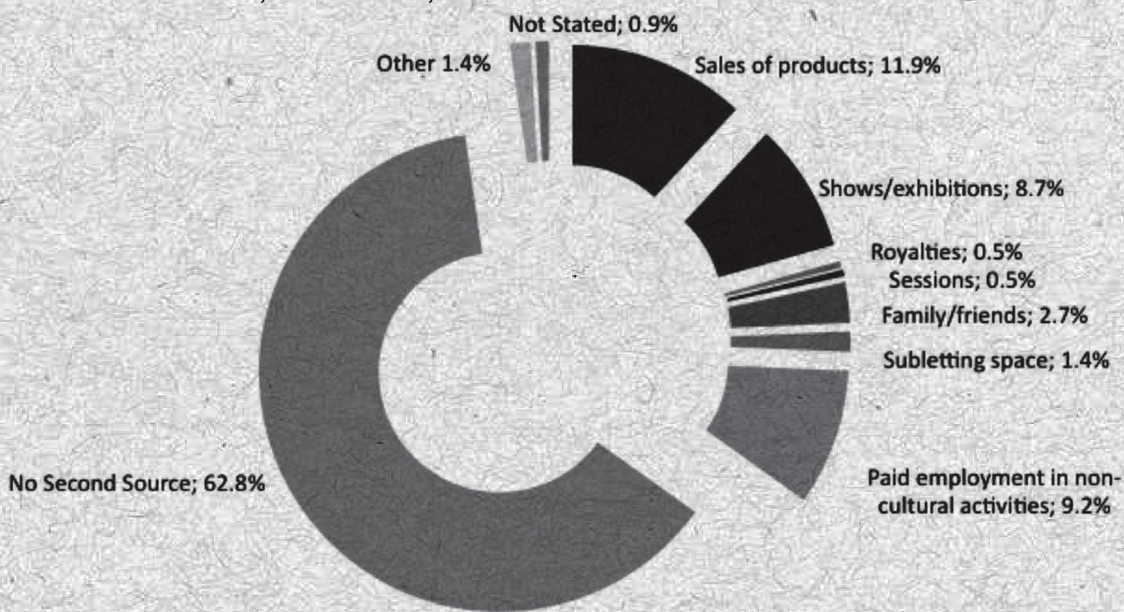
Figure 5.2.15: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Main Source of Income in 2011, CSS Zimbabwe, 2012.



Secondary Source of Income in 2011

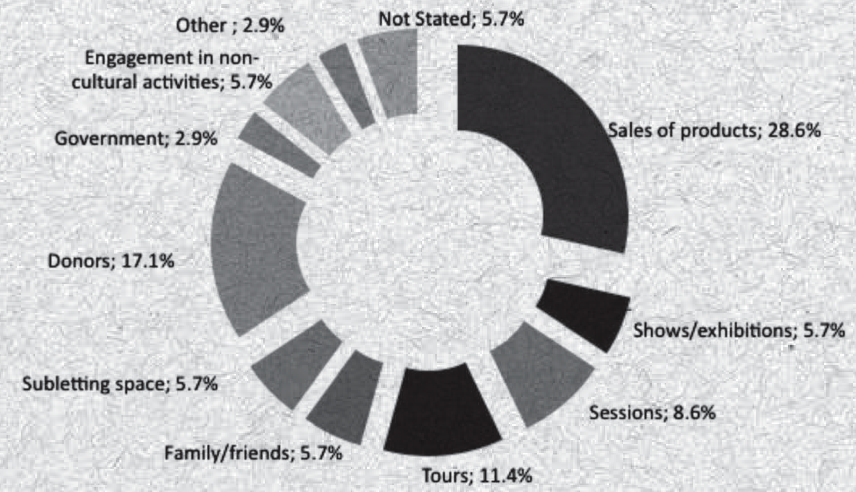
About 12 percent of individual artists involved in the Visual Arts and Crafts domain indicated that the secondary source of income was direct sales of products while 9 percent apiece reported paid employment outside cultural industry and shows and exhibitions. However, 63 percent of the individual artists were not yet in business in the reference period of 2011. See Figure 5.2.16 below.

Figure 5.2.16: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Secondary Source of Income in 2011, CSS Zimbabwe, 2012.



Almost 29 percent of institutions in the Visual Arts and Crafts domain reported sales of products as their secondary source of income. Slightly over 17 percent indicated that donors were their secondary source of income. Tours were reported as the secondary source of income by 11 percent of the institutions. See Figure 5.2.17 below.

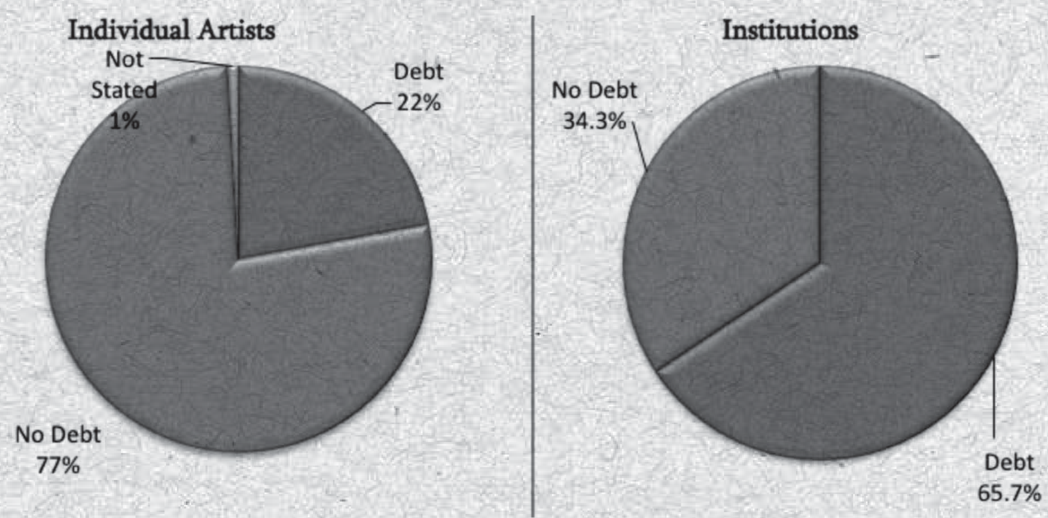
Figure 5.2.17: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Secondary Source of Income in 2011, CSS Zimbabwe, 2012.



5.2.5 DEBTS/LIABILITIES

About 22 percent of individual artists in the Visual Arts and Crafts domain indicated that they had incurred some debt while 66 percent of institutions in the domain indicated that they had debts, as shown in Figure 5.2.18 below.

Figure 5.2.18: Percent Distribution of Individual Artists and Institutions in the Visual Arts and Crafts Domain by Whether or not they had Debts, CSS Zimbabwe, 2012



Twenty-nine percent of individual artists who were in debt indicated that their debts ranged between US$200 and US$499. Eighteen percent of these individual artists had debts ranging between US$500 and US$999 while 16 percent had debts of less than US$100. About 12 percent of the individual artists had debts ranging between US$2 000 and US$4 999 as presented in Table 5.2.2 below.

Table 5.2.2: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

Estimate of Debts (USD)	Percent	Number
$1 - $99	16.3	8
$100 - $199	14.3	7
$200- $499	28.6	14
$500 - $999	18.4	9
$1 000 - $1 499	4.1	2
$1 500 - $1 999	4.1	2
$2 000- $4 999	12.2	6
$5 000- $9 999	0.0	0
$10 000 and above	2.0	1
Total	**100**	**49**

Table 5.2.3 below shows that about 22 percent of indebted institutions had debts ranging between US$5 000 and US$9 999. Seventeen percent of each of these institutions had debt ranging between US$1 000 and US$4 999, US$20 000 and US$49 999 and over US$100 000.

Table 5.2.3: Percent Distribution of Indebted Institutions in the Visual Arts and Crafts Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

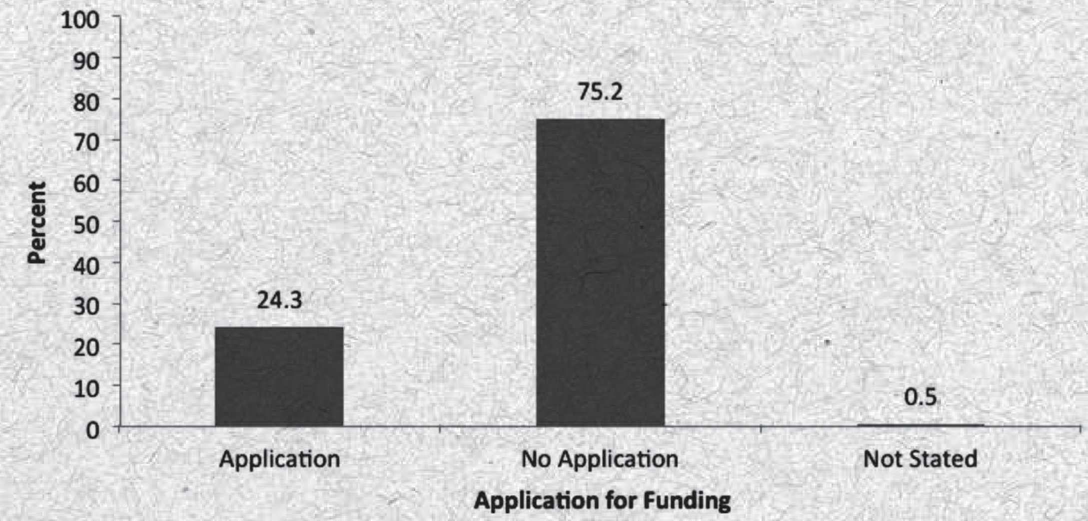
Estimate of Debts (USD)	Percent	Number
$500 - $999	4.4	1
$1 000- $4 999	17.4	4
$5 000 - $9 999	21.7	5
$10 000 - $14 999	13.0	3
$15 000 - $19 999	8.7	2
$20 000 - $49 999	17.4	4
Above $100 000	17.4	4
Total	**100**	**23**

5.2.6 FUNDING AND MARKETING

Application for Funding

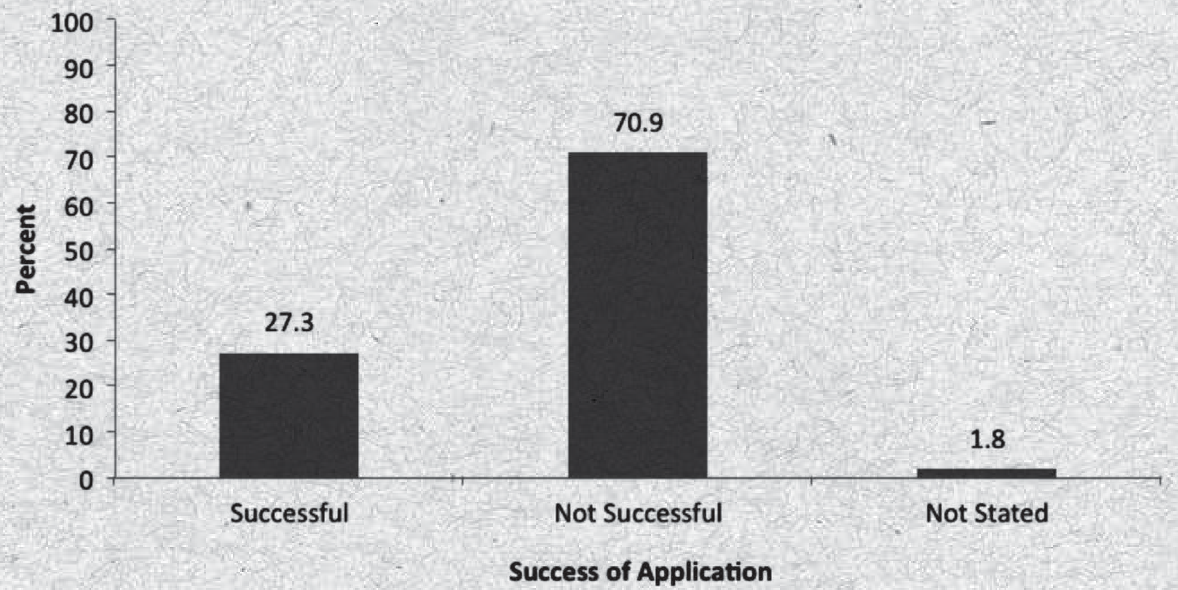
Over 75 percent of the individual artists in the Visual Arts and Crafts domain indicated that they had not applied for funding in the two years preceding the survey as shown in Figure 5.2.19 below.

Figure 5.2.19: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Application for Funding, CSS Zimbabwe, 2012



Individual artists who had applied for funding were asked about the success of their applications. About 71 percent of these individual artists indicated that they had not managed to secure funding as shown in Figure 5.2.20 below.

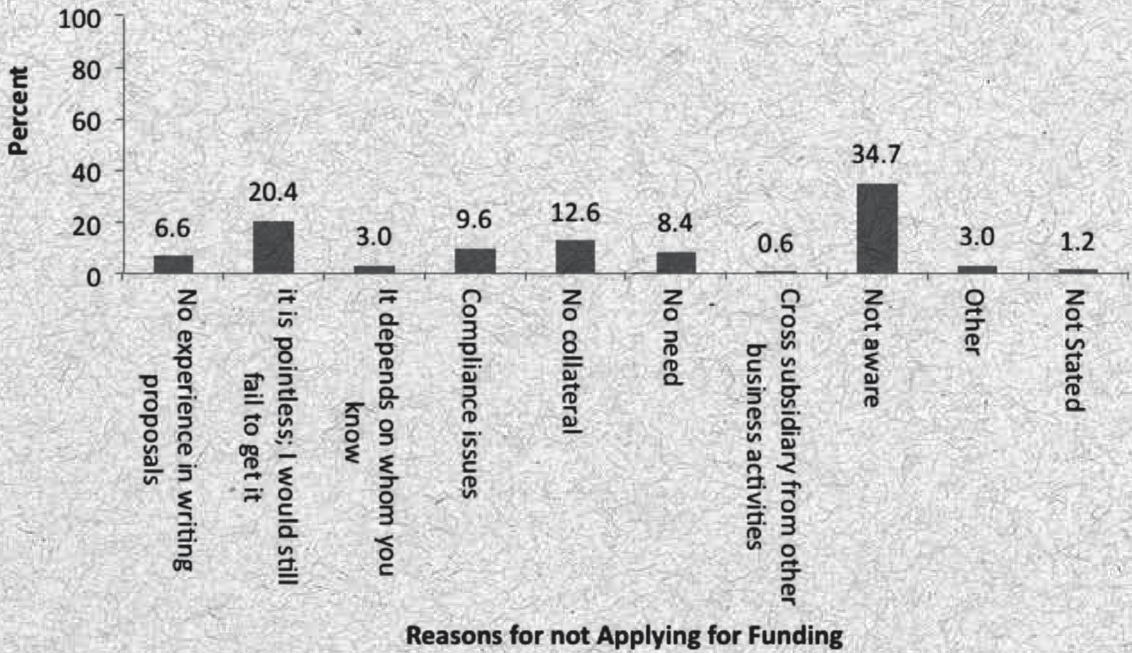
Figure 5.2.20: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Success of Application for Funding, CSS Zimbabwe, 2012



Main Reason for not Applying for Funding

All individual artists who indicated that they had not applied for funding over the two years preceding the survey were asked the major reason for not doing so. The percent distribution of the reasons given is shown in Figure 5.2.21 below. Thirty-five percent of the individual artists indicated that they were not aware of funding possibilities. Twenty percent cited the futility of the application while 13 percent had no collateral.

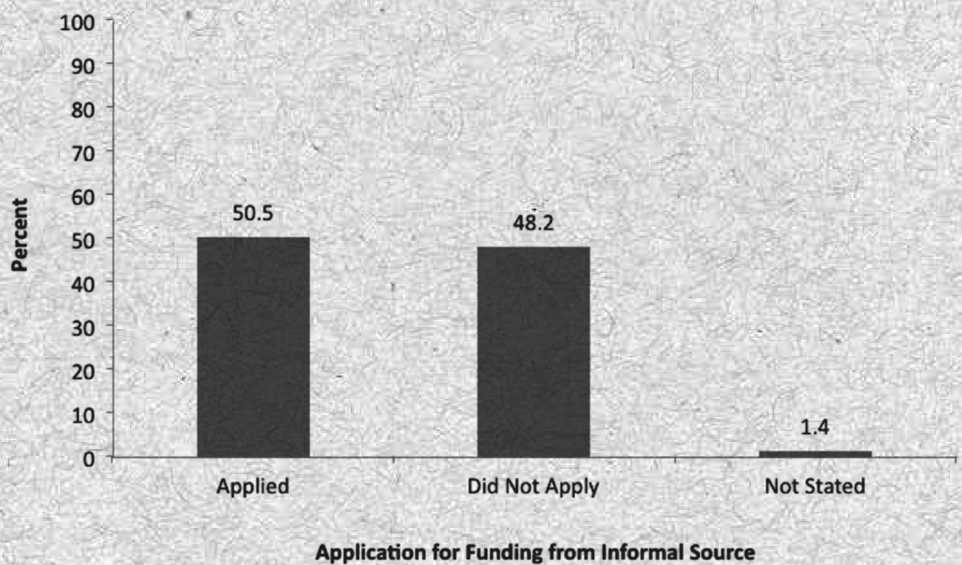
Figure 5.2.21: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Main Reason for not Applying for Funding, CSS Zimbabwe, 2012



Funding from Informal Sources

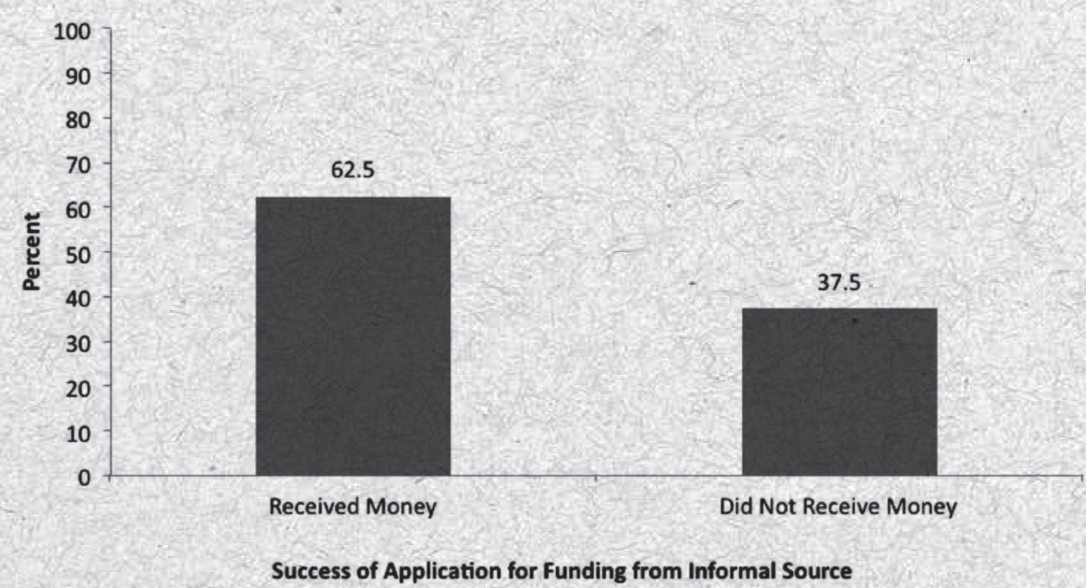
As shown in Figure 5.2.22 below, 51 percent of the individual artists in the Visual Arts and Crafts domain indicated that they had tried to get money from informal sources such as unregistered money lenders, friends or relatives.

Figure 5.2.22: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Application for Funding from Informal Sources, CSS Zimbabwe, 2012



Of the individual artists in the Visual Arts and Crafts domain who tried to get money from informal sources, about 63 percent indicated that they had received money whilst 37 percent were not successful as shown in Figure 5.2.23 below.

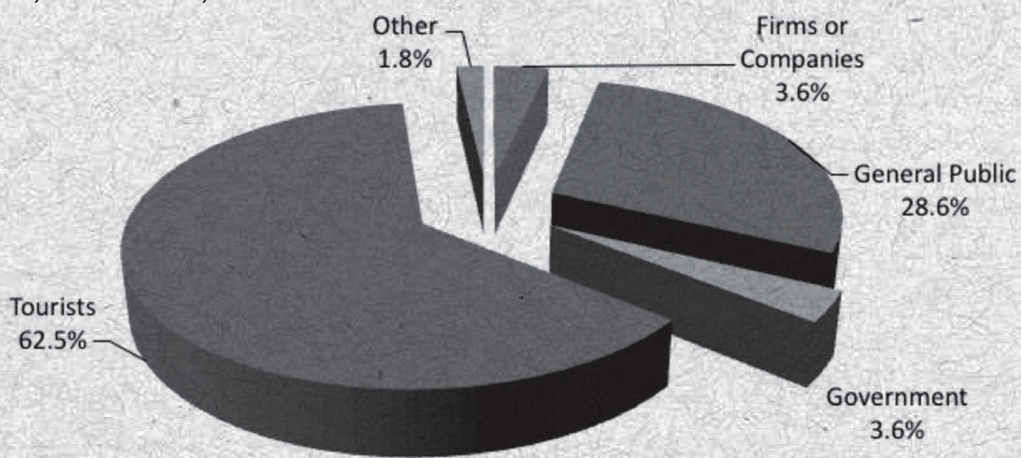
Figure 5.2.23: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Success of the Applications for Funding from Informal Sources, CSS Zimbabwe, 2012



Marketing

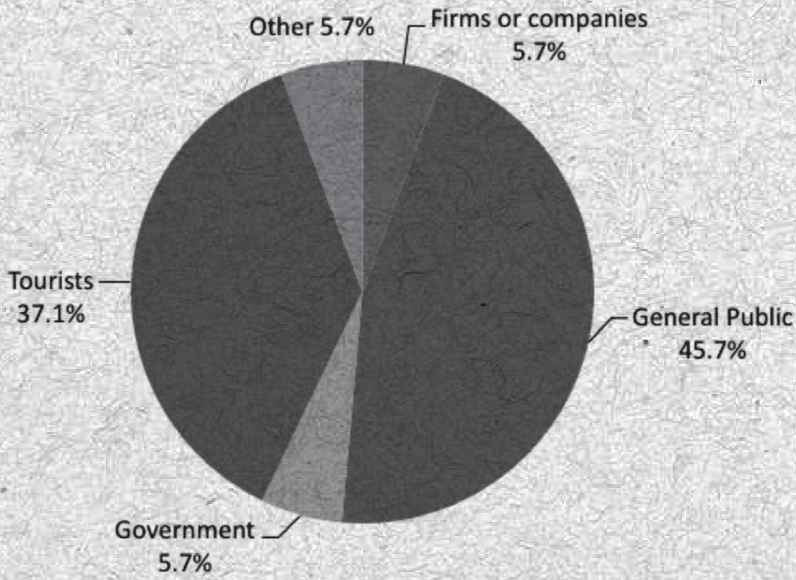
The main market for products of individual artists in the Visual Arts and Crafts domain were tourists (62.5 percent) and the general public (28.6 percent) as shown in Figure 5.2.24 below.

Figure 5.2.24: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Main Markets for Products, CSS Zimbabwe, 2012



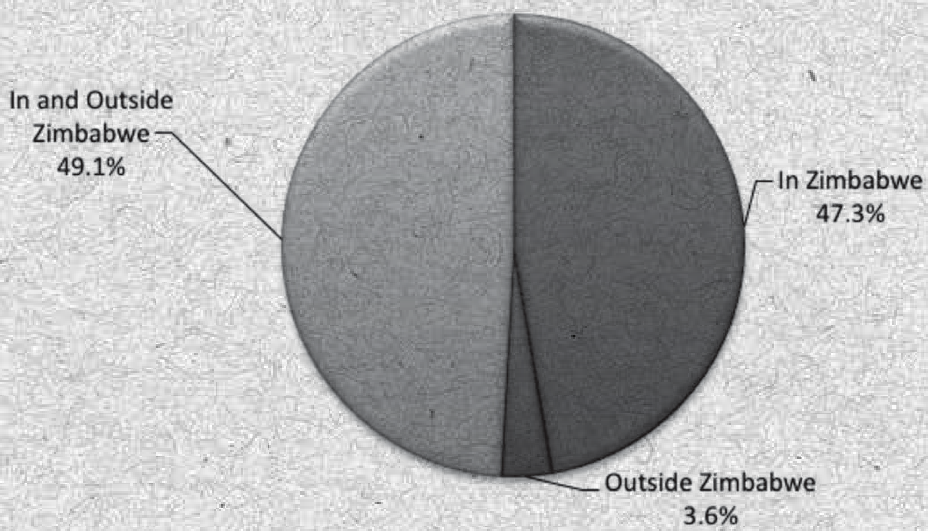
The main markets for institutions in the domain were the general public (45.7 percent) and tourists (37.1 percent). Almost six percent each of the institutions reported the Government, companies and other as their main market as shown in Figure 5.2.25 below.

Figure 5.2.25: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Main Markets for Products, CSS Zimbabwe, 2012



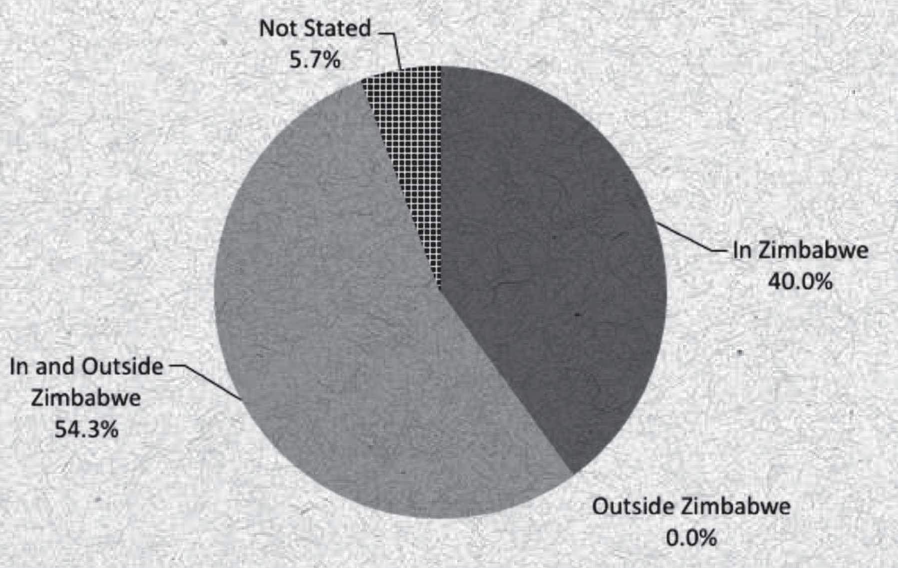
Almost half (49 percent) of the individual artists in the Visual Arts and Crafts domain indicated that they had sold their products both locally and abroad while 47 percent sold their products locally as shown in figure 5.2.26 below.

Figure 5.2.26: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Location of Markets, CSS Zimbabwe, 2012



From Figure 5.2.27, 54 percent of the institutions in the Visual Arts and Crafts domain reported selling products in and outside Zimbabwe, while 40 percent of institutions reported selling products locally.

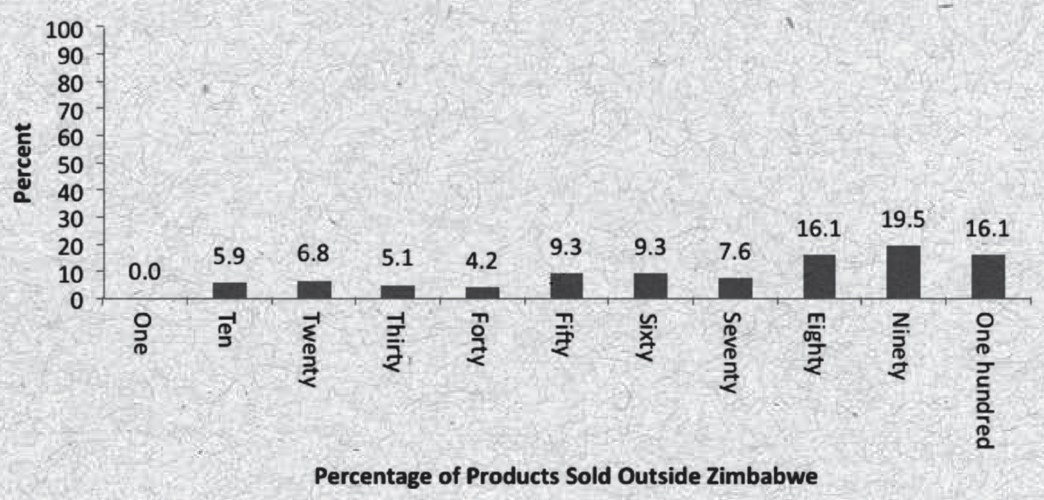
Figure 5.2.27: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Location of Markets, CSS Zimbabwe, 2012



External Markets

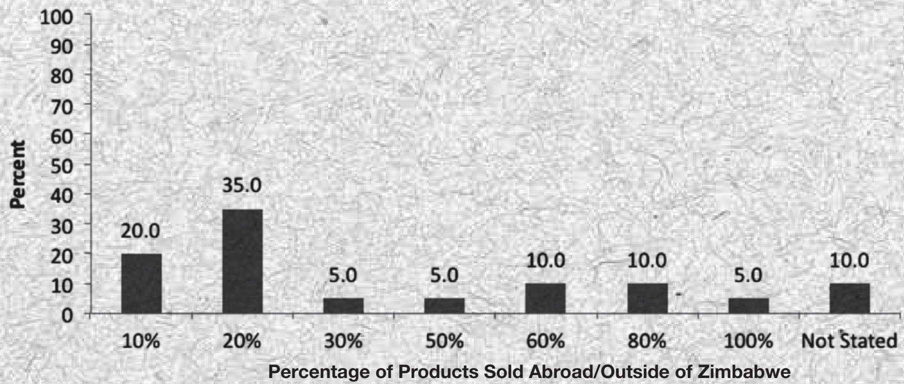
Individual artists who sold all or part of their products outside Zimbabwe were asked to specify the percentage of products sold outside the country. As shown in Figure 5.2.28 below, almost a fifth (19.5 percent) of these artists indicated ninety percent. Sixteen percent sold all their products outside the country and a similar percentage indicated eighty percent.

Figure 5.2.28: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



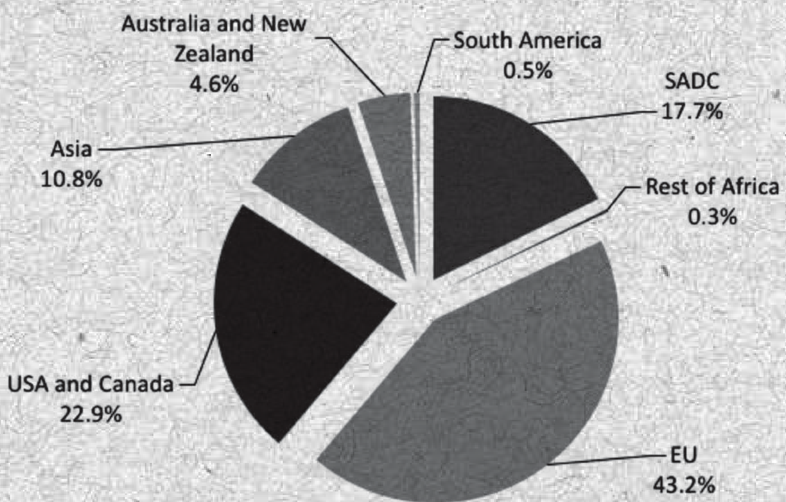
Among the institutions in the domain who sold products outside the country, 35 percent indicated that they sold twenty percent and 20 percent sold ten percent. The distribution of the institutions is shown in Figure 5.2.29 below.

Figure 5.2.29: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



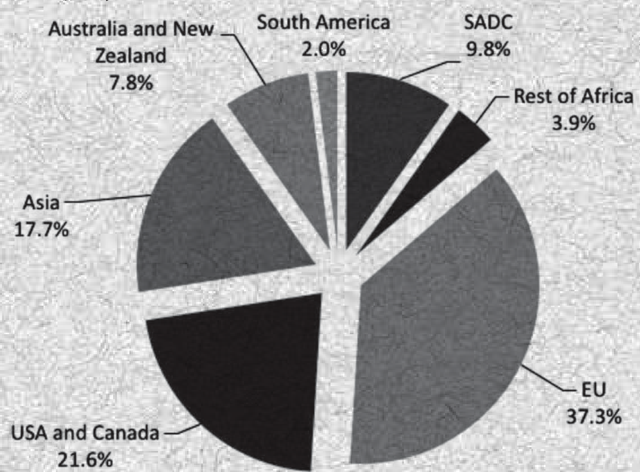
The breakdown of the external markets for individual artists in the Visual Arts and Crafts domain is presented in Figure 5.2.30 below. The external markets for the domain were mainly on the EU (43.2 percent), the USA and Canada (22.9 percent) and SADC (17.7 percent).

Figure 5.2.30: Percent Distribution of Individual Artists in the Visual Arts and Crafts Domain by External Markets of Products, CSS Zimbabwe, 2012



For institutions in Visual Arts and Crafts domain, the external markets for the domain were mainly on the EU (37.3 percent), the USA and Canada (21.6 percent) and Asia (17.7 percent) as shown in Figure 5.2.31 below.

Figure 5.2.31: Percent Distribution of Institutions in the Visual Arts and Crafts Domain by External Markets of Products, CSS Zimbabwe, 2012



LITERARY ARTS AND PUBLISHING (BOOKS AND PRESS)

5.3 LITERARY ARTS AND PUBLISHING (BOOKS AND PRESS)

5.3.1 INTRODUCTION

This domain represents publishing in all its various formats: Books, Newspapers, and Periodicals. This category includes the electronic or virtual forms of publishing such as online newspapers, e-books and the digital distribution of books and press materials. Libraries, both physical and virtual, are included in this domain as are Book fairs[7].

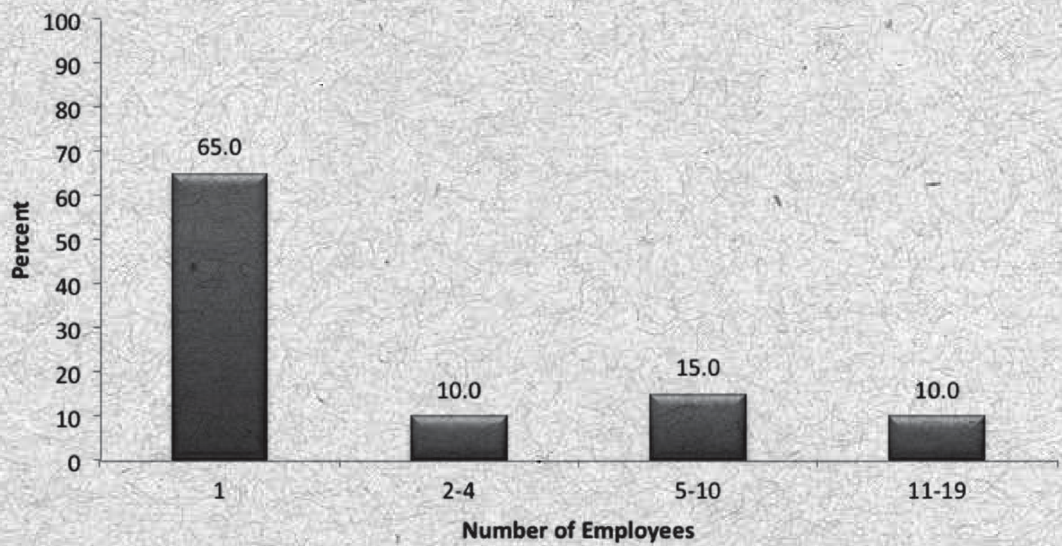
Printing activities related to the publishing industry were included within the Books and Press domain as a production function of publishing, while other printed matter, that is, the printing of business supply catalogues or 'quick' printing were excluded.

5.3.2 EMPLOYMENT

The survey asked questions on the number of employees, the nature and length of contracts, average income and membership of cultural associations.

The distribution of individual artists interviewed in the Literary Arts and Publishing domain by employment size is shown in Figure 5.3.1 below. Most of the artists (65.0 percent) in this domain work as individuals.

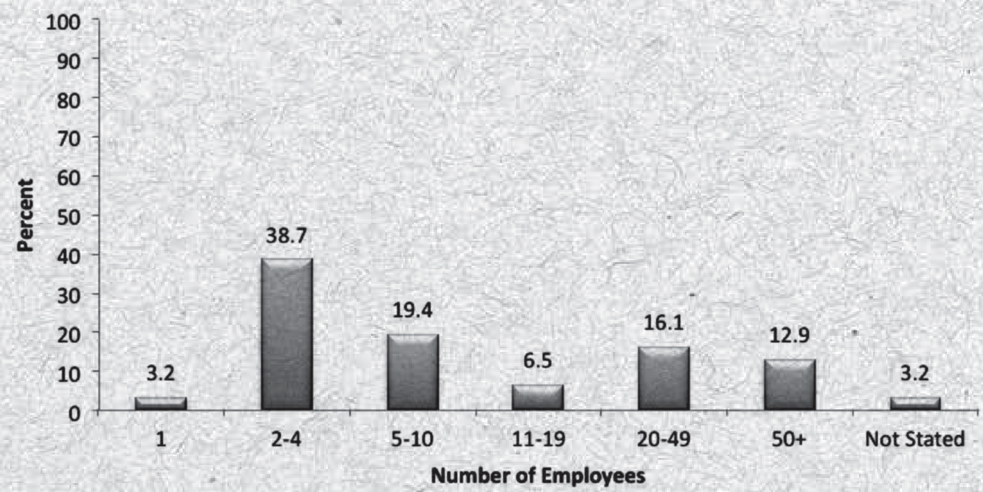
Figure 5.3.1: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Employment Size, CSS Zimbabwe, 2012



For institutions in the Literary Arts and Publishing domain, 39 percent had 2 to 4 employees and 19 percent had 5 to 10 employees as shown in Figure 5.3.2 below.

[7] *The 2009 UNESCO Framework for Cultural Statistics*

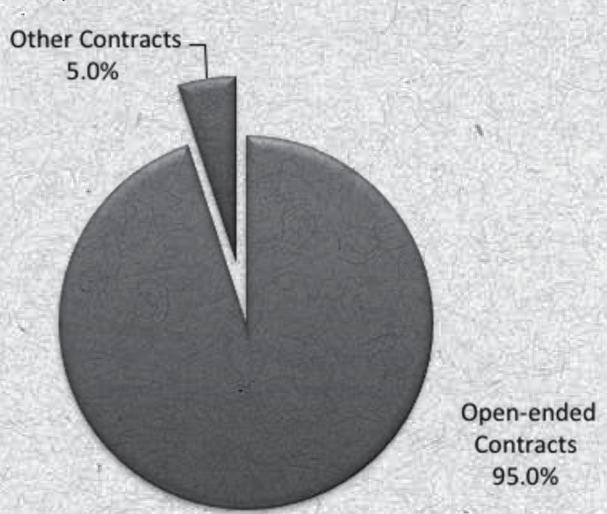
Figure 5.3.2: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Employment Size, CSS Zimbabwe, 2012



Average Lengths of Contracts

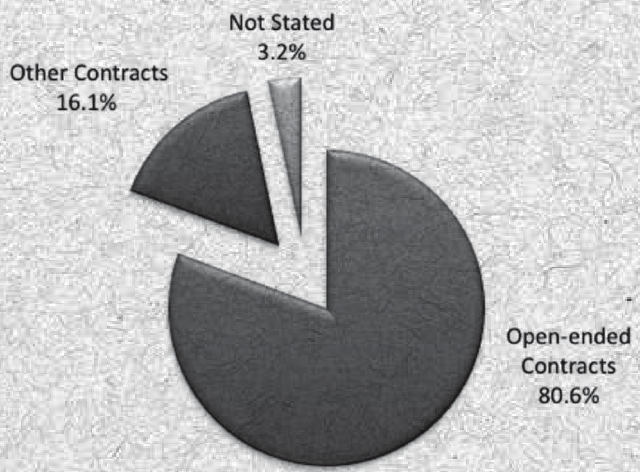
Ninety-five percent of individual artists in the Literary Arts and Publishing domain had employees with open-ended contracts while five percent had other types of contracts as presented in Figure 5.3.3 below.

Figure 5.3.3: Percent Distribution of Individual Artists in Literary Arts and Publishing Domain by Average Lengths of Employee Contracts, CSS Zimbabwe, 2012



Slightly above 80 percent of institutions interviewed from the Literary Arts and Publishing domain had employees with open-ended contracts while 16 percent had other types of contracts. See Figure 5.3.4 below.

Figure 5.3.4: Distribution of Institutions in the Literary Arts and Publishing Domain by Average Length of Employee Contracts, CSS Zimbabwe, 2012



5.3.3 EDUCATION AND TRAINING

Individual artists were asked about the education and training that the principal owners of the businesses had received. The information was on highest level of education completed, whether or not the owner received training for the job that they were doing, formality of training received and the areas of training.

Highest level of Education Attained by Principal Owners of Businesses

A quarter (25 percent) of the individual artists in the Literary Arts and Publishing domain had owners of businesses with a diploma after A Level, while slightly less than a quarter (23 percent) indicated that the owners had a university degree. The details are shown in Table 5.3.1.

Table 5.3.1: Highest Level of Education Attained by Principal Owners of Businesses in the Literary Arts and Publishing Domain, CSS Zimbabwe, 2012

Highest Level of Education	Percent	Number
Secondary (1 to 4)	7.5	3
‘A” Level (5 to 6)	2.5	1
Certificate after Secondary ('O' Level)	10.0	4
Certificate after 'A' Level	10.0	4
Diploma after Secondary ('O' Level)	2.5	1
Diploma after 'A' Level	25.0	10
University Degree	22.5	9
Post Graduate Degree	20.0	8
Total	**100**	**40**

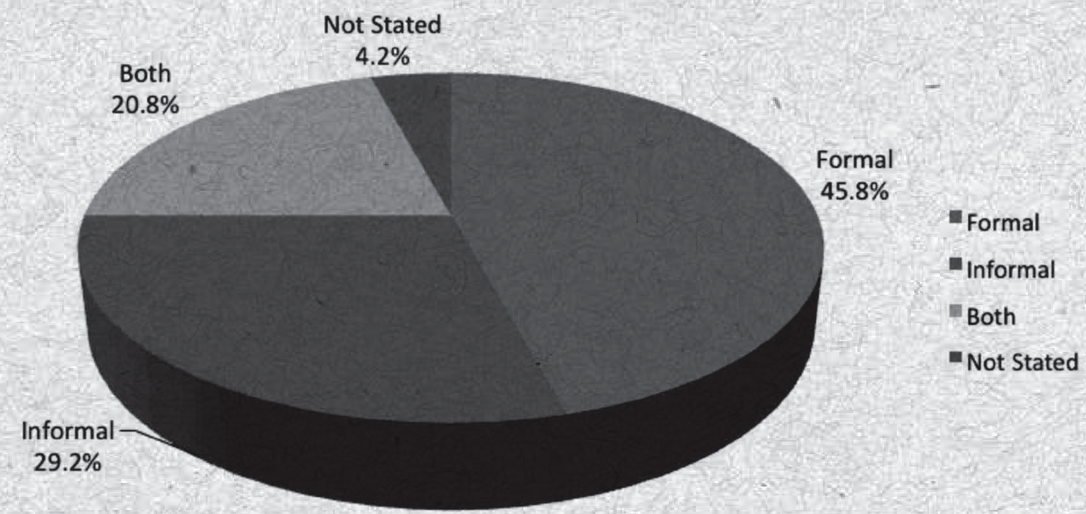
Training

As shown in Figure 5.3.5 below, 60 percent of the individual artists in the Literary Arts and Publishing domain reported that the owners of the businesses had received some training.

Figure 5.3.5: Percent Distribution of Principal Owners of Businesses in the Literary Arts and Publishing Domain by Training Received, CSS Zimbabwe, 2012

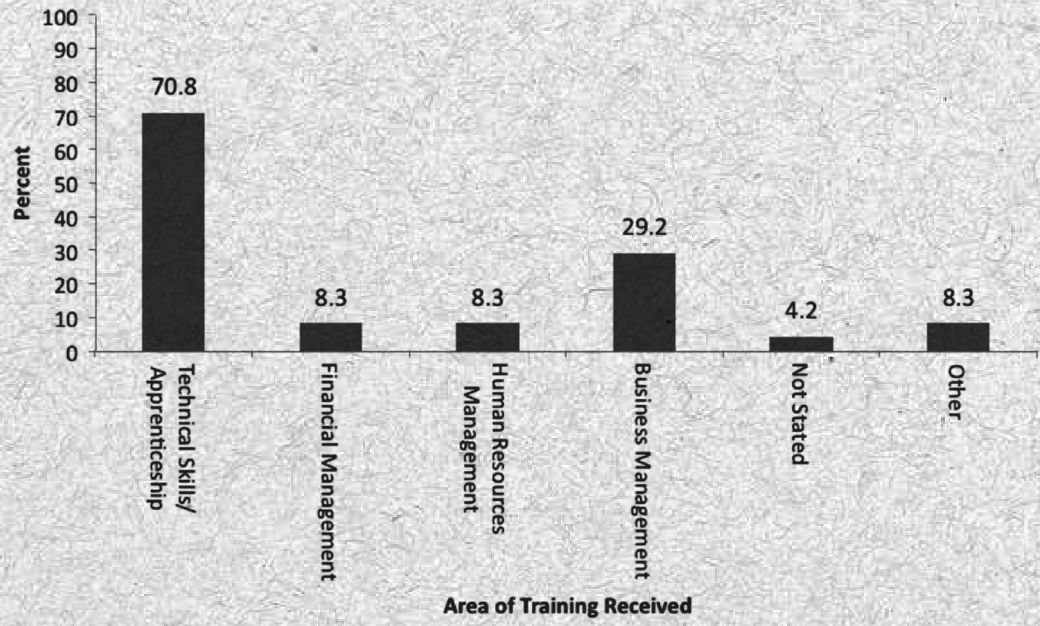
For those that received training, about 46 percent of the business owners received formally training. Twenty- nine percent of the owners indicated that they received informal training whilst 21 percent had formal and informal training as shown in Figure 5.3.6 below.

Figure 5.3.6: Percent Distribution of Principal Owners of Businesses in the Literary Arts and Publishing Domain by Type of Training Received, CSS Zimbabwe, 2012



Out of the 24 owners of businesses in this domain, about 71 percent indicated that they had received technical skills training while 29 percent had also received business management skills as shown in Figure 5.3.7 below.

Figure 5.3.7: Percent Distribution of Principal Owners of Businesses in Literary Arts and Publishing Domain by Area of Training Received, CSS Zimbabwe, 2012



5.3.4 INCOME AND EXPENDITURE

Income in 2011

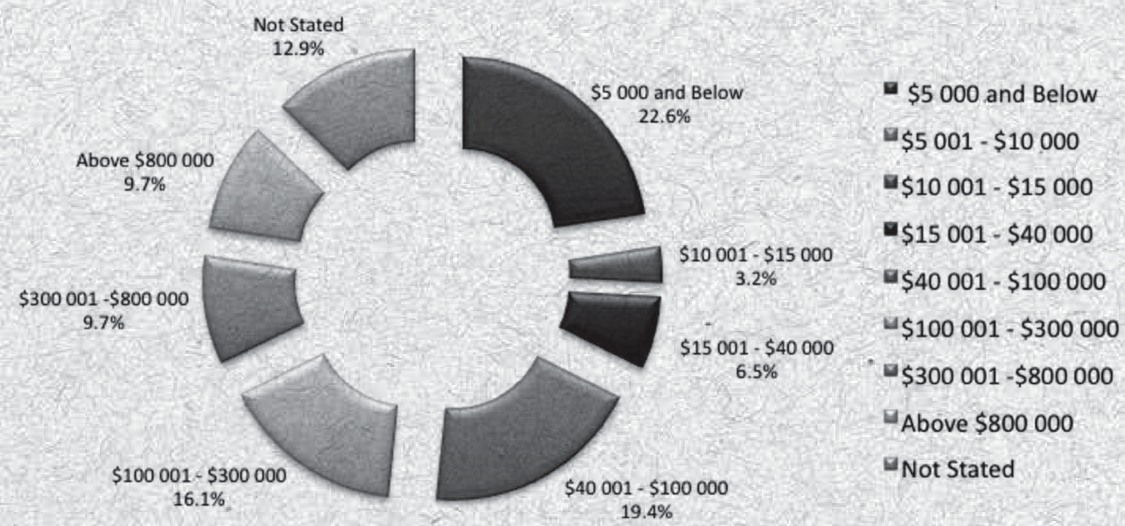
For the individual artists in the Literary Arts and Publishing domain, the predominant average monthly income was found to be less than US$100 (40 percent). About 18 percent of the individual artists earned between US$251 to US$500 a month on average as shown in Table 5.3.2 below.

Table 5.3.2: Percent Distribution of Individual Artists in Literary Arts and Publishing Domain by Average Monthly Income in the Year 2011, CSS Zimbabwe, 2012

Income (USD)	Percent	Number
Less $100	40	16
$100 - $250	15	6
$251 - $500	17.5	7
$501 - $750	2.5	1
$751 - $1 000	2.5	1
$1 001 - $2 000	7.5	3
$2 001 - $3 000	5	2
$3 000 and Above	2.5	1
Not Stated	7.5	3
Total	**100**	**40**

About 23 percent of the institutions in this domain had annual earnings of US$5 000 and below whilst 13 percent was above US$800 000. Nineteen percent had annual earnings of between US$40 001 and US$100 000. See Figure 5.3.8 below.

Figure 5.3.8: Percent Distribution of Institutions in Literary Arts and Publishing Domain by Annual Income for the Year 2011, CSS Zimbabwe, 2012



Expenditure in 2011

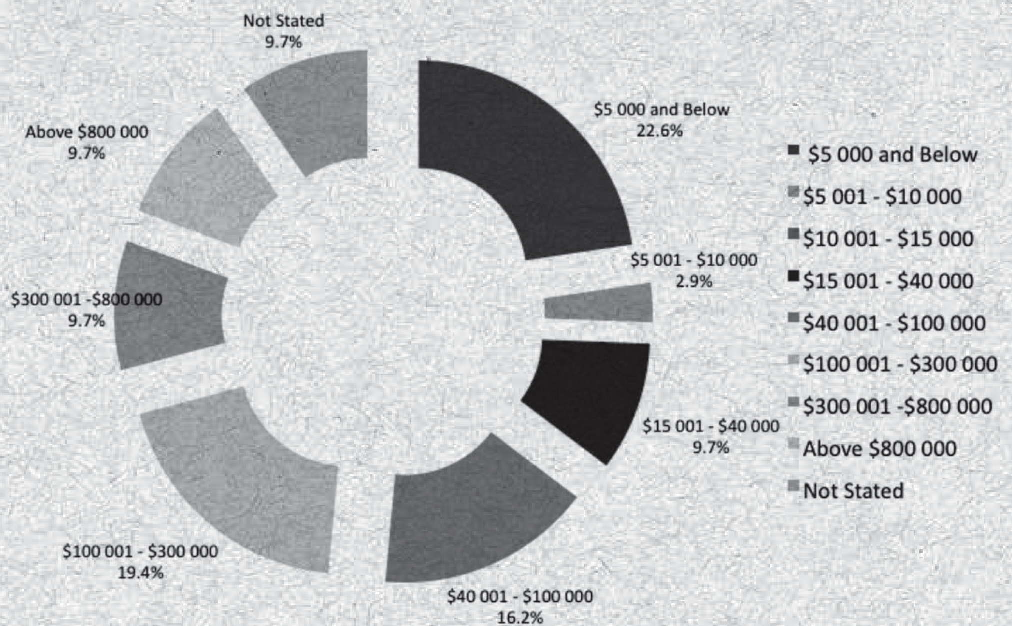
Eighty- three percent of the individual artists in the Literary Arts and Publishing domain reported that their average monthly expenditure in the year 2011 were less than US$1 000. See Table 5.3.3 below.

Table 5.3.3: Percent Distribution of Individual Artists in Literary Arts and Publishing Domain by Average Monthly Expenditure in the Year 2011, CSS Zimbabwe, 2012

Expenditure (USD)	Percent	Number
Less than $1 000	82.5	33
$1 000 - $5 000	5	2
Not Stated	12.5	5
Total	100	40

Twenty-three percent of institutions in the domain had an annual expenditure of US$5 000 and below whilst 10 percent was more than US$800 000. Nineteen percent had an expenditure of between US$100 001 and US$300 000 as shown in Figure 5.3.9 below.

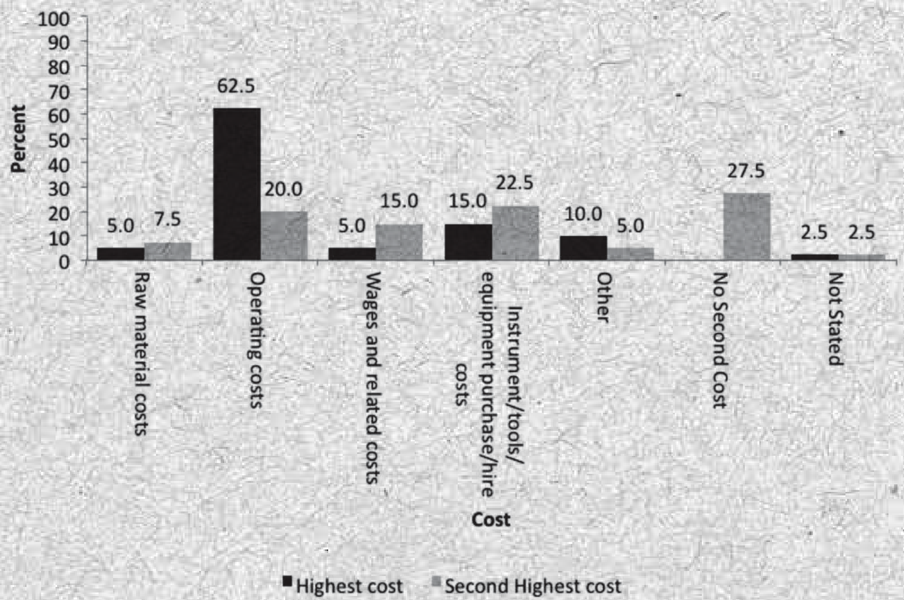
Figure 5.3.9: Percent Distribution of Institutions in Literary Arts and Publishing Domain by Annual Expenditure for the Year 2011, CSS Zimbabwe, 2012



Highest and Second Highest Cost

Individual artists were asked what they spent most of their money on in their businesses. About 63 percent of the individual artists in the domain identified operating costs as the highest cost while 15 percent cited instrument, tools and equipment hire. Instrument, tools and equipment hire was cited by 23 percent as the second highest cost. See Figure 5.3.10 below.

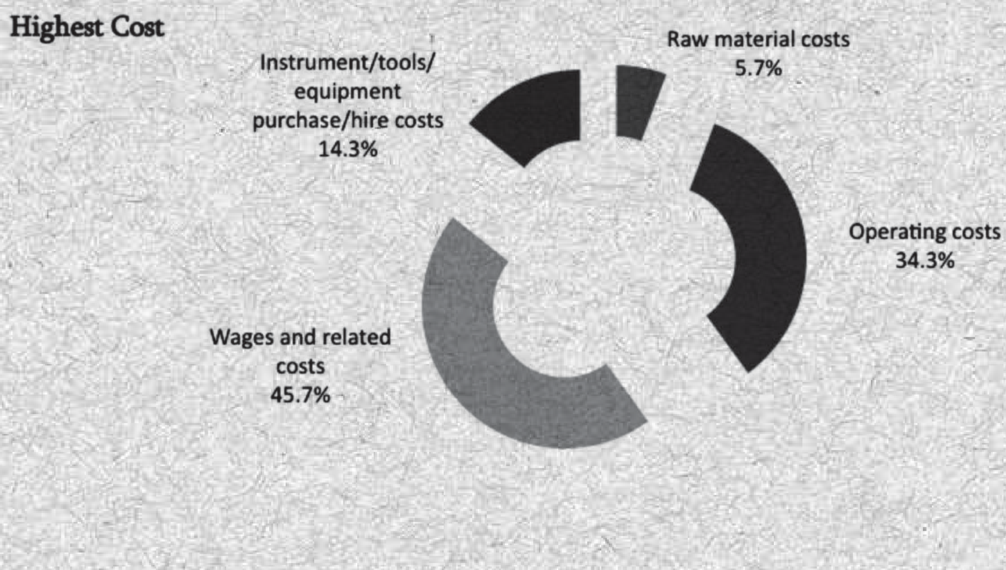
Figure 5.3.10: Percent Distribution of Individual Artists in Literary Arts and Publishing Domain by Cost, CSS Zimbabwe, 2012

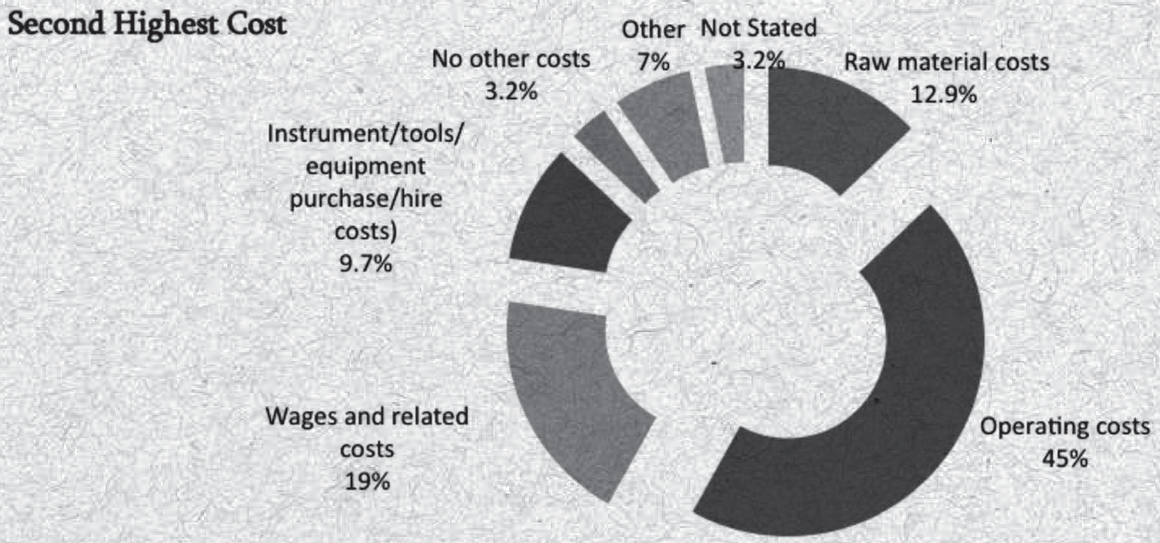


Institutions were asked what they spent most of their money on in their businesses. Forty-six percent of the institutions in this domain reported wages and related costs as the highest cost. Operating costs were reported by 34 percent of the institutions while 14 percent reported instruments hire or purchase as the highest cost.

The second highest expenditure cost in the Literary Arts and Publishing domain was operating cost as reported by 45 percent of the institutions. Wages and related expenses were cited as the second highest by 19 percent of the institutions. See Figure 5.3.11 below.

Figure 5.3.11: Percent Distribution of Institutions in Literary Arts and Publishing Domain by Cost, CSS Zimbabwe, 2012





Main Source of Income in 2011

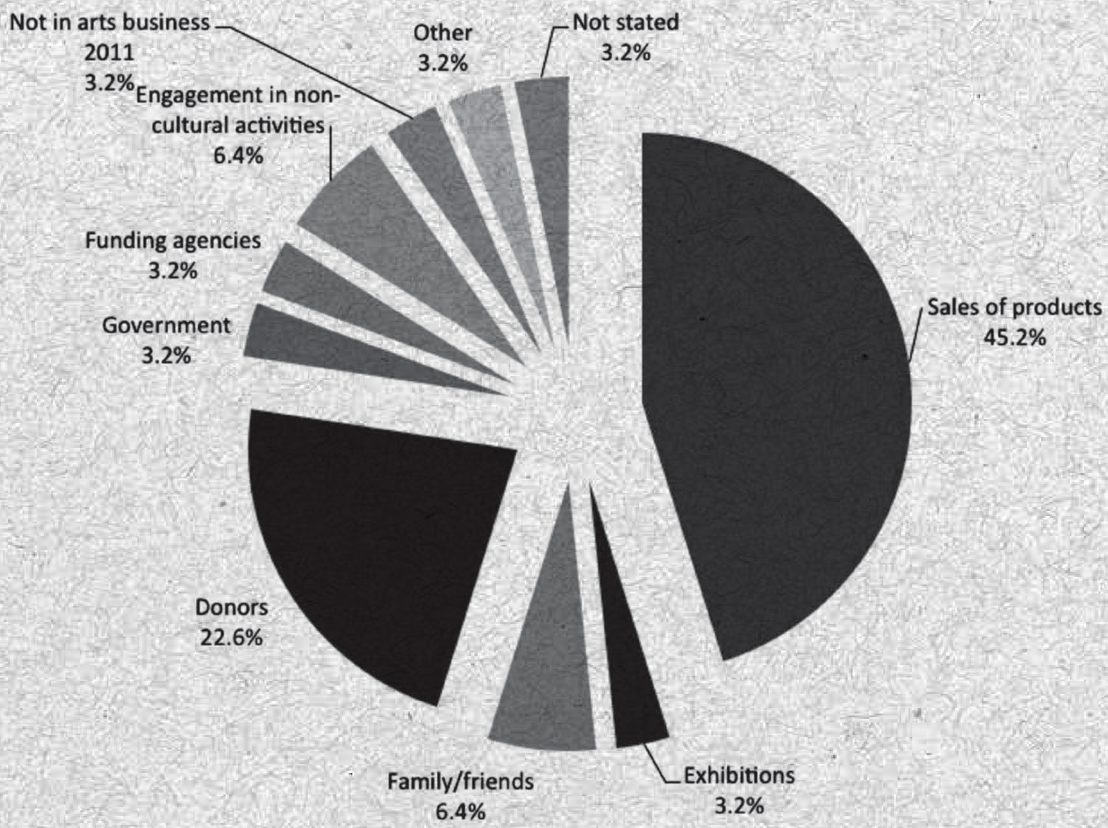
Thirty percent of individual artists in the Literary Arts and Publishing domain received most of their income from paid employment in non-cultural activities. Exhibitions such as Fairs were the main source of income for about 28 percent of the individual artists while 13 percent reported direct sales of products. See Table 5.3.4 below.

Table 5.3.4: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Main Source of Income, CSS Zimbabwe, 2012

Source of Income	Percent	Number
Sales of products	12.5	5
Exhibitions	27.5	11
Royalties	2.5	1
Family/friends	5	2
Government	2.5	1
Funding agency grant	2.5	1
Paid employment in non-cultural activities	30	12
Not in arts business in 2011	10	4
Other	7.5	3
Total	**100**	**40**

In the Literary Arts and Publishing domain, 45 percent of the institutions cited sales of products as the main source of income while 23 percent indicated donors. Overall, the domain's incomes were dominated by sales and donors. See Figure 5.3.12 below.

Figure 5.3.12; Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Main Source of Income in the Year 2011, CSS Zimbabwe, 2012



Secondary Source of Income in 2011

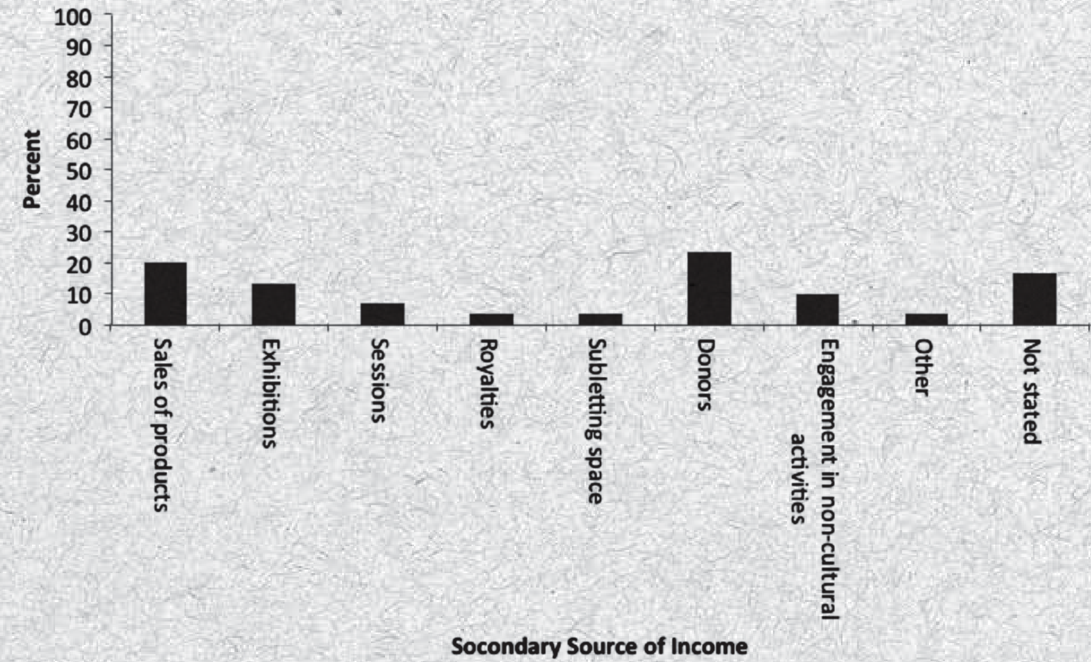
The sale of products was reported by about 17 percent of the individual artists in the Literary Arts and Publishing domain as the secondary source of income. Royalties were cited by 14 percent of the artists as the secondary source while about 11 percent reported paid-employment outside of the cultural industry as shown in Table 5.3.5 below.

Table 5.3.5: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Secondary Source of Income, CSS Zimbabwe, 2012

Source of Income	Percent	Number
Sales of products	16.7	6
Exhibitions	5.6	2
Royalties	13.9	5
Family/friends	2.8	1
Government	2.8	1
Funding agency grant	5.6	2
Paid employment in non-cultural activities	11.1	4
No second source	36.1	13
Other	5.6	2
Total	**100**	**36**

For institutions in this domain, 23 percent reported donors as the highest secondary source of income while 20 percent cited direct sales of products as shown in Figure 5.3.13 below.

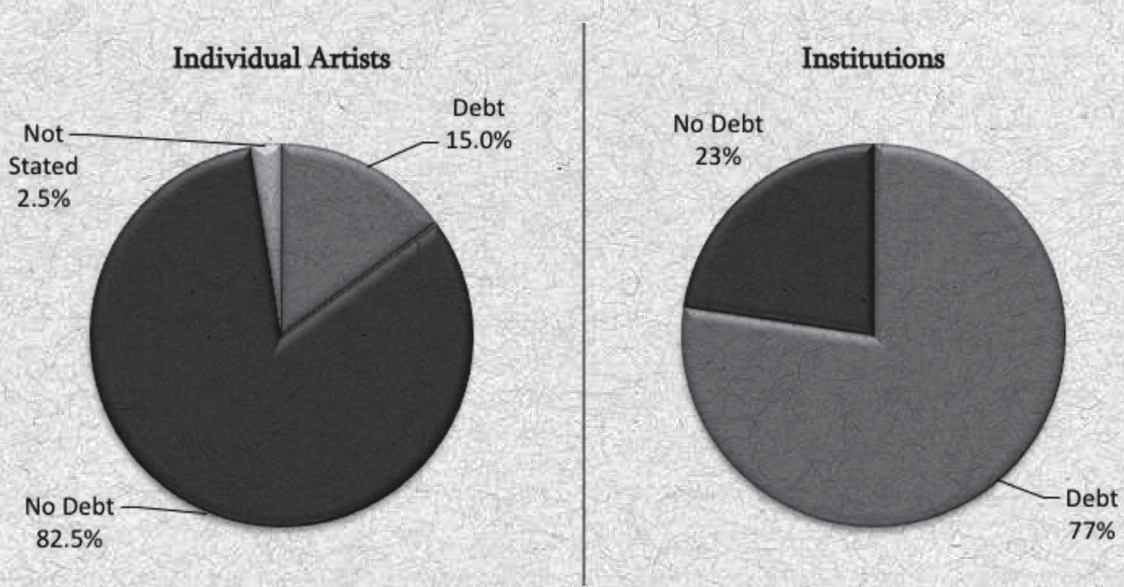
Figure 5.3.13: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Secondary Source of Income, CSS Zimbabwe, 2012



5.3.5 DEBTS/LIABILITIES

Fifteen percent of the individual artists and 77 percent of the institutions in the Literary Arts and Publishing domain indicated that they had incurred debts as shown in Figure 5.3.14 below.

Figure 5.3.14: Percent Distribution of Individual Artists and Institutions in the Literary Arts and Publishing Domain by Debts, CSS Zimbabwe, 2012



As shown in Table 5.3.6 below, 50 percent of the individual artists who had debts indicated that their debts ranged between US$2 000 and US$4 999. Thirty-three percent had debts ranging between US$500 and US$999.

Table 5.3.6: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Estimate of Debt or Liabilities of the Businesses, CSS Zimbabwe, 2012

Estimate of Debts (USD)	Percent	Number
$200- $499	16.7	1
$500 - $999	33.3	2
$2 000- $4 999	50.0	3
Total	**100.0**	**6**

As shown in Table 5.3.7 below, a quarter (25.0 percent) of the institutions which had incurred debts indicated that their debts ranged between US$1 000 and US$4 999. About 17 percent each indicated that their debts ranged between US$50 000 and US$99 999 and over US$100 000.

Table 5.3.7: Percent Distribution of Indebted Institutions in the Literary Arts and Publishing Domain by Estimate of Debts or Liabilities of the Businesses, CSS Zimbabwe, 2012

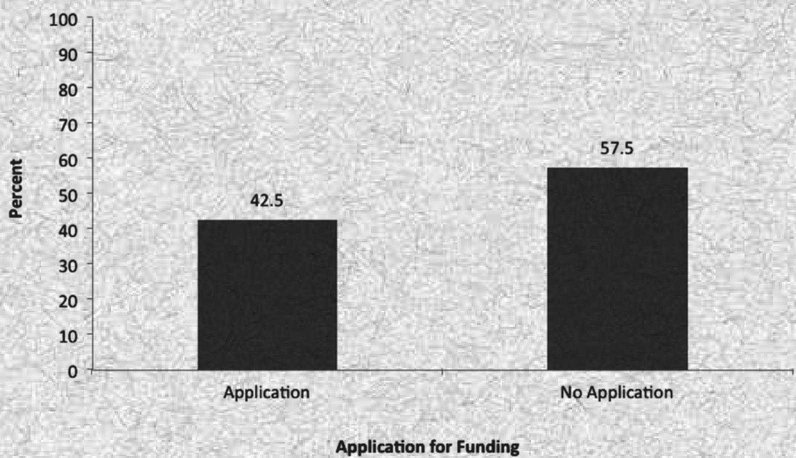
Estimate of Debts (USD)	Percent	Number
$1 000- $4 999	25.0	6
$5 000 - $9 999	12.5	3
$10 000 - $14 999	4.2	1
$15 000 - $19 999	12.5	3
$20 000 - $49 999	8.3	2
$50 000- $99 999	16.7	4
Above $100 000	16.7	4
Not Stated	4.2	1
Total	**100**	**24**

5.3.6 FUNDING AND MARKETING

Application for Funding

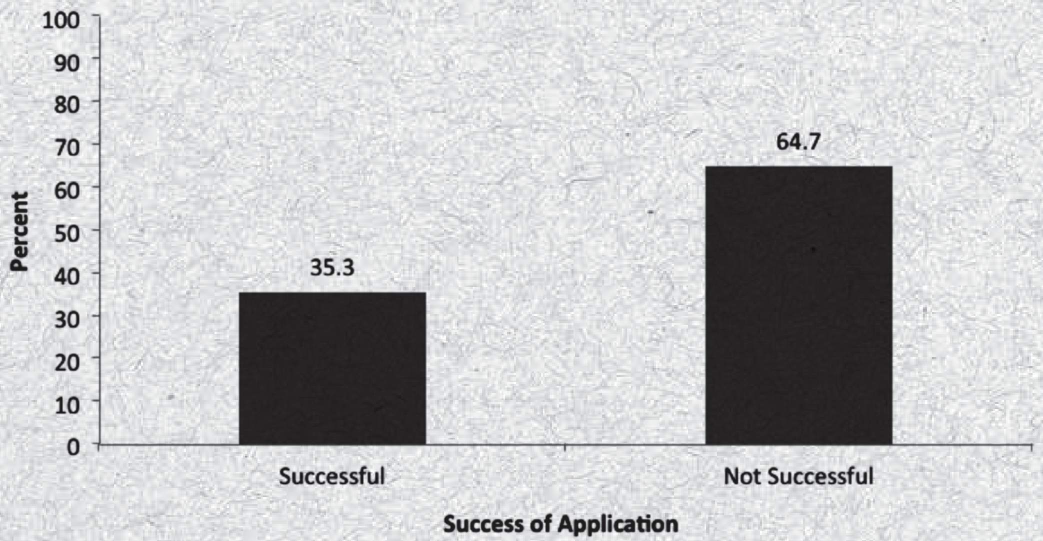
In the Literary Arts and Publishing domain, about 43 percent of the individual artists indicated that they had applied for funding in the two years preceding the survey as shown in Figure 5.3.15.

Figure 5.3.15: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Application for Funding, CSS Zimbabwe, 2012



About 35 percent of the individual artists in this domain who had applied for funding indicated that they managed to secure it as shown in Figure 5.3.16 below.

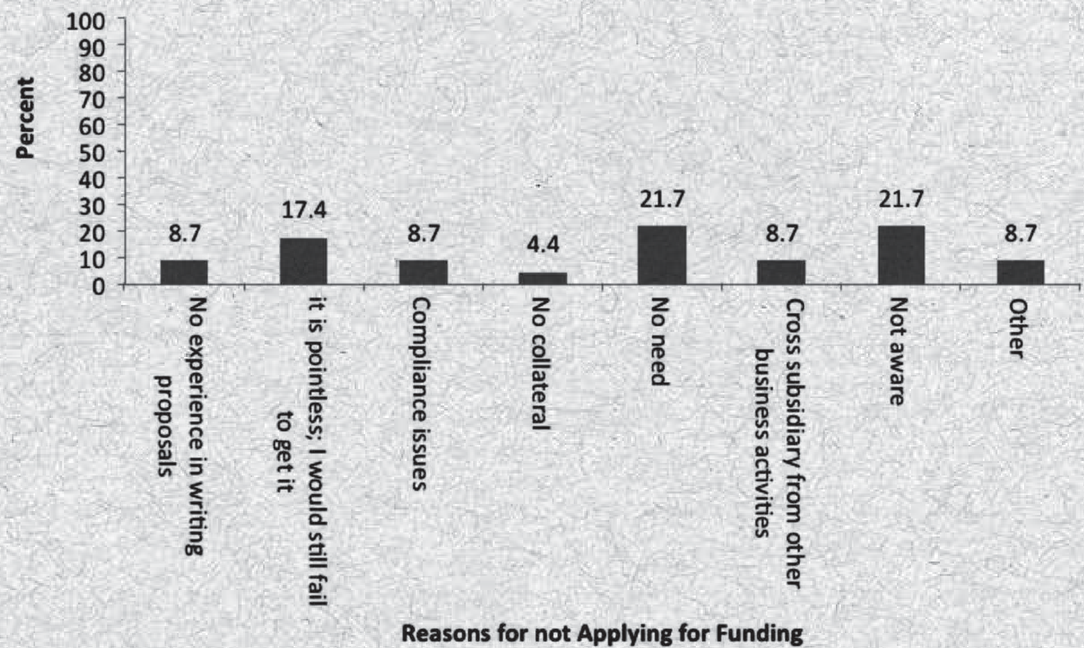
Figure 5.3.16: Distribution of Individual Artists in the Literary Arts and Publishing Domain by Success of Application for Funding, CSS Zimbabwe, 2012



Main Reason for not Applying for Funding

All individual artists who indicated that they had not applied for funding over the two years preceding the survey were asked the major reason for not having done so. In the Literary Arts and Publishing domain, 22 percent apiece indicated that they were “Not aware” and that there was “No need” while 17 percent cited futility of the applications. See Figure 5.2.17 below.

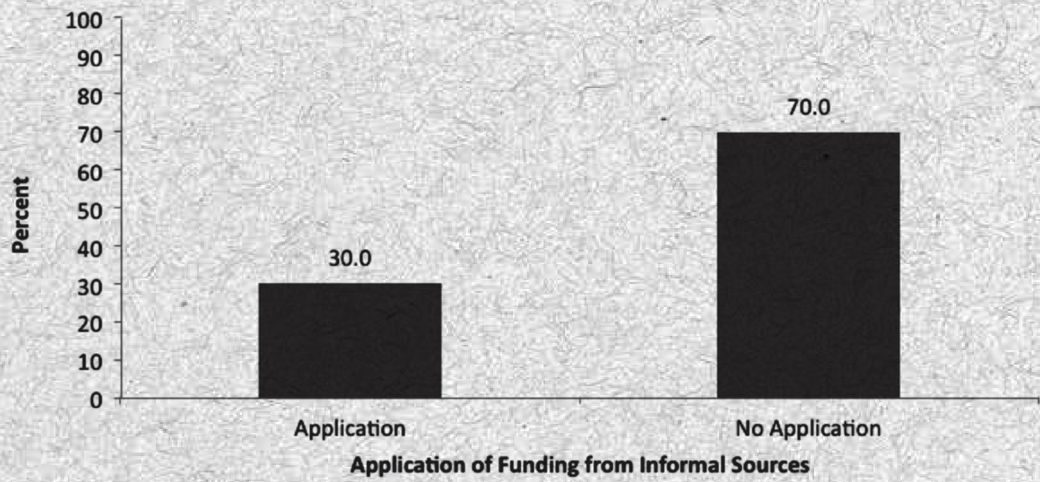
Figure 5.3.17: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Main Reason for not Applying for Funding, CSS Zimbabwe, 2012



Funding from Informal Sources

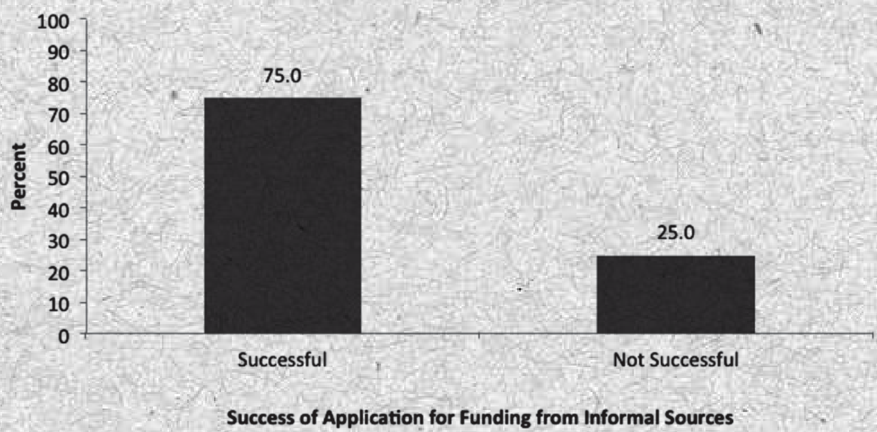
In relation to securing funding from informal sources, 30 percent of the individual artists indicated that they had approached informal sources such as unregistered money lenders, friends or relatives for capital as shown in Figure 5.3.18 below.

Figure 5.3.18: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Application of Funding from Informal Sources, CSS Zimbabwe, 2012



Three quarters (75 percent) of the individual artists in the Literary Arts and Publishing domain who applied for money from informal sources were successful as shown in Figure 5.3.19 below.

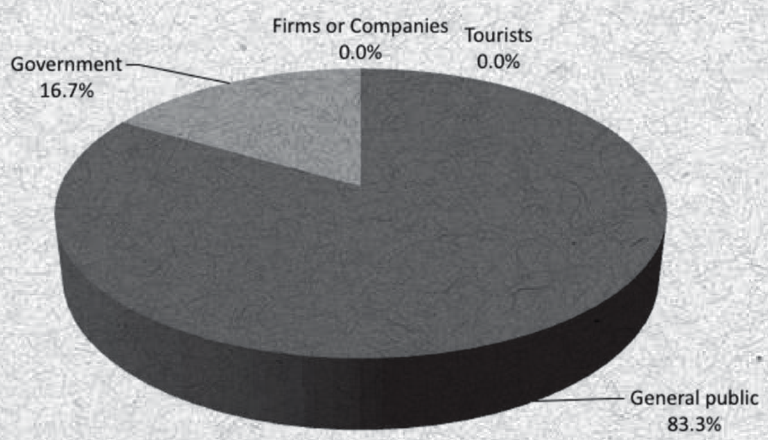
Figure 5.3.19: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Success of Application for Funding from Informal Sources, CSS Zimbabwe, 2012



Marketing

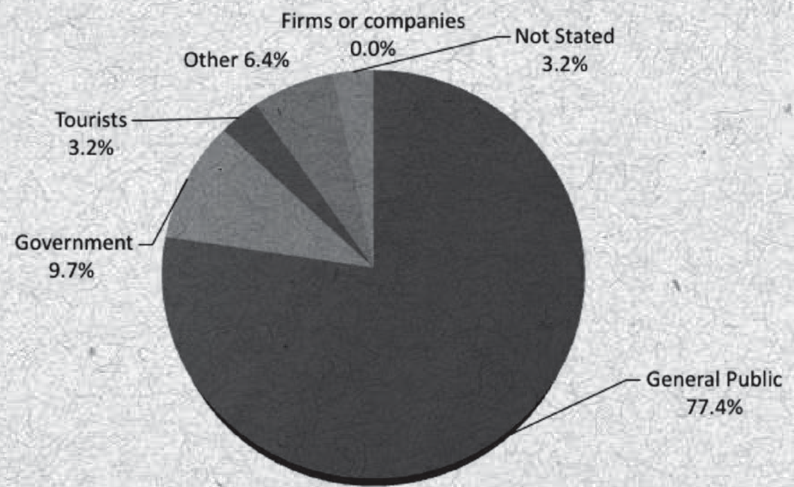
The main markets for individual artists in the Literary Arts and Publishing domain were the general public (83.3 percent) and Government (16.7 percent) as shown in Figure 5.3.20 below.

Figure 5.3.20: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Main Market for Products, CSS Zimbabwe, 2012



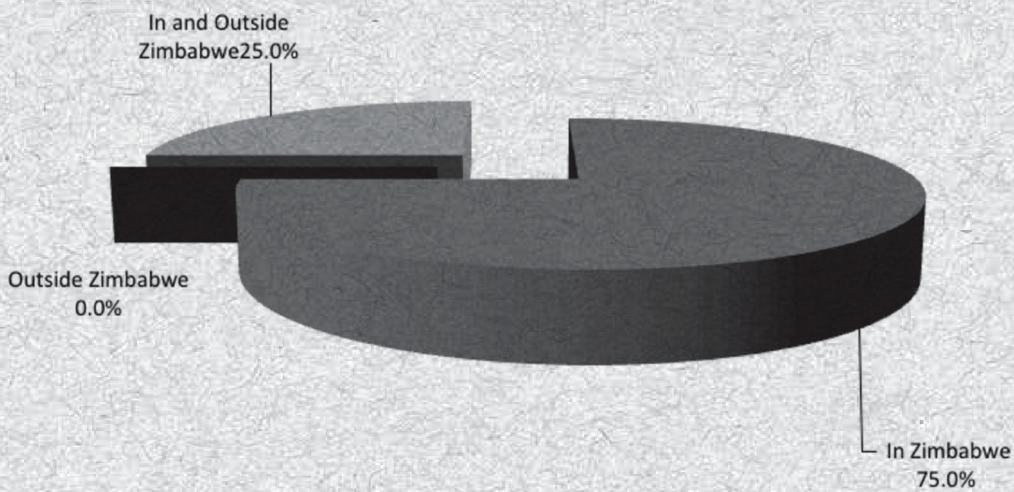
As shown in Figure 5.3.21, the main markets for institutions in this domain were also the general public (77.4 percent) and government (9.7 percent).

Figure 5.3.21: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Main Markets for Products, CSS Zimbabwe, 2012



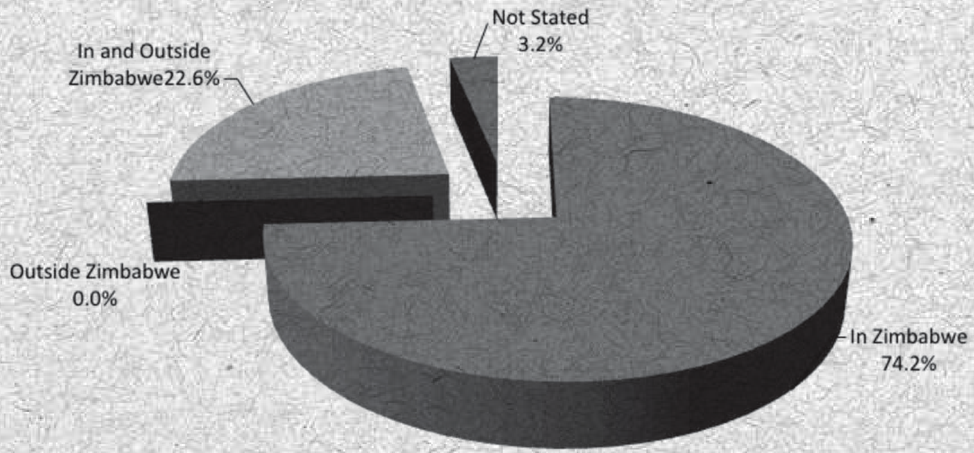
The predominant market for the individual artists in the Literary Arts and Publishing was the local market (75 percent). Twenty-five percent of the artists in the domain indicated that they had sold their products in and outside Zimbabwe. See Figure 5.3.22 below.

Figure 5.3.22: Distribution of Individual Artists in the Literary Arts and Publishing Domain by Location of Markets, CSS Zimbabwe, 2012



Seventy-four percent of the institutions in the Literary Arts and Publishing domain reported that they sold their products exclusively in Zimbabwe. Twenty-three percent of the institutions in this domain indicated that they had sold their products in and outside Zimbabwe See Figure 5.3.23 below.

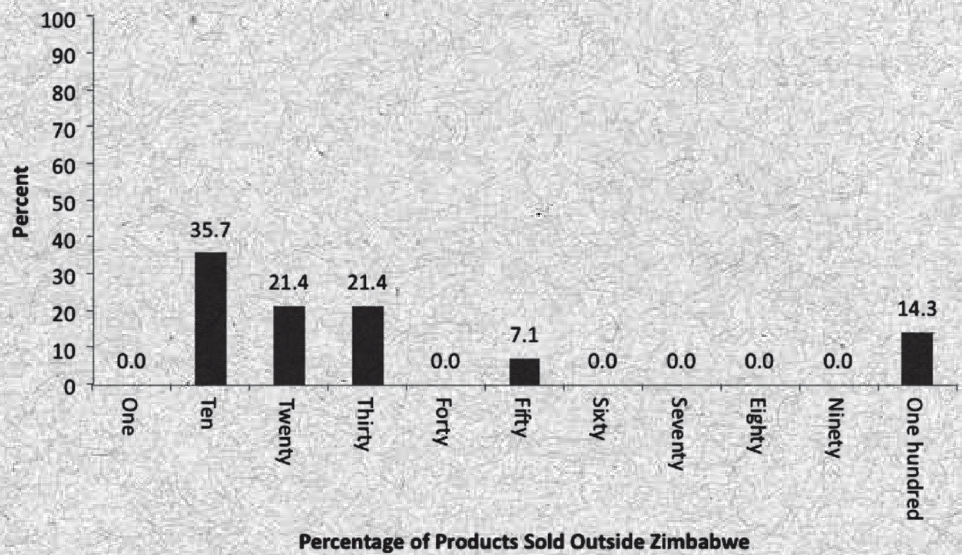
Figure 5.3.23: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Location of Markets, CSS Zimbabwe, 2012



External Markets

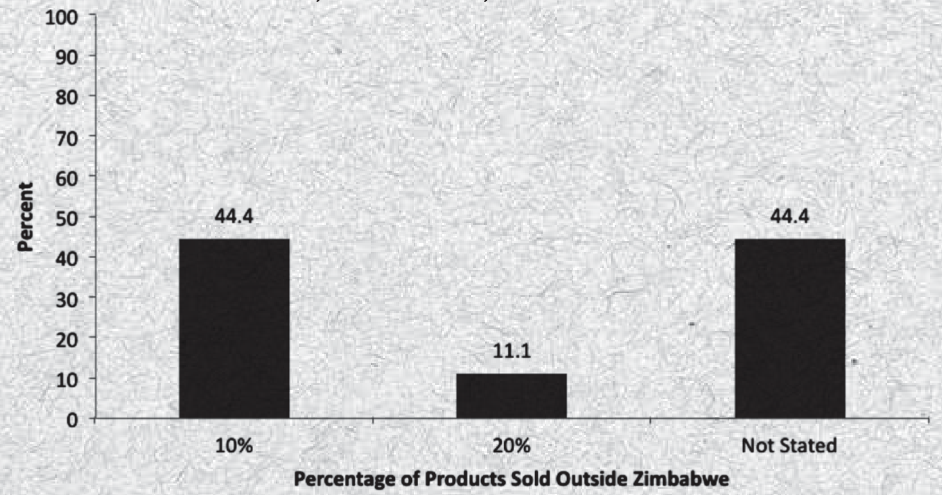
Among the individual artists in the Literary Arts and Publishing domain, almost 36 percent indicated that they had sold ten percent of their products outside Zimbabwe. Twenty-one percent of the artists had sold twenty percent and another 21 percent of individual artists also indicated that they had sold thirty percent of their products outside the country. Fourteen percent of the artists had sold all their products outside Zimbabwe. See Figure 5.3.24 below.

Figure 5.3.24: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by Percentage of Products Sold outside Zimbabwe, CSS Zimbabwe, 2012



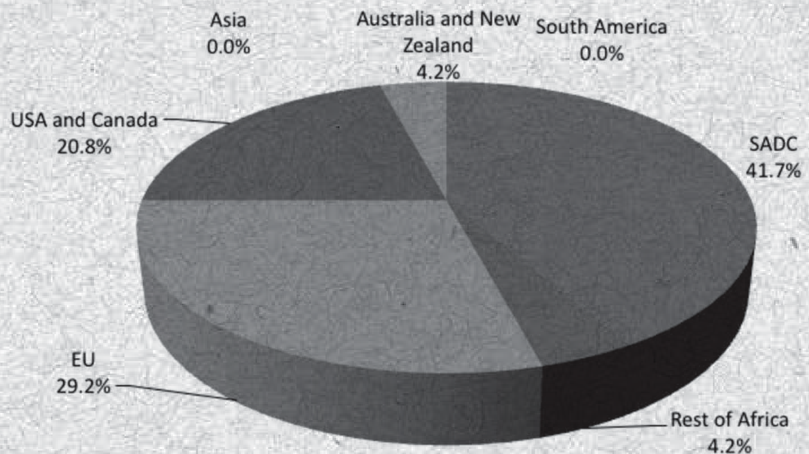
The distribution of institutions in the Literary Arts and Publishing domain by percentage of products sold outside Zimbabwe is presented in Figure 5.3.25 below. Among the institutions in this domain which had sold products outside the country, 44 percent indicated that they sold ten percent while 11 percent sold twenty.

Figure 5.3.25: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by Percentage of Products Sold outside Zimbabwe, CSS Zimbabwe, 2012



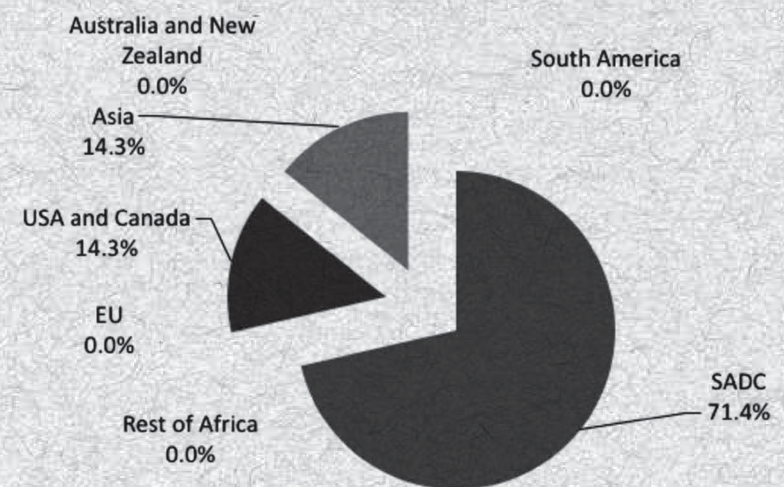
The external markets for individual artists in the Literary Arts and Publishing domain were mainly the SADC (41.7 percent), the EU (29.2 percent), and the USA and Canada (20.8 percent). See Figure 5.3.26 below.

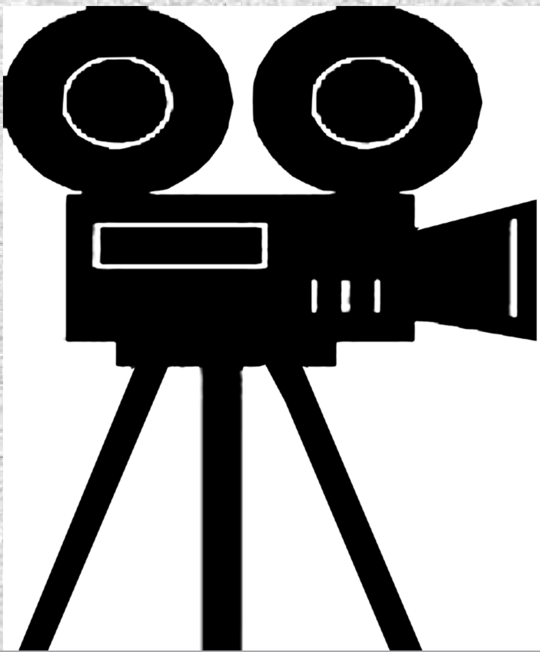
Figure 5.3.26: Percent Distribution of Individual Artists in the Literary Arts and Publishing Domain by External Markets, CSS Zimbabwe, 2012

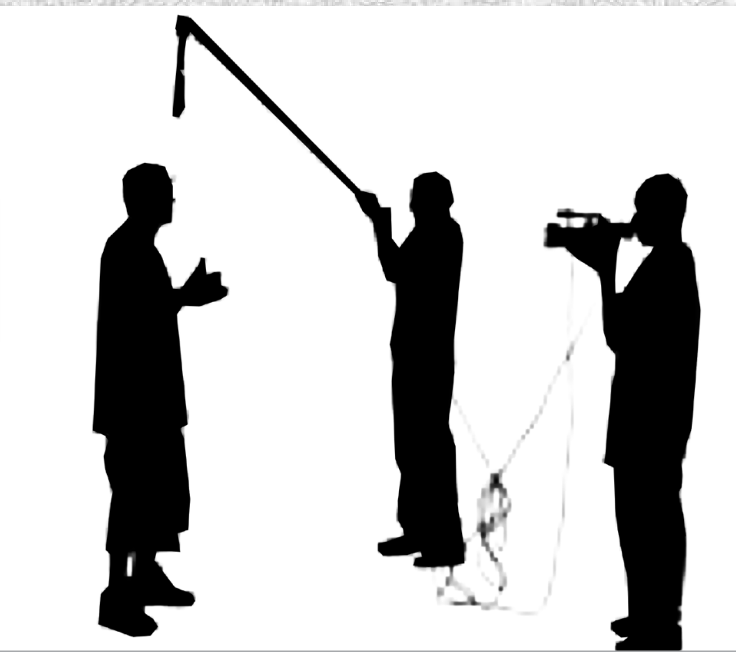


The primary external markets for institutions in this domain were countries in the SADC (71.4 percent). The other external markets were the USA and Canada (14.3 percent) and Asia (14.3 percent). See Figure 5.3.27 below.

Figure 5.3.27: Percent Distribution of Institutions in the Literary Arts and Publishing Domain by External Markets, CSS Zimbabwe, 2012







FILM, AUDIO-VISUAL AND INTERACTIVE MEDIA

5.4 FILM, AUDIO-VISUAL AND INTERACTIVE MEDIA

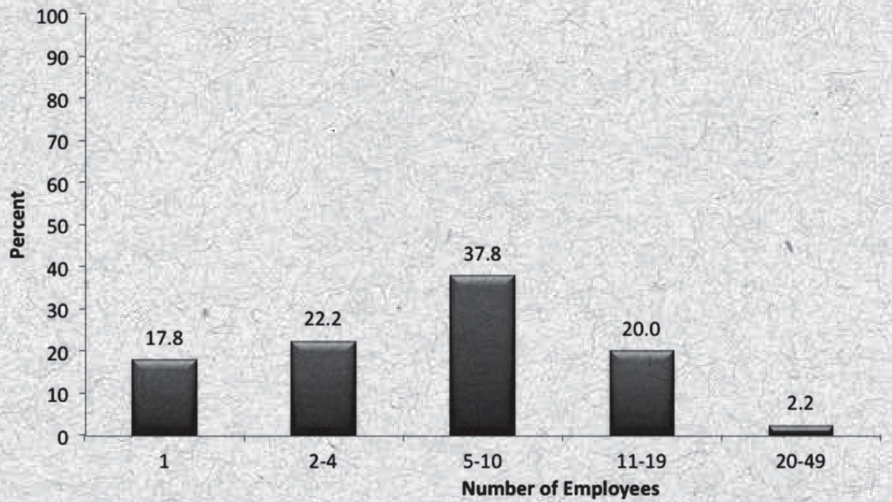
5.4.1 INTRODUCTION

The core elements of this domain are Radio and Television broadcasting including Internet live streaming, Film and Video, and Interactive Media. Interactive Media cover video games and new forms of cultural expression that mainly occur through the Web or with a computer. They include online games, web portals, websites for activities, which relates to social networks such as Facebook, and Internet podcasting such as YouTube. Video games and their development (software design) are also included in this category because they represent an interactive activity.

5.4.2 EMPLOYMENT

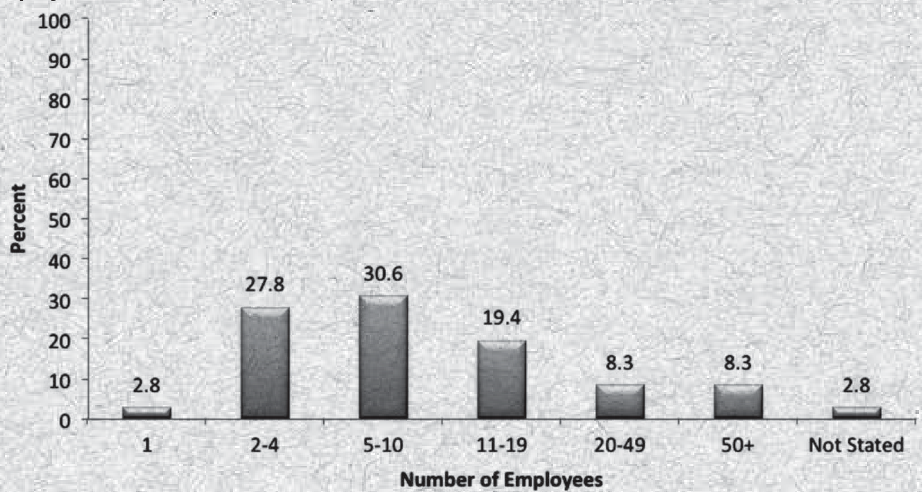
The survey sought information on the number of employees, the nature and lengths of contracts, average income and membership to cultural associations.
Figure 5.4.1 below presents the distribution of persons interviewed in the Film, Audio-Visual and Interactive Media domain by number of employees. Thirty-nine percent had 5 to 10 employees and 22 percent had 2 to 4 employees.

Figure 5.4.1: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Employment Size, CSS Zimbabwe, 2012



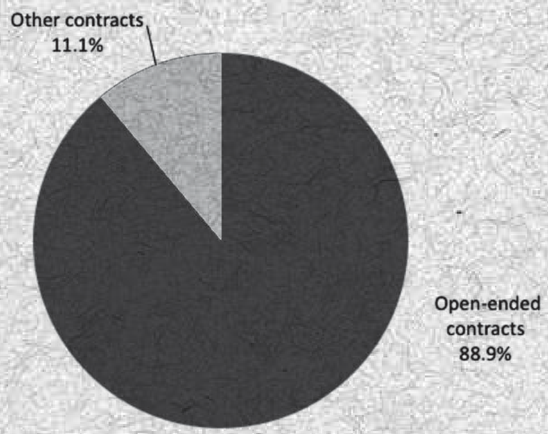
For institutions, 31 percent had 5 to 10 employees while 28 percent had 2 to 4 employees as shown in Figure 5.4.2 below.

Figure 5.4.2: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Employment Size, CSS Zimbabwe, 2012



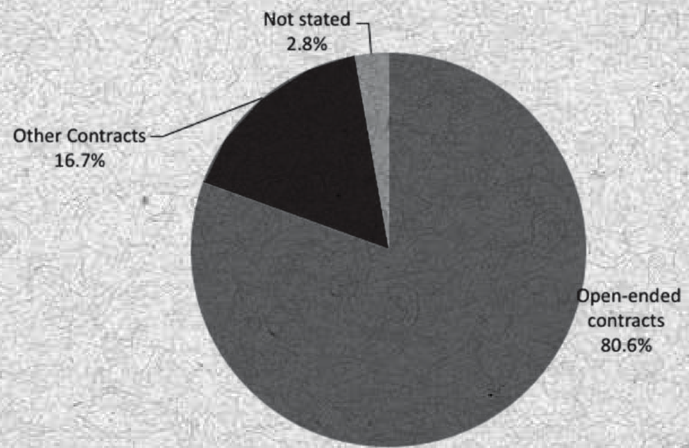
As presented in Figure 5.4.3 below, 89 percent of the institutions in the domain had employees with open-ended contracts while 11 percent had employees with other types of contracts.

Figure 5.4.3: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Average Lengths of Employee Contracts, CSS Zimbabwe, 2012



Amongst the institutions in the Film, Audio-Visual And Interactive Media domain, close to 81 percent had employees with open-ended contracts while around 17 percent had employees with other types of contracts. The results are presented in Table 5.4.4 below.

Figure 5.4.4: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Average Lengths of Employee Contracts, CSS Zimbabwe, 2012



5.4.3 EDUCATION AND TRAINING

Individual artists were asked about the education and training that the principal owners of the businesses had received. The information collected was on the highest level of education completed, whether or not the owners received training for the job that they were doing, formality of training received and the areas of training.

Highest Level of Education Attained by Principal Owners of Businesses

As presented in Table 5.4.1 below, about 67 percent of owners of businesses in the Film, Audio-Visual and Interactive Media domain had tertiary education as their highest level of education, that is, certificates, diplomas and degrees. Twenty percent and 13 percent had secondary school education and Advanced Level, respectively.

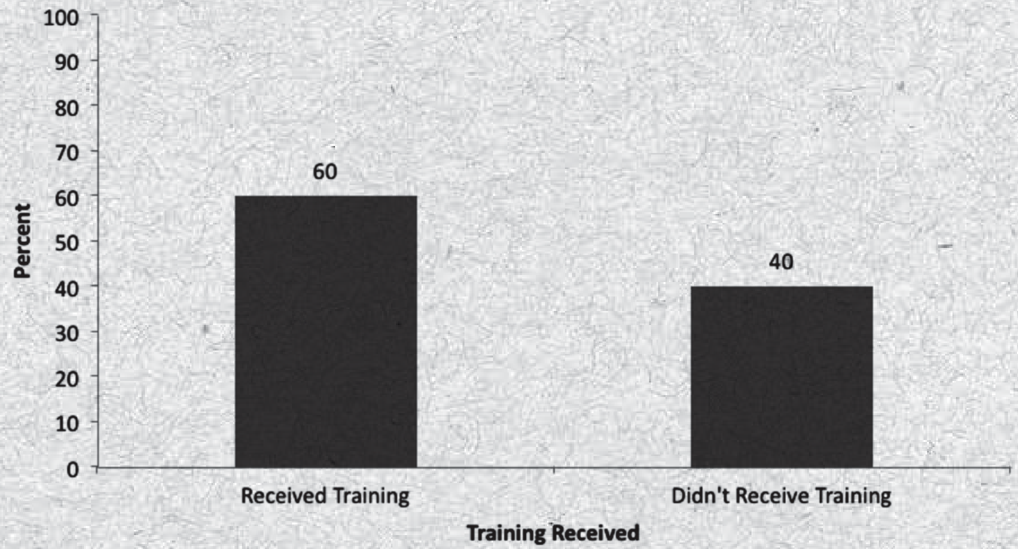
Table 5.4.1: Highest Level of Education Attained by Principal Owners of Businesses in the Film, Audio-Visual and Interactive Media Domain, CSS Zimbabwe, 2012

Highest Level of Education	Percent	Number
Secondary (1 to 4)	20.0	9
'A" Level (5 to 6)	13.3	6
Certificate after Secondary ('O' Level)	15.6	7
Certificate after 'A' Level	8.9	4
Diploma after Secondary ('O' Level)	13.3	6
Diploma after 'A' Level	13.3	6
University Degree	13.3	6
Post Graduate Degree	2.2	1
Total	**100**	**45**

Training

Sixty percent of the individual artists reported that business owners in the domain had received training.

Figure 5.4.5: Percent Distribution of Principal Owners in the Film, Audio-Visual and Interactive Media Domain by Training Received or not, CSS Zimbabwe, 2012



Of those who received training, 56 percent received formal training. See Figure 5.4.6 below.

Figure 5.4.6: Percent Distribution of Principal Owners in the Film, Audio-Visual and Interactive Media Domain by Training Received or not, CSS Zimbabwe, 2012

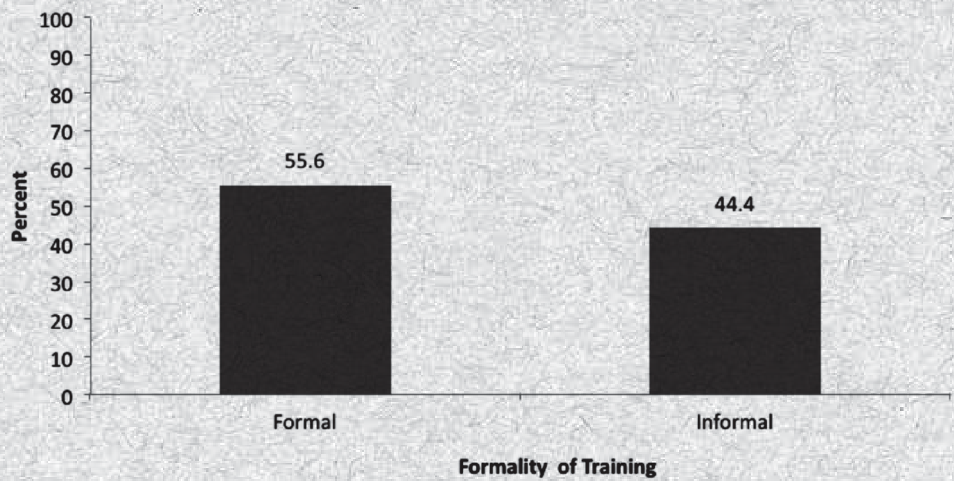
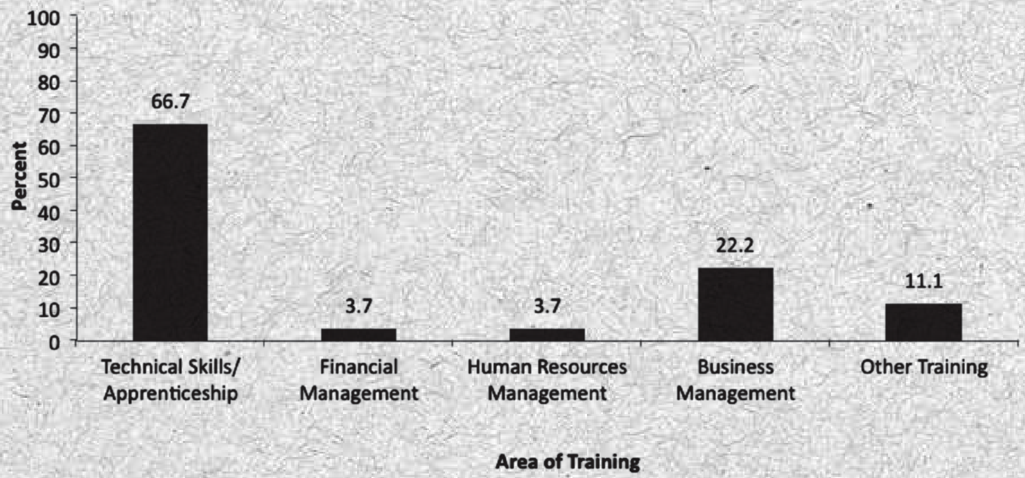


Figure 5.4.7 shows the distribution of principal owners of businesses by the areas of training received. Sixty-seven percent had received technical skills training or apprenticeship. Slightly over 1 in 5 (22.2 percent) of the business owners received training in business management.

Figure 5.4.7: Percent Distribution of Principal Owners of Businesses in the Film, Audio-Visual and Interactive Media Domain by Area of Training Received, CSS Zimbabwe, 2012

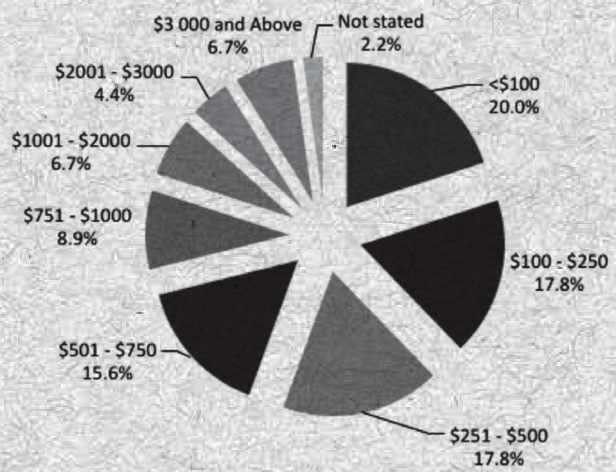


5.4.4 INCOME AND EXPENDITURE

Income in 2011

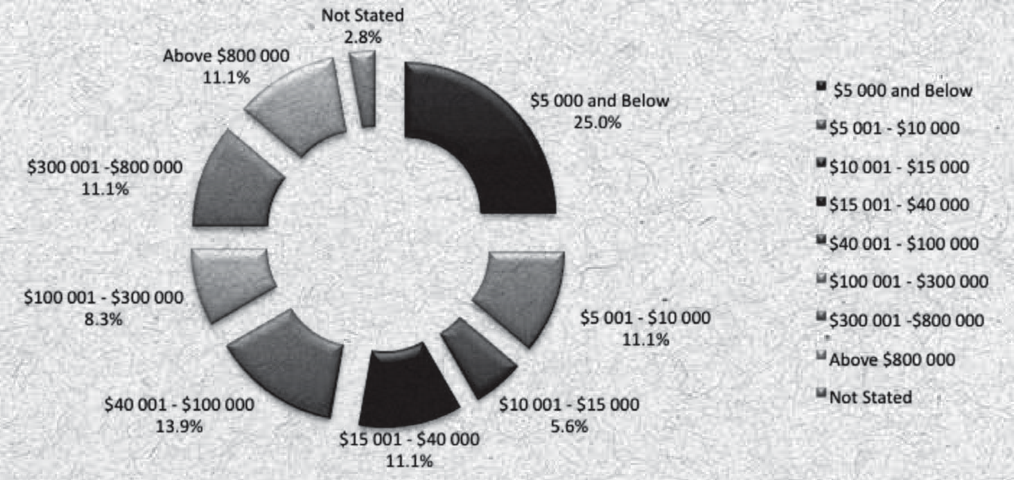
A fifth of the individual artists in this domain had average monthly incomes of less than US$100. Eighteen percent of the artists had incomes of between US$100 and US$250 and another 18 percent had incomes ranging from US$251 to US$500. See Figure 5.4.8 below.

Figure 5.4.8: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Average Monthly Income in the Year 2011, CSS Zimbabwe, 2012



Twenty-five percent of the institutions in the Film, Audio Visual and Interactive Media domain had an annual income of US$5 000 and below whilst for 11 percent it was more than US$800 000. About 14 percent earned between US$40 001 and US$100 000 in the year 2011 as shown in Figure 5.4.9 below.

Figure 5.4.9: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Annual Income for the Year 2011, CSS Zimbabwe, 2012



Expenditure in 2011

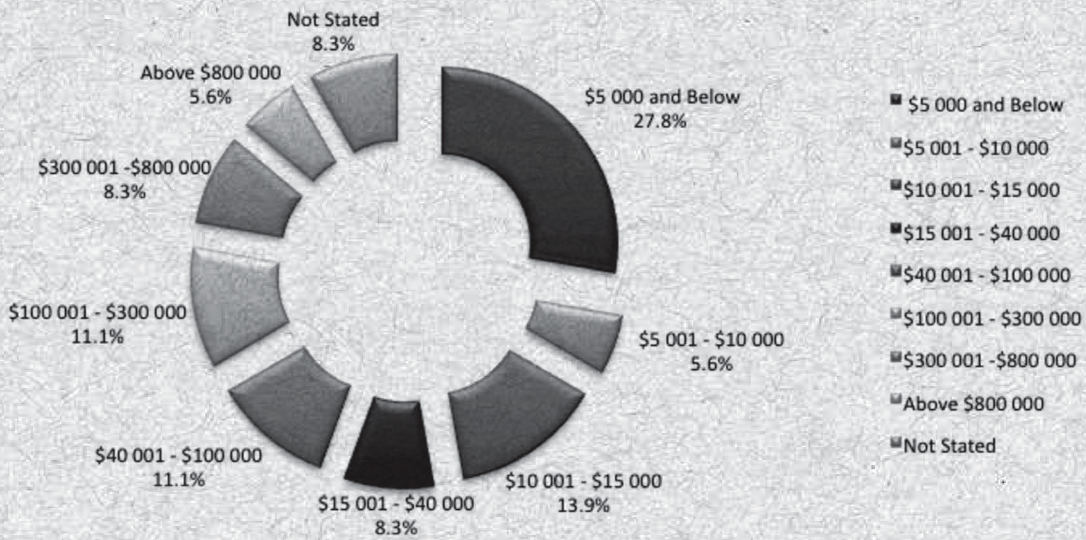
Table 5.4.2 below shows the distribution of individual artists in this domain by average monthly expenditure in the year 2011. A majority (80.0 percent) of the individual artists had a monthly average expenditure less or equal to US$1 000.

Table 5.4.2: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Average Monthly Expenditure in the Year 2011, CSS Zimbabwe, 2012

Expenditure(USD)	Percent	Number
Less than or equal to $1000	80.0	36
$1 001 to $5 000	8.9	4
$5 001 to $10 000	2.2	1
Not stated	8.9	4
Total	**100**	**45**

For institutions in this domain, 28 percent spent US$5 000 and below whilst 8 percent spent more than US$800 000 in 2011. Close to 14 percent spent between US$10 001 and US$15 000 as shown in Figure 5.4.10 below.

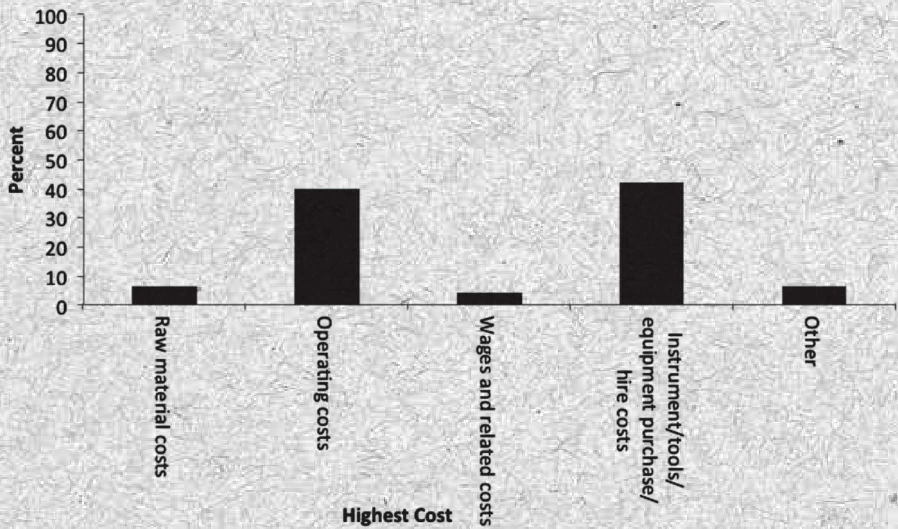
Figure 5.4.10: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Annual Expenditure for the Year 2011, CSS Zimbabwe, 2012



Costs

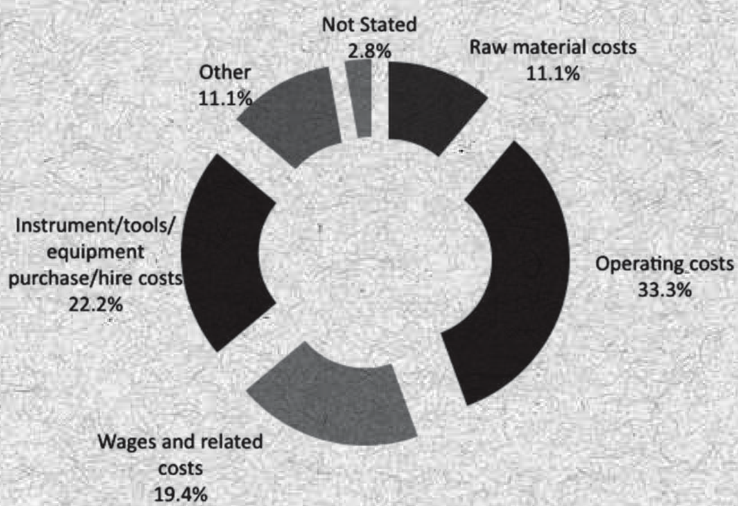
Among the individual artists in the Film, Audio Visual and Interactive Media domain, instrument, tools and equipment purchase or hire costs were cited by 42 percent as the highest cost. Operating costs were cited by 40 percent as shown in Figure 5.4.11 below.

Figure 5.4.11: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Highest Cost, CSS Zimbabwe, 2012



Operating costs were reported by 33 percent of the institutions in this domain as the highest cost as shown in Figure 5.4.12 below. The survey revealed that instrument, tools and equipment purchase or hire costs were the leading cost component for 22 percent of the institutions while 19 percent cited wages and related costs.

Figure 5.4.12: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Highest Cost, CSS Zimbabwe, 2012



About 47 percent of individual artists in the Film, Audio Visual and Interactive Media domain cited operating costs as the second highest cost while 22 percent cited instrument, tools and equipment purchase or hire costs as shown in Figure 5.4.13 below.

Figure 5.4.13: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Second Highest Cost, CSS Zimbabwe, 2012

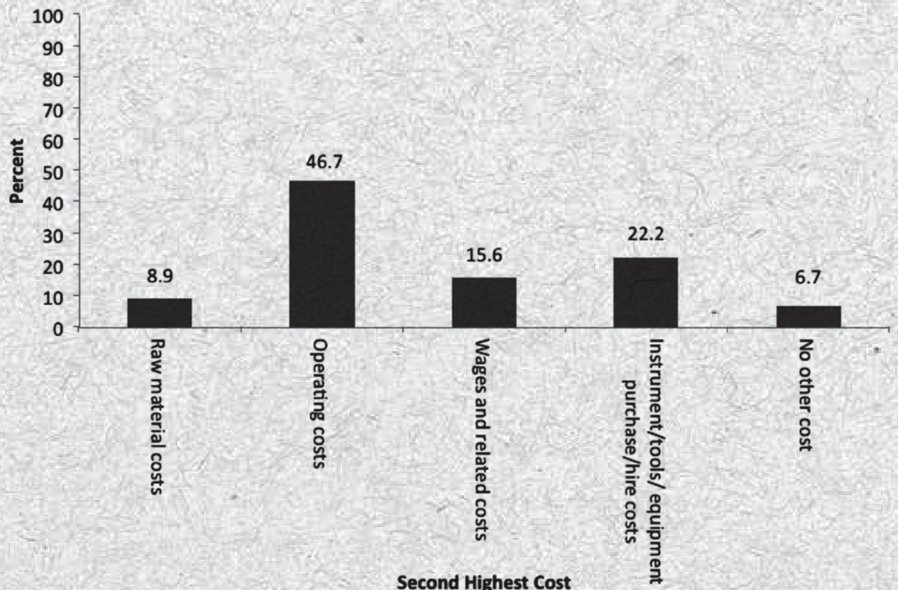
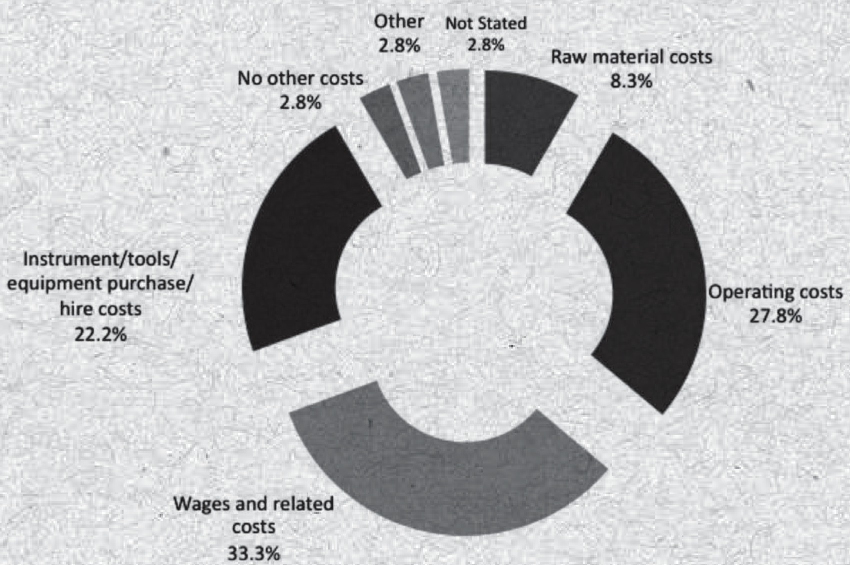


Figure 5.4.14 below shows that a third (33.3 percent) of the institutions in this domain cited wages and related costs as their second highest cost. Twenty-eight percent and 22 percent of the institutions reported operating costs and instrument, tools and equipment purchase or hire, respectively.

Figure 5.4.14: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Second Highest Cost, CSS Zimbabwe, 2012



Main Source of Income in 2011

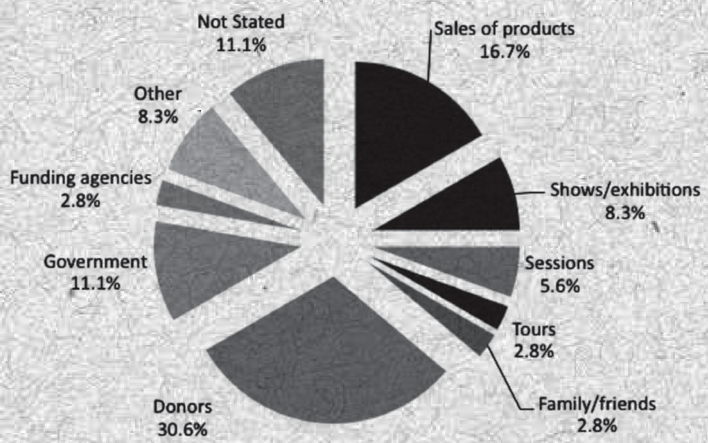
For individual artists in this domain, 36 percent cited shows and exhibitions as the main source of income. Paid-employment in non-cultural activities was the main source of income for 27 percent of them. Sales of products were the leading source of income for 16 percent of the individual artists. See Table 5.4.3 below.

Table 5.4.3: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Main Source of Income, CSS Zimbabwe, 2012

Main Source of Income	Percent	Number
Sales of products	15.6	7
Shows/exhibitions	35.6	16
Sessions	2.2	1
Royalties	4.4	2
Paid employment in non-cultural activities	26.7	12
Not in arts business 2011	8.9	4
Other	6.7	3
Total	**100**	**45**

The significant role played by donors in the cultural industry was evident in the Film, Audio Visual and Interactive Media domain with 31 percent of the institutions indicating that they had received most of their income from donors. Close to 17 percent of the institutions reported that their main source of income was sales of products, while the Government was the leading source of income for 11 percent of the institutions. See Figure 5.4.15 below.

Figure 5.4.15: Percent Distribution of Institutions in the Film, Audio Visual and Interactive Media Domain by Main Source of Income, CSS Zimbabwe, 2012



Secondary Source of Income in 2011

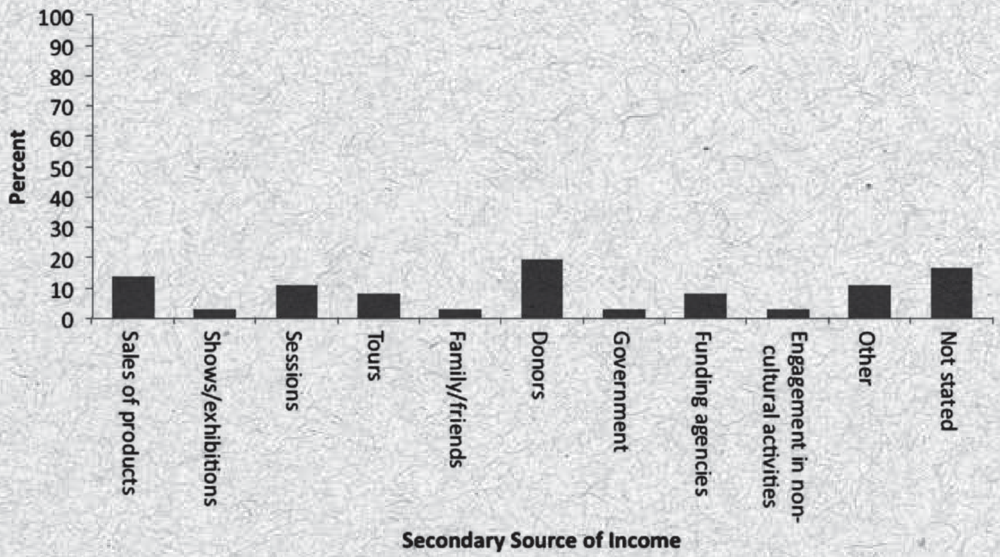
Sales of products were reported by 20 percent of individual artists as the secondary source of income in this domain, while 12 percent indicated paid-employment outside cultural activities. Ten percent each cited shows and exhibitions, sessions, and family or friends as their secondary source of income as shown in Table 5.4.4 below.

Table 5.4.4: Percent Distribution of Individual Artists in the Film, Audio Visual and Interactive Media Domain by Secondary Source of Income, CSS Zimbabwe, 2012

Secondary Source of Income	Percent	Number
Sales of products	19.5	8
Shows/exhibitions	9.8	4
Sessions	9.8	4
Royalties	2.4	1
Family/friends	9.8	4
Paid employment in non-cultural activities	12.2	5
No Secondary source	31.7	13
Other	4.9	2
Total	**100**	**41**

Close to 20 percent of the institutions in the Film, Audio Visual and Interactive Media domain cited donors as their second highest source of income while 14 percent reported sales of products as their second highest source. Sessions were reported as the second highest source of income by 11 percent of the institutions as shown in Figure 5.4.16 below.

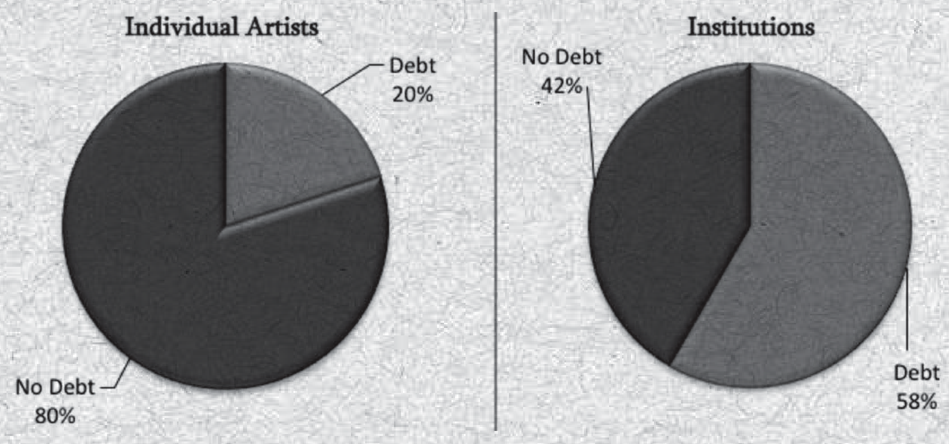
Figure 5.4.16: Percent Distribution of Institutions in the Film, Audio Visual and Interactive Media Domain by Secondary Source of Income, CSS Zimbabwe, 2012



5.4.5 DEBTS/LIABILITIES

Of the individual artists and institutions in the Film, Audio-Visual and Interactive Media, 20 percent and 58 percent, respectively, indicated that they had incurred debts as shown in Figure 5.4.17 below.

Figure 5.4.17: Percent Distribution of Individual Artists and Institutions in the Film, Audio-Visual and Interactive Media Domain by Debts, CSS Zimbabwe, 2012



As shown in Table 5.4.5 below, 33 percent each of individual artists in the domain indicated that they had debt that ranged between US$500 and US$999 and US$2 000 and US$4 999.

Table 5.4.5: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

Estimate of Debts (USD)	Percent	Number
$1 - $99	11.1	1
$200- $499	11.1	1
$500 - $999	33.3	3
$1 000 - $1 499	11.1	1
$2 000- $4 999	33.3	3
Total	**100**	**9**

As shown in Table 5.5.6 below, about a quarter (23.8 percent) indicated that their debt ranged between US$1 000 and US$4 999, nearly 20 percent had debt ranging between US$5 000 and US$ 999 and 14 percent had debt ranging between US$20 000 and US$49 999.

Table 5.4.6: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

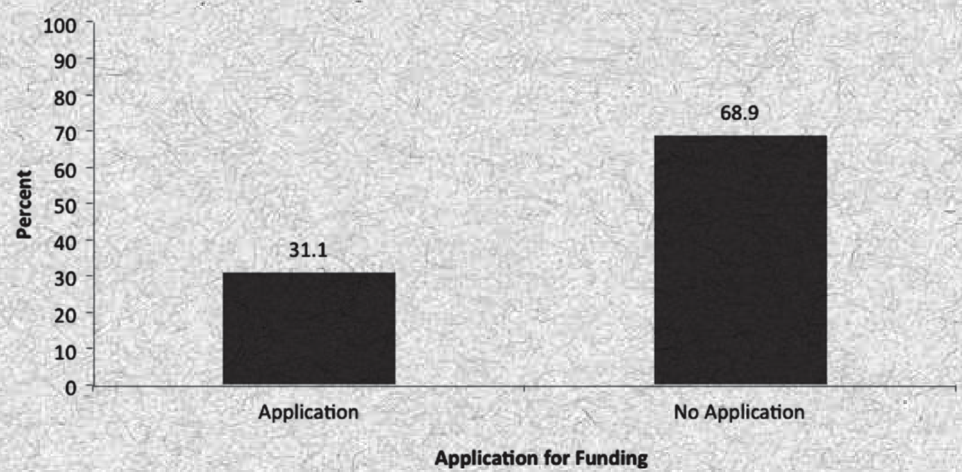
Estimate of Debts (USD)	Percent	Number
$500 - $999	4.8	1
$1000- $4999	23.8	5
$5000 - $9999	19.1	4
$10 000 - $14 999	9.5	2
$15 000 - $19 999	9.5	2
$20 000 - $49 999	14.3	3
$50 000- $99 999	4.8	1
Above $100 000	9.5	2
Not Stated	4.8	1
Total	**100**	**21**

5.4.6 FUNDING AND MARKETING

Application for Funding

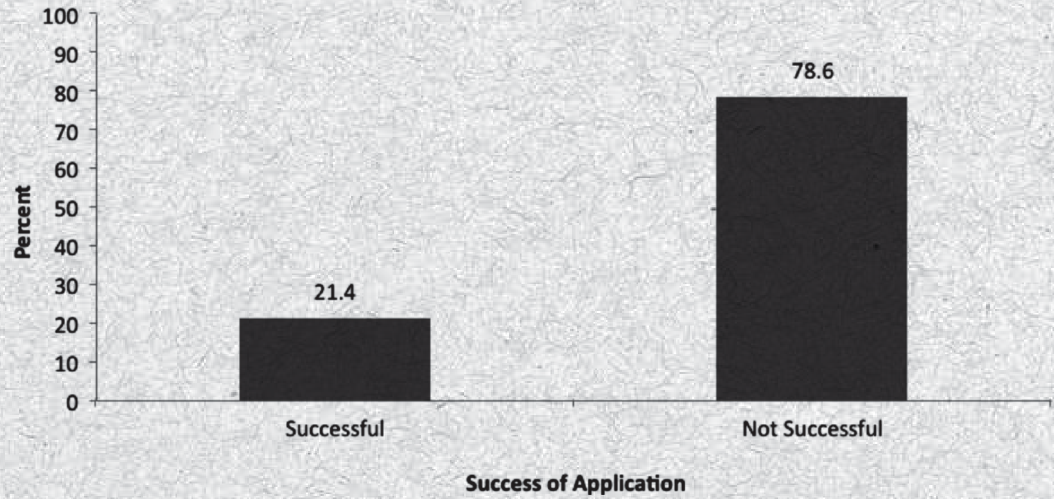
About 31 percent of the individual artists in the Film, Audio-Visual and Interactive Media domain indicated that they had applied for funding in the two years preceding the survey as shown in Figure 5.4.18 below.

Figure 5.4.18: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media by Application for Funding, CSS Zimbabwe, 2012



About 21 percent of the individual artists who had applied for funding indicated that they had been successful as shown in Figure 5.4.19 below.

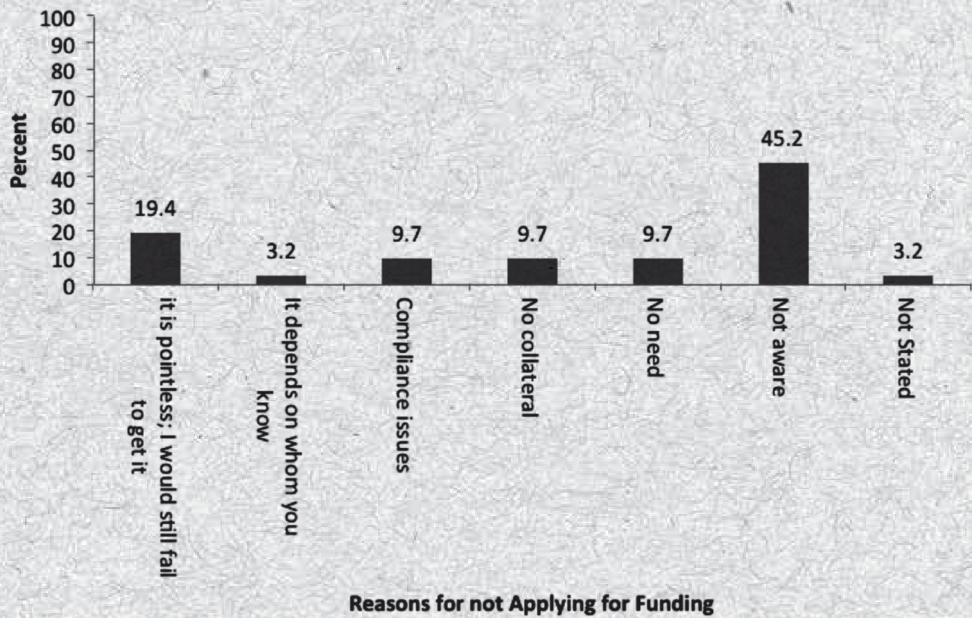
Figure 5.4.19: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Success of Application for Funding, CSS Zimbabwe, 2012



Main Reason for not Applying for Funding

All individual artists who indicated that they had not applied for funding in the two years preceding the survey were asked the major reason for not having done so. Forty-five percent of the artists indicated that they were “Not aware” and 19 percent cited the futility of application as shown in Figure 5.4.20 below.

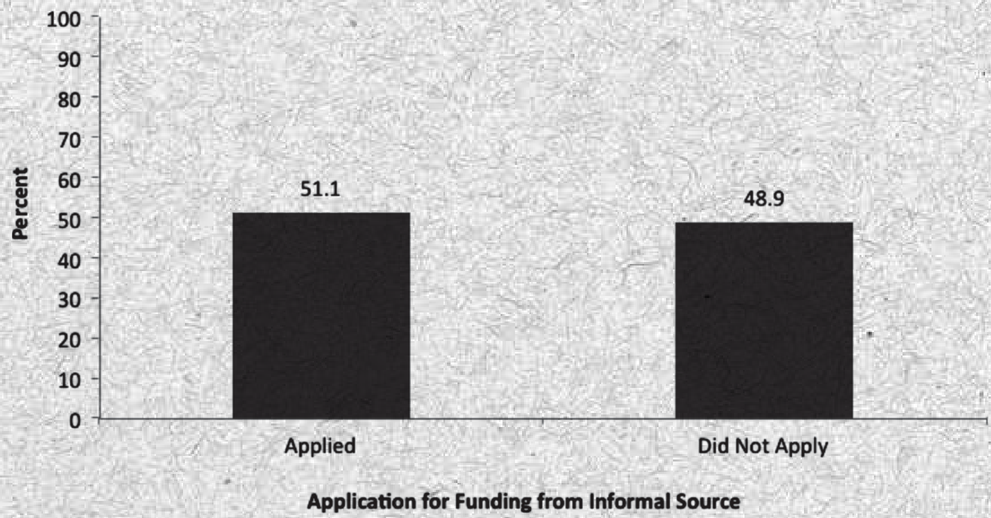
Figure 5.4.20: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Main Reason for not Applying for Funding, CSS Zimbabwe, 2012



Funding from Informal Sources

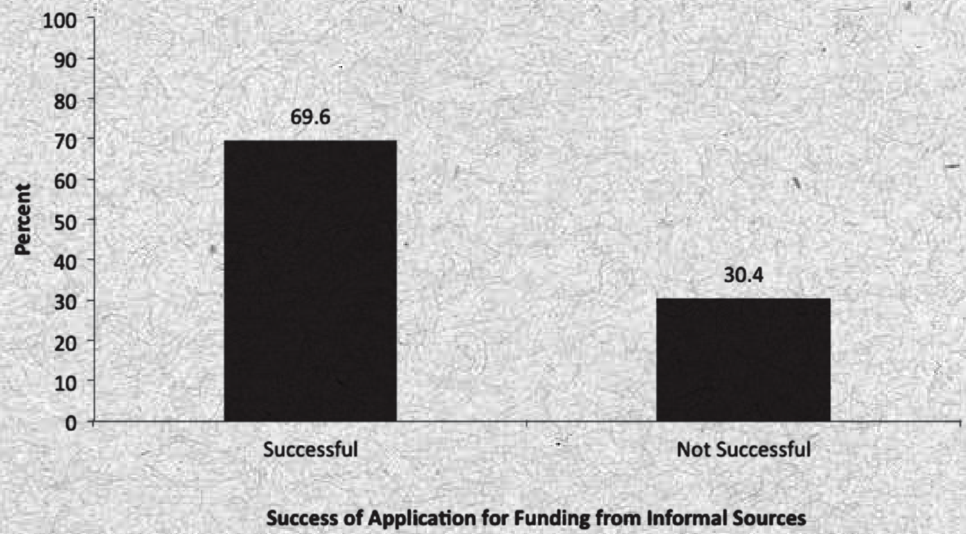
In relation to funding from informal sources, slightly above half (51.1 percent) of the artists in the Film, Audio-Visual and Interactive Media domain indicated that they had approached informal sources such as unregistered money lenders, friends or relatives for capital as shown in Figure 5.4.21 below.

Figure 5.4.21: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Application of Funding from Informal Sources, CSS Zimbabwe, 2012



Nearly 7 out of every 10 (69.6 percent) of the individual artists in this domain who approached informal sources for funding were successful as shown in Figure 5.4.22 below.

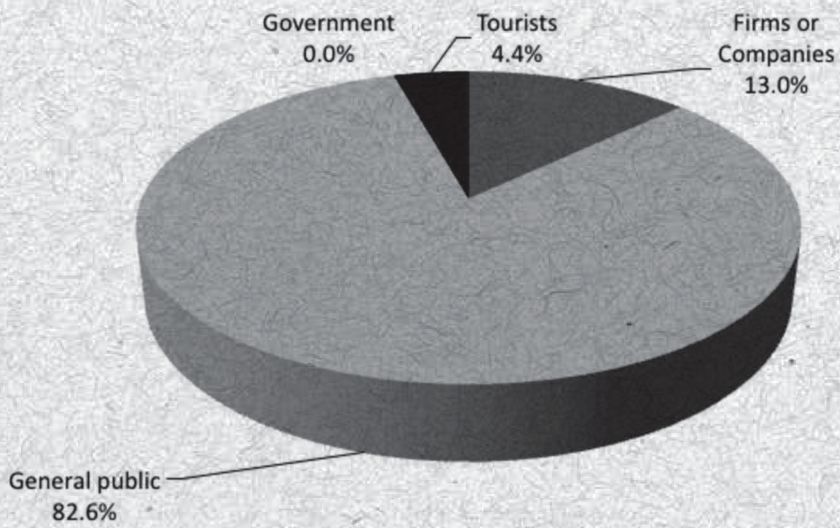
Figure 5.4.22: Percent Distribution of Individual Artists in Film, Audio-Visual and Interactive Media Domain by Success of Application for Funding from Informal Sources, CSS Zimbabwe, 2012



Marketing

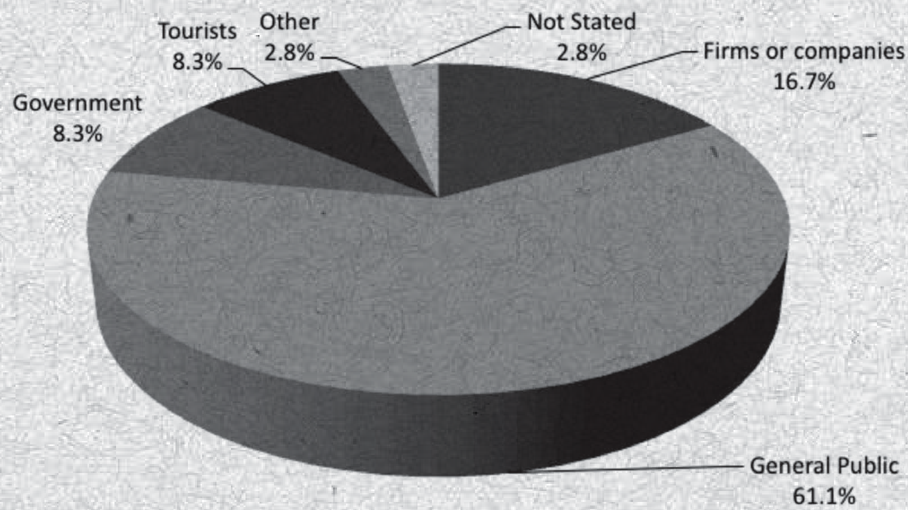
The main markets for individual artists in the Film, Audio-Visual and Interactive Media were principally the general public (82.6 percent) and companies (13.0 percent) as shown in Figure 5.4.23 below.

Figure 5.4.23: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Main Markets, CSS Zimbabwe, 2012



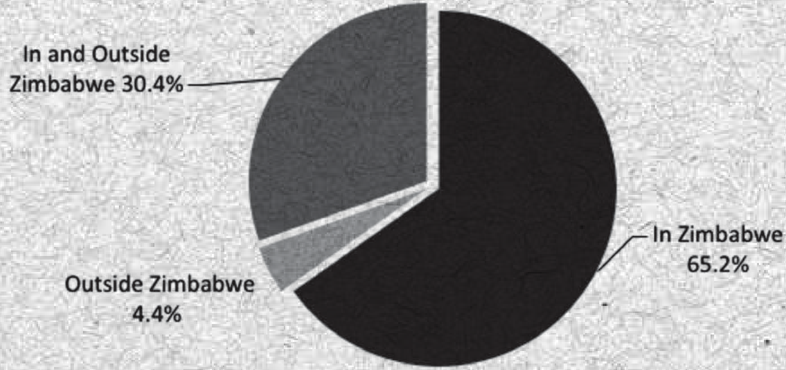
About 61 percent of the institutions in this domain cited the general public as the main market for their products as shown in Figure 5.4.24 below. The other significant markets were companies (16.7 percent), Government (8.3 percent) and tourists (8.3 percent).

Figure 5.4.24: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Main Markets, CSS Zimbabwe, 2012



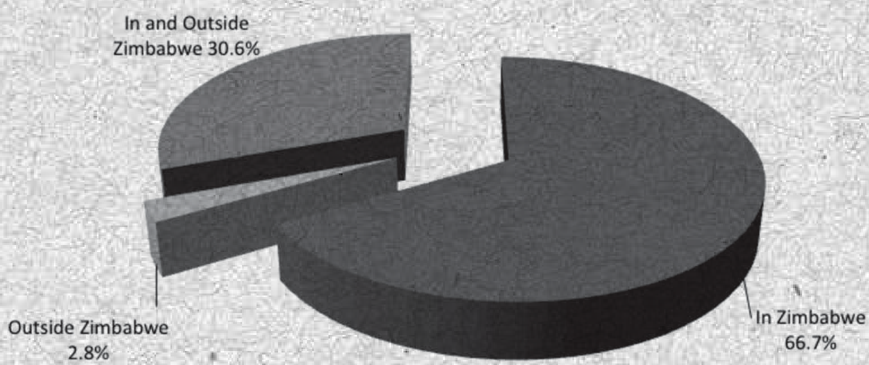
The predominant market for the individual artists in the Film, Audio-Visual and Interactive Media domain was the local market (65.2 percent). Thirty percent of the artists in this domain indicated that they had sold their products in and outside Zimbabwe while 4 percent had sold their products outside the country as shown in Figure 5.4.25 below.

Figure 5.4.25: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Location of Markets, CSS Zimbabwe, 2012



Of the institutions in this domain, 68 percent indicated that they had sold their products in Zimbabwe as shown in Figure 5.4.26 below. Thirty-one percent had sold their products both in and outside the country whilst three percent had sold their products externally.

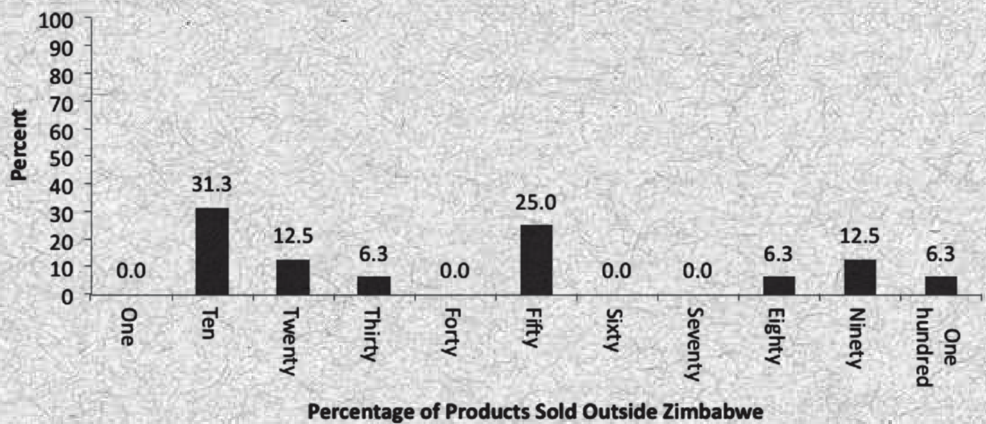
Figure 5.4.26: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Location of Markets, CSS Zimbabwe, 2012



External Markets

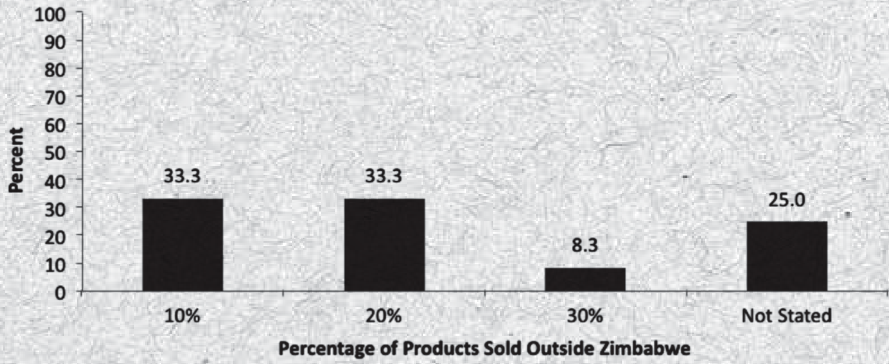
The breakdown of the percentage of products sold outside the country by individual artists in this domain is presented in Figure 5.4.27. Among the artists who had sold products outside the country, 3 in every 10 (31.3 percent) indicated that they had sold ten percent of their products externally. A quarter of the artists had sold fifty percent of their products outside the country.

Figure 5.4.27: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



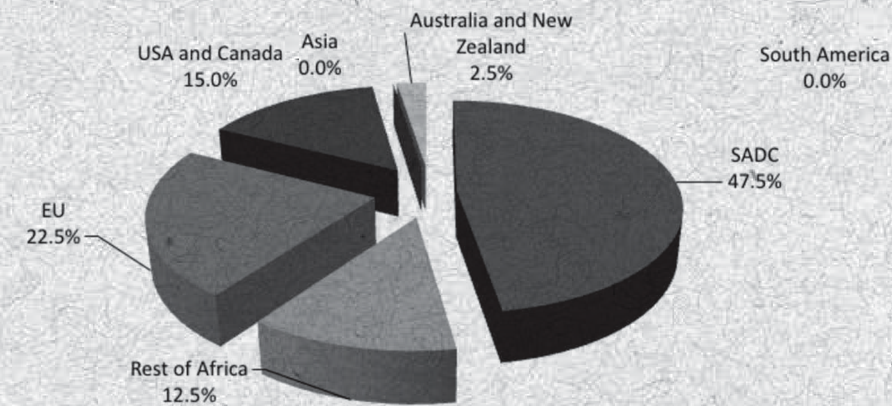
Among the institutions which had sold products outside the country, 33 percent each indicated that they had sold ten percent and twenty percent, respectively, as presented in Figure 5.4.28 below. Eight percent of the institutions sold thirty percent of their products outside the country.

Figure 5.4.28: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



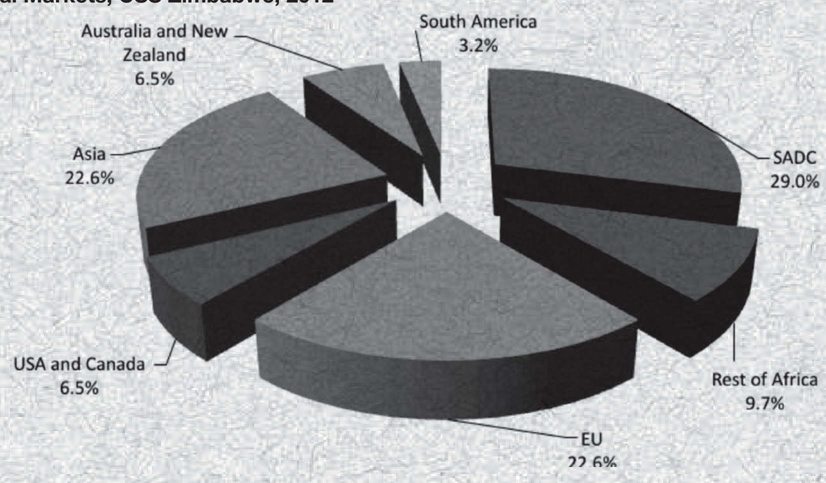
The external markets for individual artists in the Film, Audio-Visual and Interactive Media domain were mainly the SADC (47.5 percent), the EU (22.5 percent), and the USA and Canada (15.0 percent). The Rest of Africa was cited by 13 percent of the individual artists in the domain as shown in Figure 5.4.29 below.

Figure 5.4.29: Percent Distribution of Individual Artists in the Film, Audio-Visual and Interactive Media Domain by External Markets, CSS Zimbabwe, 2012



The distribution of external markets for institutions in this domain is presented in Figure 5.4.30 below. The major external markets reported by institutions in the domain were the SADC (29.0 percent), Asia (22.6 percent) and the EU (22.6 percent).

Figure 5.4.30: Percent Distribution of Institutions in the Film, Audio-Visual and Interactive Media Domain by External Markets, CSS Zimbabwe, 2012



DESIGN AND CREATIVE SERVICES

5.5 DESIGN AND CREATIVE SERVICES

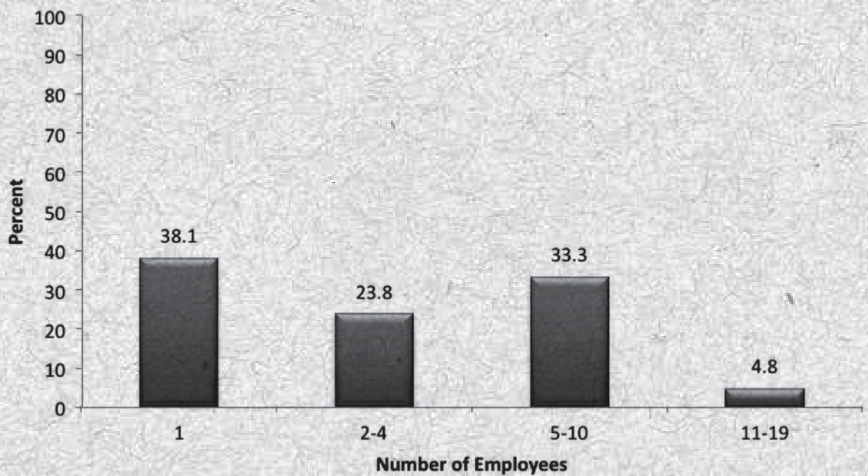
5.5.1 INTRODUCTION

This domain covers the activities, goods and services resulting from the creative, artistic and aesthetic design of objects, buildings and landscape. The domain includes Fashion, Graphic and Interior Design, Landscape Design, Architectural and Advertising Services. Architecture and Advertising are part of the core cultural domains, but only as services. The primary purpose of architectural and advertising services is to provide a creative service, or an intermediary input, into a final product that is not always cultural. For example, the final product of creative advertising services may be a commercial advertisement, generated by some creative activity.

5.5.2 EMPLOYMENT

The survey asked questions on the number of employees, the nature and lengths of contracts, average income and membership to cultural associations.
Amongst those interviewed from the Design and Creative Services, 38 percent of the individual artists work alone while 33 percent had 5 and 10 employees. The results are presented in Figure 5.5.1 below.

Figure 5.5.1: Percent Distribution of Individual Artists in the Design and Creative Service Domain by Employment Size, CSS Zimbabwe, 2012



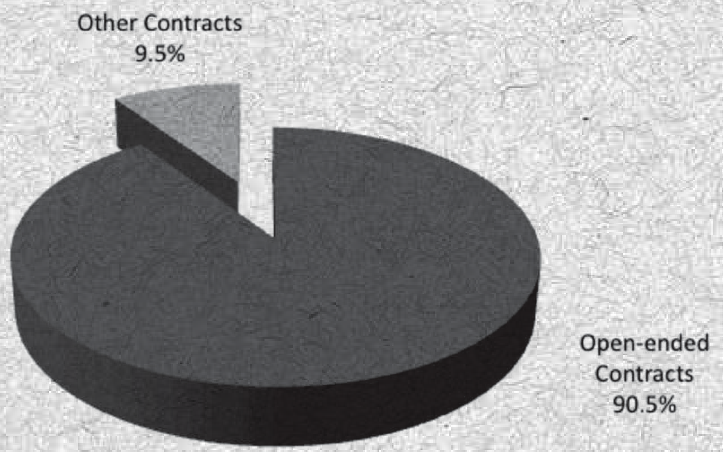
For institutions in this domain, 21 percent each had number of employees between 2-4; 5-10; 11-19 and over 50 as shown in Figure 5.5.2 below.

Figure 5.5.2: Percent Distribution of Institutions in the Design and Creative Service Domain by Employment Size, CSS Zimbabwe, 2012

Average Lengths of Contracts

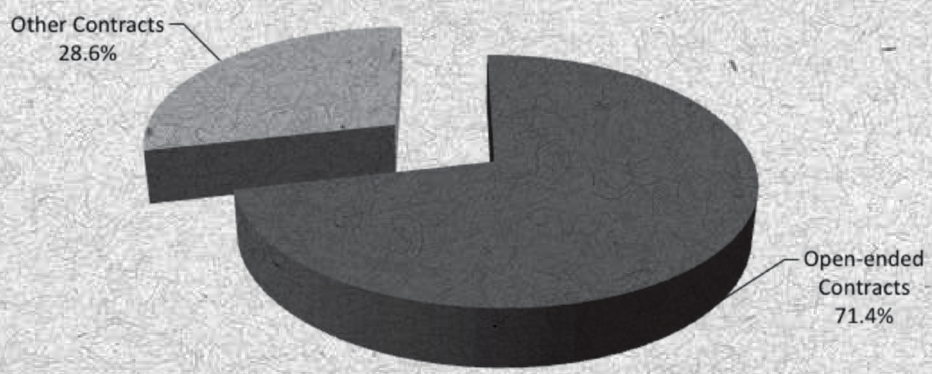
Figure 5.5.3 presents the distribution of the individual artists in this domain by the average lengths of employee contracts. Slightly above 90 percent of the persons interviewed had employees with open-ended contracts while close to 10 percent had employees with other types of contracts.

Figure 5.5.3: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Average Lengths of Contracts of Employees, CSS Zimbabwe, 2012



For institutions in the domain, 71 percent had employees with open-ended contracts while close to 29 percent had employees with other types of contract as shown in Figure 5.5.4 below.

Figure 5.5.4: Percent Distribution of Institutions in the Design and Creative Services Domain by Average Lengths of Contracts of Employees, CSS Zimbabwe, 2012



5.5.3 EDUCATION AND TRAINING

Individual artists were asked about the education and training that the principal owners of the businesses had received. The information collected was on highest level of education completed, whether or not the owner received training for the job that they were doing, formality of training received and the areas of training.

Highest Level of Education Attained by Principal Owners of Businesses

In the Design and Creative Services domain, about a third (33.3 percent) of the principal business owners had a certificate after 'O' level and 81 percent had at least a tertiary qualification. The results are shown in Table 5.5.1 below.

Table 5.5.1: Highest Level of Education Attained by Principal Owners of Businesses in the Design and Creative Services Domain, CSS Zimbabwe, 2012

Highest Level of Education	Percent	Number
Secondary (1 to 4)	19.1	4
Certificate after Secondary ('O' Level)	33.3	7
Certificate after 'A' Level	4.8	1
Diploma after Primary	4.8	1
Diploma after Secondary ('O' Level)	4.8	1
Diploma after 'A' Level	14.3	3
University Degree	19.1	4
Total	**100**	**21**

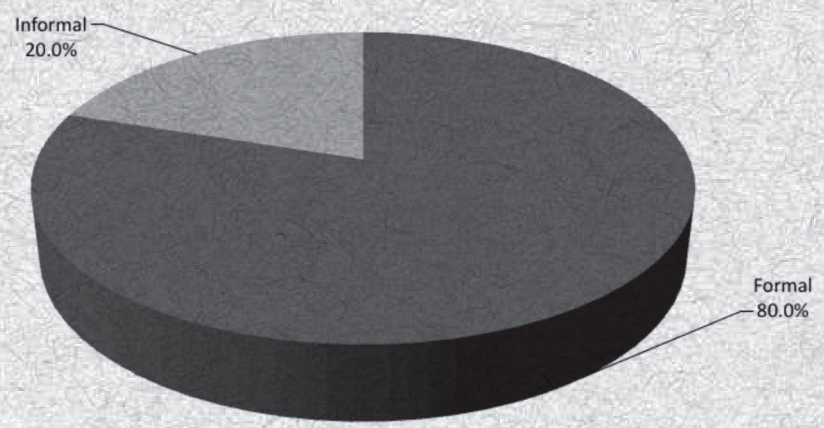
Training

As shown in Figure 5.5.5 below, slightly below half (48 percent) of the principal business owners in the Design and Creative Services domain had received some form of training.

Figure 5.5.5: Percent Distribution of Principal Owners in the Design and Creative Services Domain by Training, CSS Zimbabwe, 2012

A majority, 80 percent, of the individual artists indicated that the training they had received was formal as shown in Figure 5.5.6 below.

Figure 5.5.6: Percent Distribution of Principal Business Owners in the Design and Creative Services Domain by Type of Training, CSS Zimbabwe, 2012



Of the principal owners businesses who had received training, 60 percent received technical skills training or apprenticeship while 20 percent received business management skills training. The results are presented in Figure 5.5.7 below.

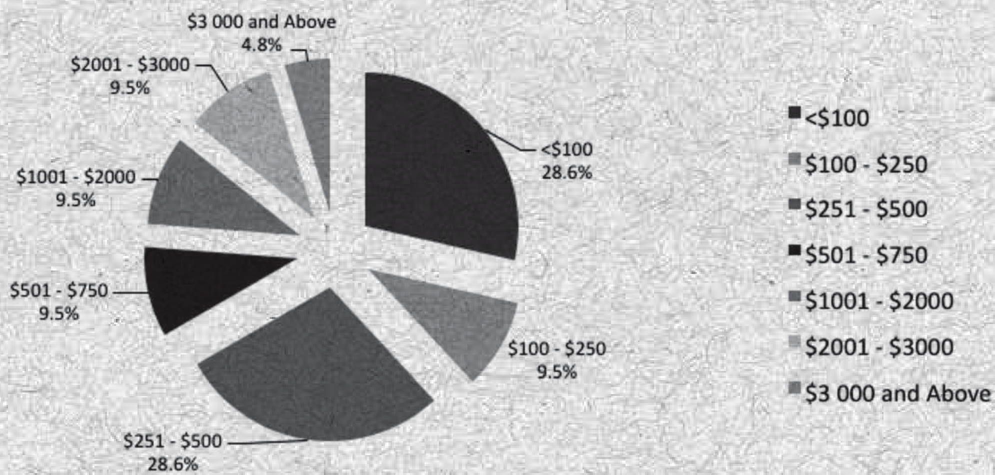
Figure 5.5.7: Percent Distribution of Principal Business Owners in the Design and Creative Services Domain by Area of Training Received, CSS Zimbabwe, 2012

5.5.4 INCOME AND EXPENDITURE

Income in 2011

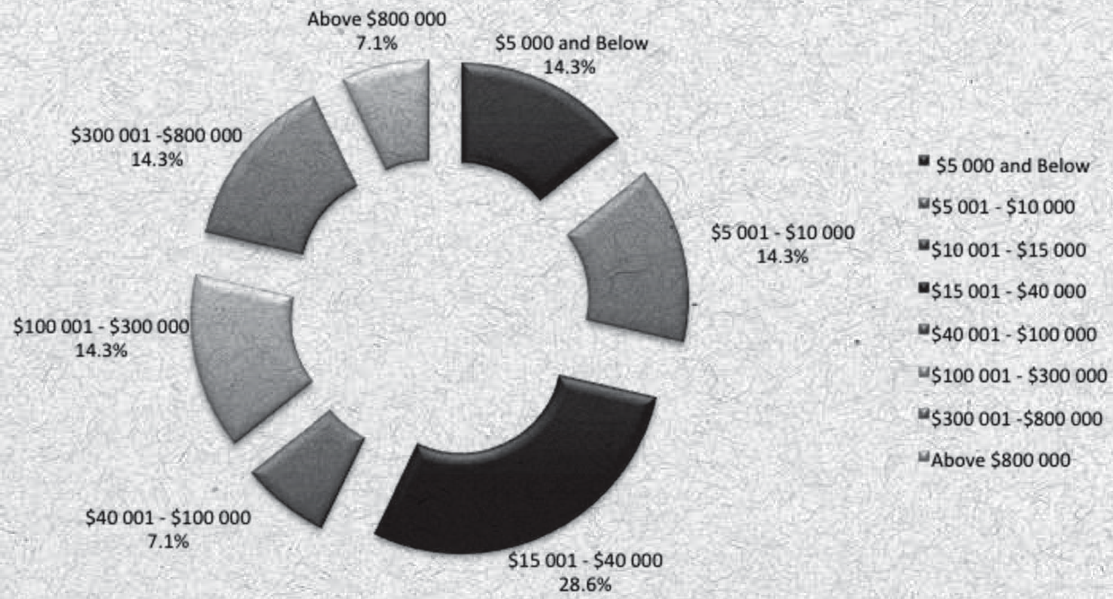
In the Design and Creative Services domain, 29 percent of the individual artists earned an average of less than US$100 per month and another 29 percent earned between US$251 and US$500 in the year 2011. See Figure 5.5.8 below.

Figure 5.5.8: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Annual Income for the Year 2011, CSS Zimbabwe, 2012



A greater proportion of the institutions (28.6 percent) in this domain had average earnings of between US$15 001 and US$40 000 in the year 2011. Fourteen percent had average earnings of US$5 000 and below while 7.1 percent had annual earnings of more than US$800 000 as shown in Figure 5.5.9 below.

Figure 5.5.9: Percent Distribution of Institutions in the Design and Creative Services Domain by Average Monthly Income in the Year 2011, CSS Zimbabwe, 2012



Expenditure in 2011

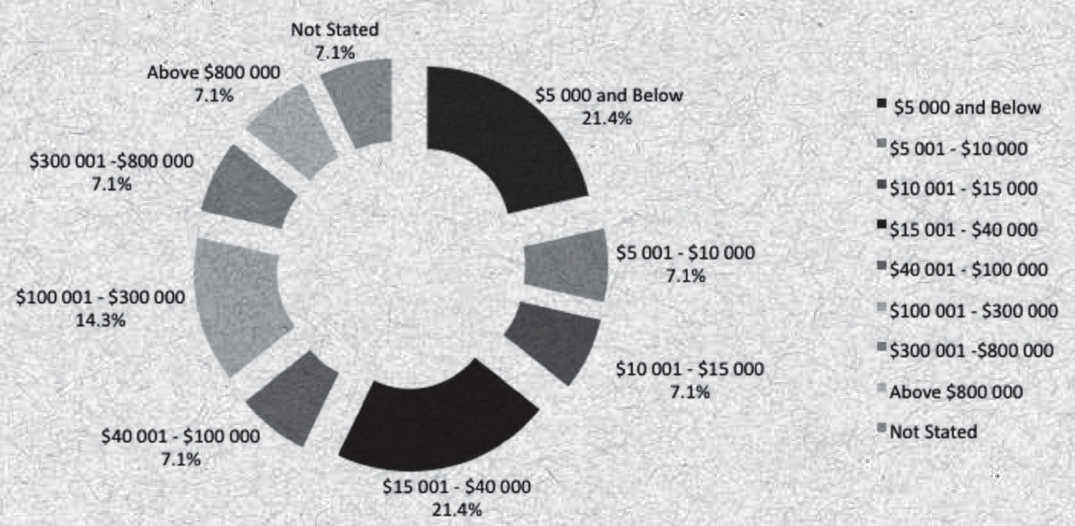
A majority, 81 percent, in the domain had expenditure of less than US$1 000 as shown in Table 5.5.2 below.

Table 5.5.2: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Average Monthly Expenditure for 2011, CSS Zimbabwe 2012

Expenditure (USD)	Percent	Number
Less than or equal to $1 000	81.0	17
$1 001 - $5 000	9.5	2
Not stated	9.5	2
Total	**100**	**21**

Twenty-one percent of the institutions in this domain spent US$5 000 and below whilst 7 percent spent more than US$800 000 on operational costs as shown in Figure 5.5.10 below.

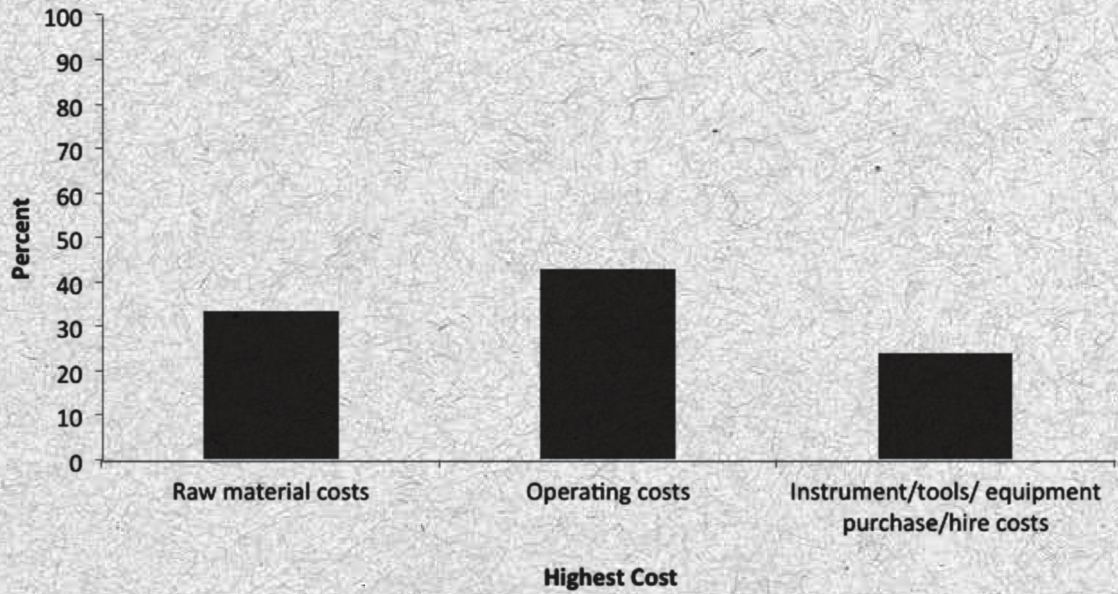
Figure 5.5.10: Percent Distribution of Institutions in the Design and Creative Services Domain by Annual Estimates of Expenditure for 2011, CSS Zimbabwe 2012



Costs

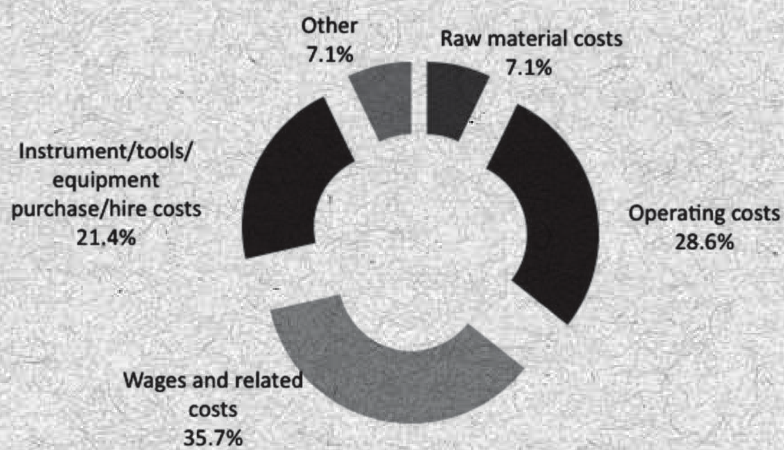
Individual artists were asked what they spent most of their money on in their businesses. About 43 percent of the individual artists in this domain cited operating costs as their highest cost while 33 percent reported raw material costs as their highest as shown in Figure 5.5.11 below.

Figure 5.5.11: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Highest Costs, CSS Zimbabwe 2012



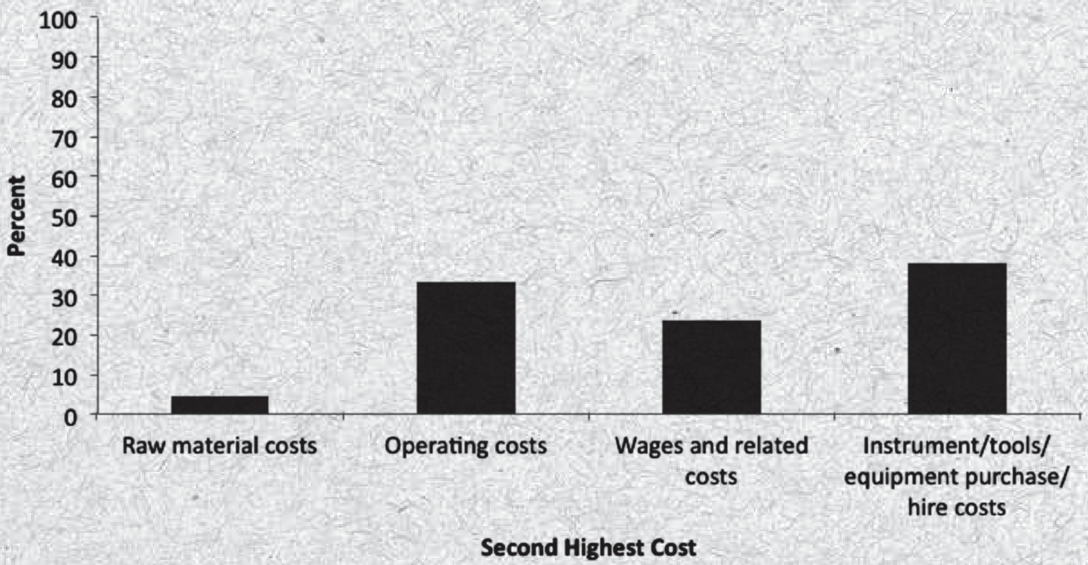
For institutions, information on what they spent most of their money on in their businesses was sought. Thirty-five percent of the institutions in this domain cited wages and related costs as the highest cost while 29 percent reported operating costs. About 21 percent indicated that their highest cost was equipment hire or purchase. See Figure 5.5.12 below.

Figure 5.5.12: Percent Distribution of Institutions in the Design and Creative Services Domain by Highest Costs, CSS Zimbabwe 2012



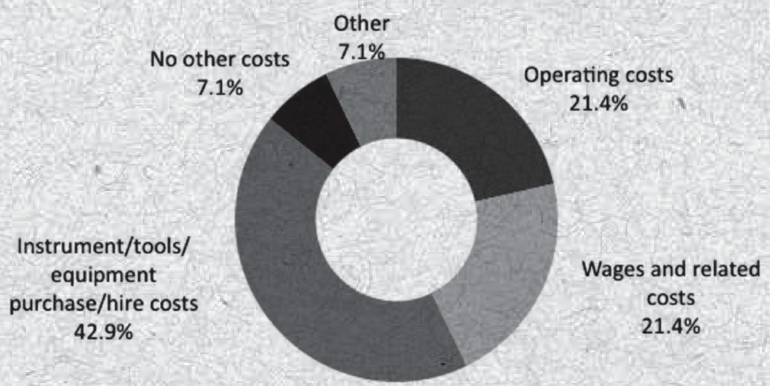
Over 42 percent of individual artists in domain reported purchase or hire costs of instrument, tools and equipment as their second highest cost while 33 percent cited operating costs as shown in Figure 5.5.13.

Figure 5.5.13: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Second Highest Costs, CSS Zimbabwe 2012



Over 42 percent of institutions in this domain reported purchase or hire costs of instrument, tools and equipment as their second highest cost item while 21 percent apiece cited wages and related costs as well as operating costs as shown in Figure 5.5.14 below.

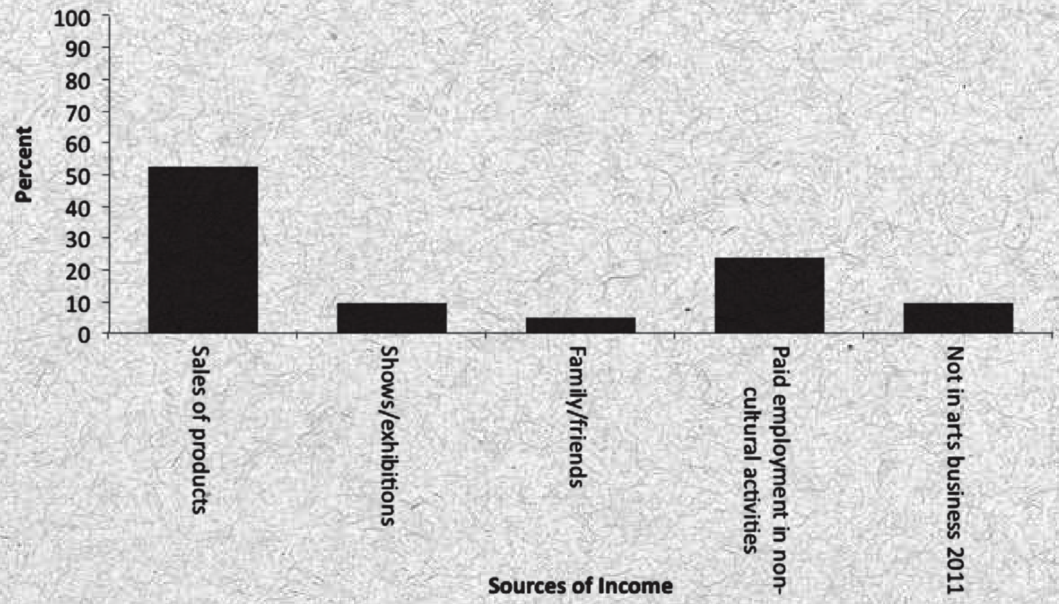
Figure 5.5.14: Percent Distribution of Institutions in the Design and Creative Services Domain by Second Highest Costs, CSS Zimbabwe 2012



Income in 2011

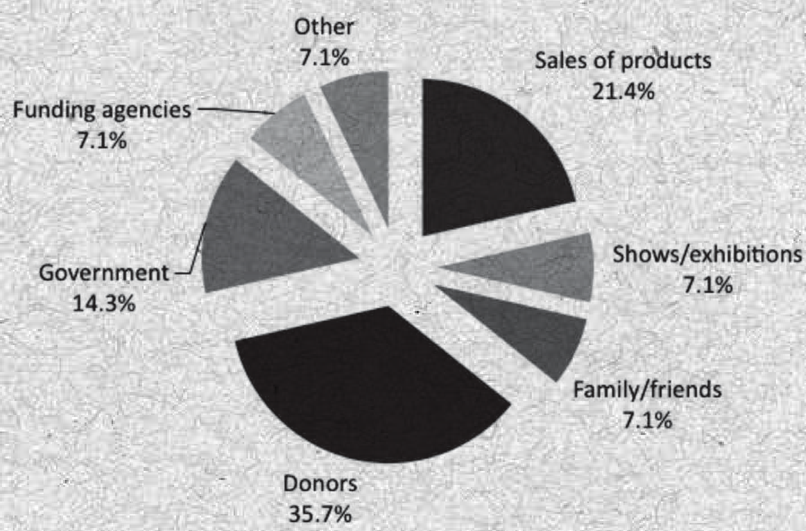
More than half (52.4 percent) of the individual artists in this domain cited sales of products as their main source of income. Twenty-four percent received most of their income from paid-employment in non-cultural activities as shown in Figure 5.5.15.

Figure 5.5.15: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Main Source of Income, CSS Zimbabwe 2012



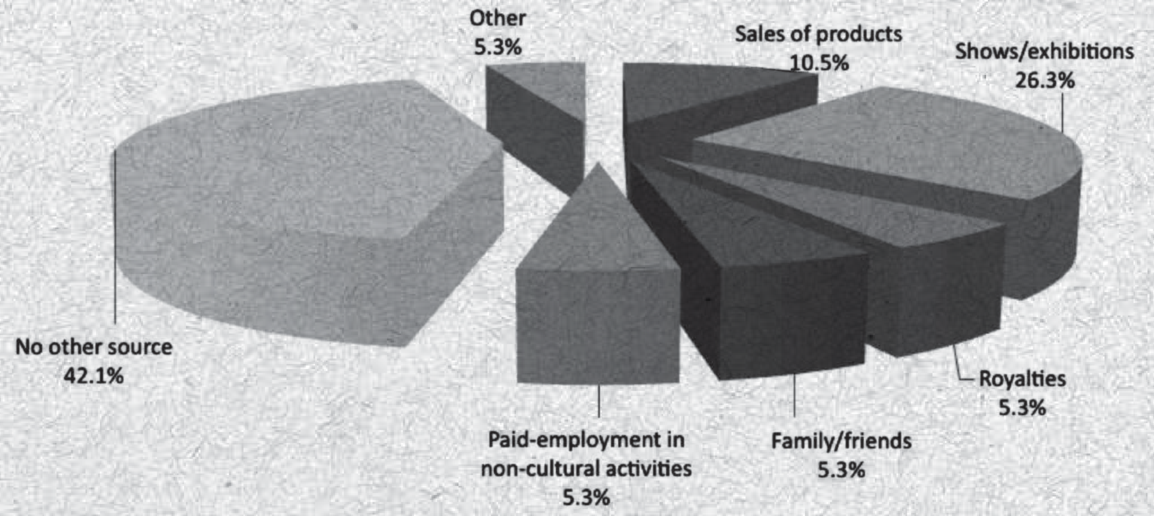
Donors were reported by 36 percent of the institutions in this domain as the main source of income for the year 2011 while slightly over a fifth (21.4 percent) earned incomes mostly from sales of products. The Government was the main source of income for 14 percent of the institutions. See Figure 5.5.16 below.

Figure 5.5.16: Percent Distribution of Institutions in the Design and Creative Services Domain by Main Source of Income, CSS Zimbabwe 2012



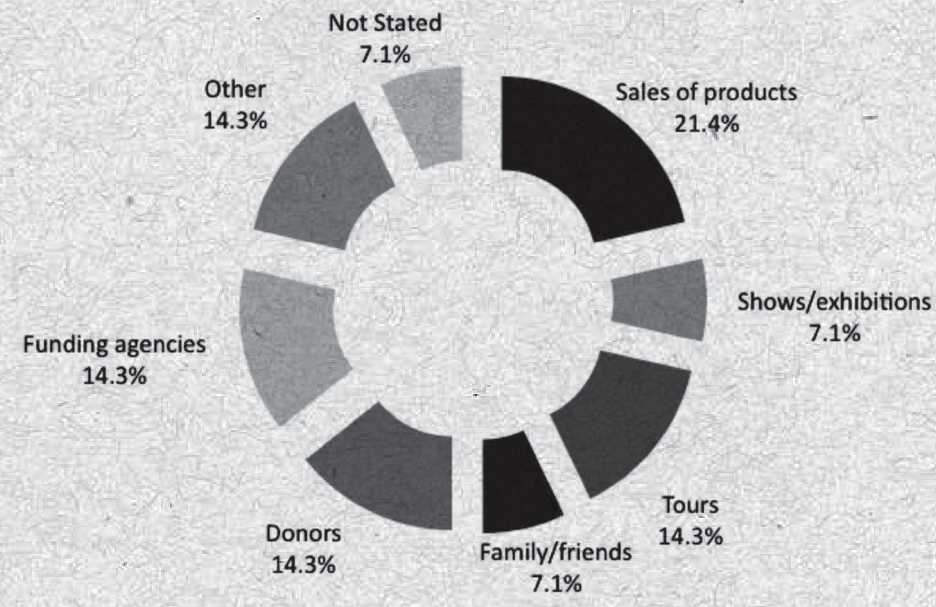
In this domain, 26 percent of individual artists reported "Shows and Exhibitions" as their secondary source of income while 11 percent cited sales of products.

Figure 5.5.17: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Secondary Source of Income, CSS Zimbabwe 2012



In the Design and Creative Services domain, 21 percent of the institutions reported sales of products as their secondary source of income and 14 percent each cited tours, donors and funding agencies. See Figure 5.5.18 below.

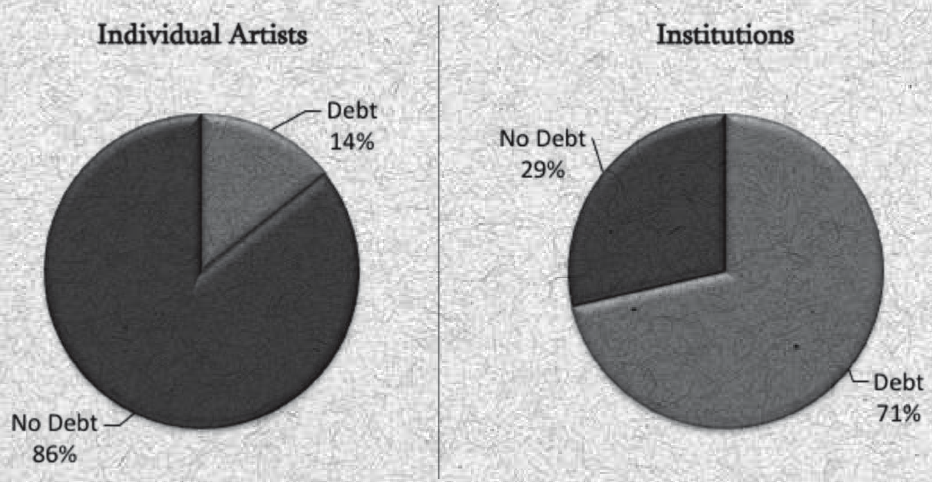
Figure 5.5.18: Percent Distribution of Institutions in the Design and Creative Services Domain by Secondary Source of Income, CSS Zimbabwe, 2012



5.5.5 DEBTS/LIABILITIES

Fourteen percent and 71 percent of the individual artists and institutions, respectively, in the Design and Creative Services domain indicated that they had incurred debts as shown in Figure 5.5.19 below.

Figure 5.5.19: Percent Distribution of Individual Artists and Institutions in the Design and Creative Services Domain by Whether or not they had Debts, CSS Zimbabwe, 2012



The estimates of the debts of individual artists in this domain are shown in Table 5.5.3 below.

Table 5.5.3: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Estimates of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

Estimate of Debts (USD)	Percent	Number
$1 - $99	33.3	1
$1 000 - $1 499	33.3	1
$2 000- $4 999	33.3	1
Total	**100**	**3**

Of the indebted institutions, 40 percent had incurred debts that ranged between US$20 000 to US$49 999 as shown in the Table 5.5.4 below.

Table 5.5.4: Percent Distribution of Institutions in the Design and Creative Services Domain by Estimate of Debt or Liabilities of the Business, CSS Zimbabwe, 2012

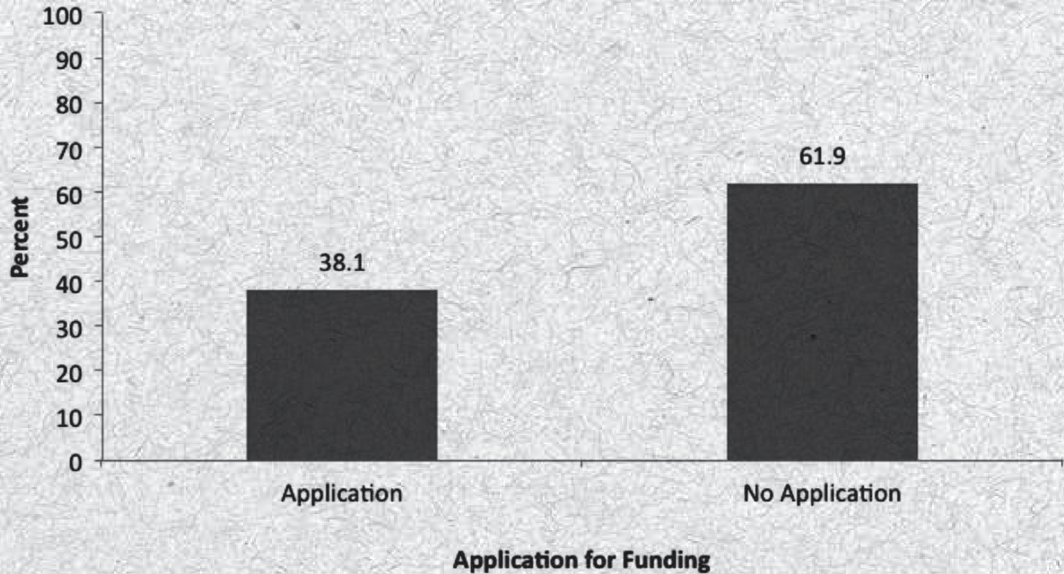
Estimate of Debts	Percent	Number
$500 - $999	10.0	1
$1 000- $4 999	10.0	1
$5 000 - $9 999	10.0	1
$15 000 - $19 999	10.0	1
$20 000 - $49 999	40.0	4
$50 000- $99 999	10.0	1
Above $100 000	10.0	1
Total	**100**	**10**

5.5.6 FUNDING AND MARKETING

Application for Funding

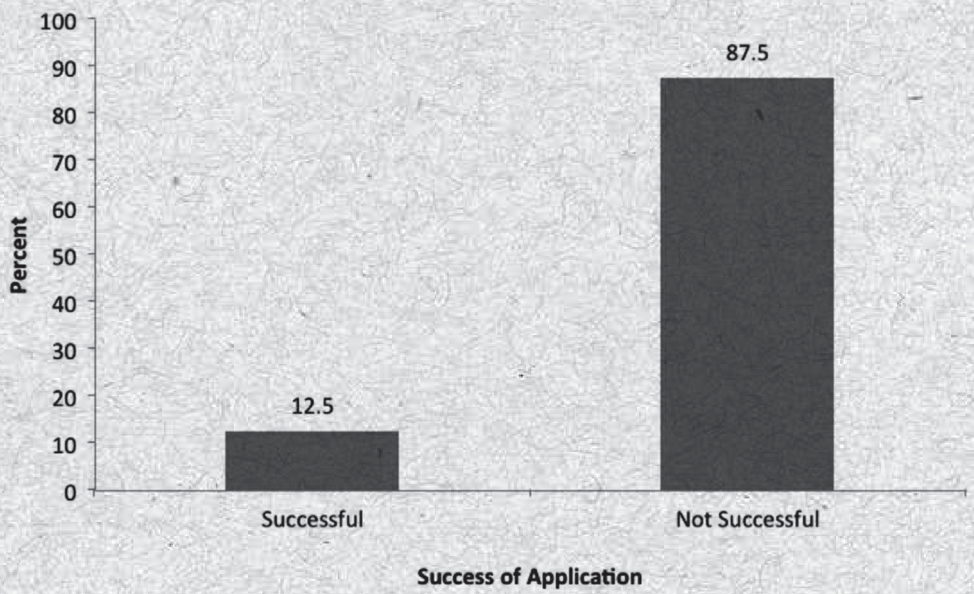
Individual artists in the cultural industry were asked if they had applied for funding over the two years preceding the survey. Thirty-eight percent of the individual artists in the Design and Creative Services domain indicated that they had applied for funding as shown in Figure 5.5.20 below.

Figure 5.5.20: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Application for Funding, CSS Zimbabwe, 2012



About 13 percent of the individual artists in this domain who had applied for funding indicated that they were successful. See Figure 5.5.21 below.

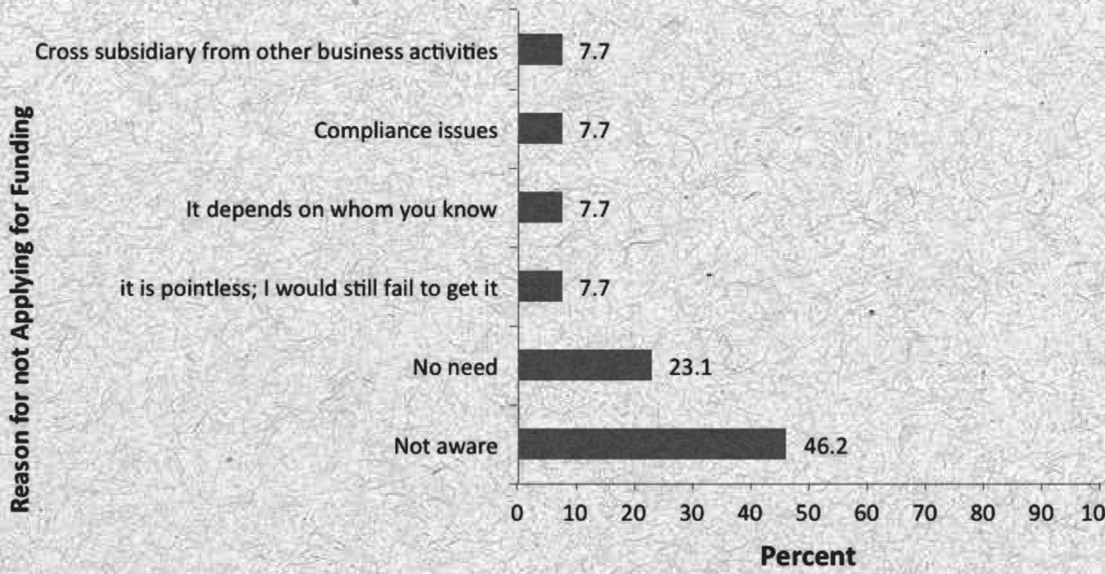
Figure 5.5.21: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Success of Application for Funding, CSS Zimbabwe, 2012



Main Reason for not Applying for Funding

All individual artists who indicated that they had not applied for funding over the two years preceding the survey were asked the major reason for not having done so. The distribution of reasons for not applying for funding is given in Figure 5.5.22 below. Forty-six percent of those in the Design and Creative Services domain indicated that they were "not aware" whilst 23 percent indicated "there was no need". Almost 8 percent each cited "cross-subsidies from other business", "compliance issues", "it depends with whom you know" and "it is pointless: I would still fail to get it".

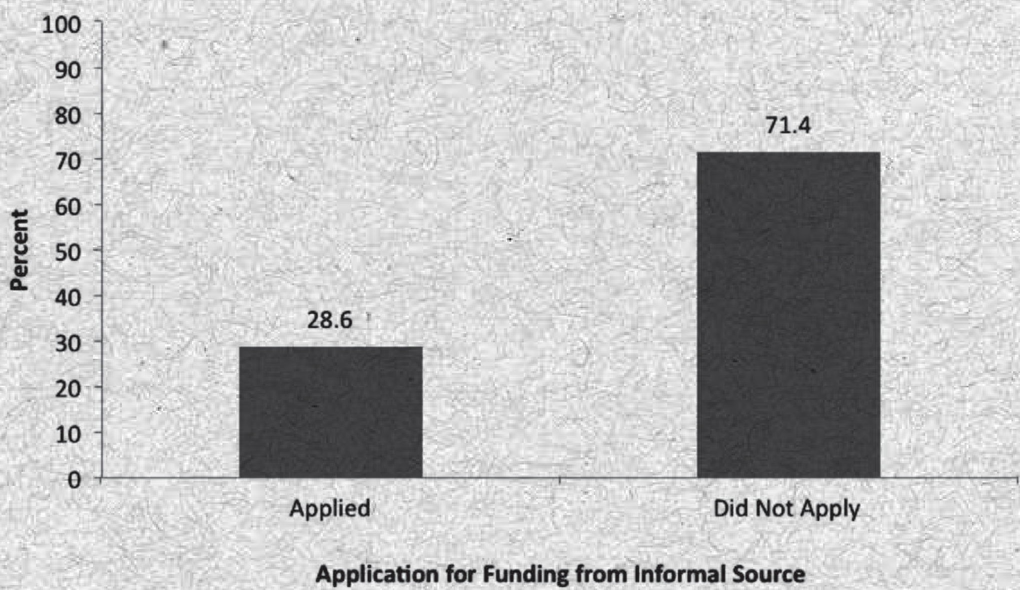
Figure 5.5.22: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Main Reason for not Applying for Funding, CSS Zimbabwe, 2012



Funding from Informal Sources

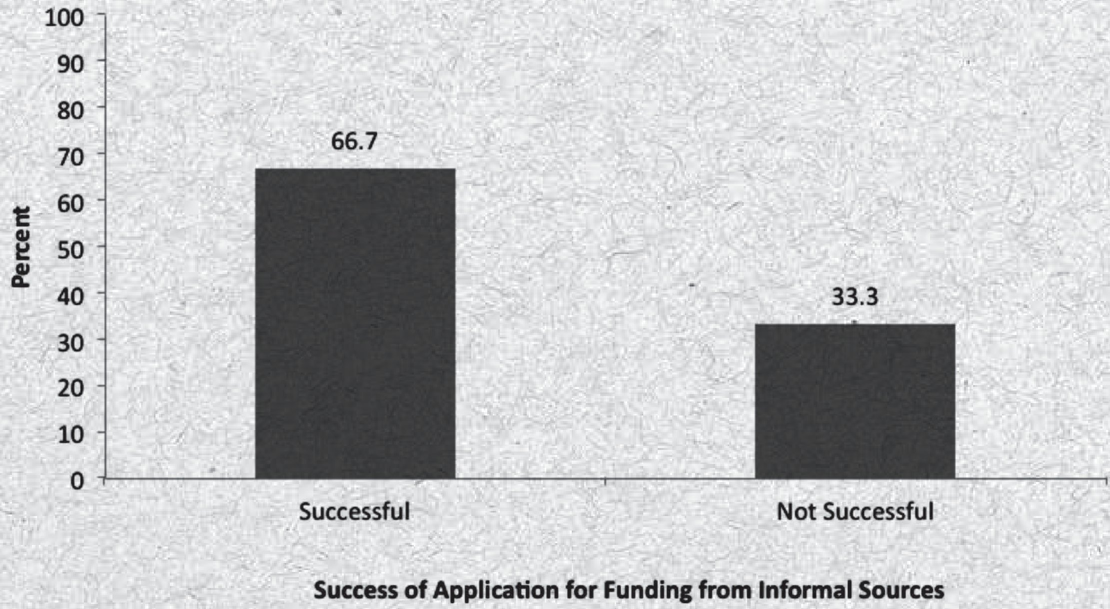
Almost 29 percent of the individual artists in the Design and Creative Services domain indicated that they approached informal sources such as unregistered money lenders, friends or relatives. See Figure 5.5.23 below.

Figure 5.5.23: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Application for Funding from Informal Sources, CSS Zimbabwe, 2012



Two-thirds (66.7 percent) of the individual artists in Design and Creative Services domain who approached informal sources were successful as shown in Figure 5.5.24 below.

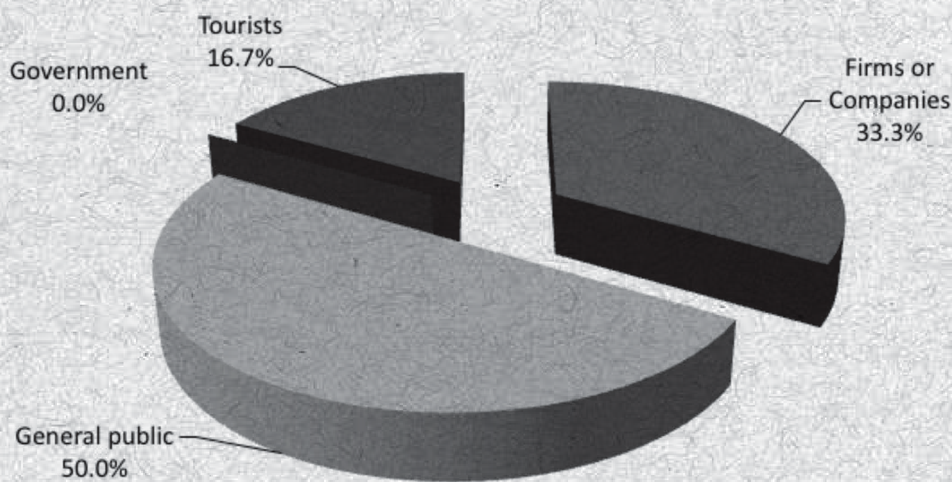
Figure 5.5.24: Percent Distribution of Individual Artists in the Design and Creative Services Domain by Success of Application for Funding from Informal Sources, CSS Zimbabwe, 2012



Marketing

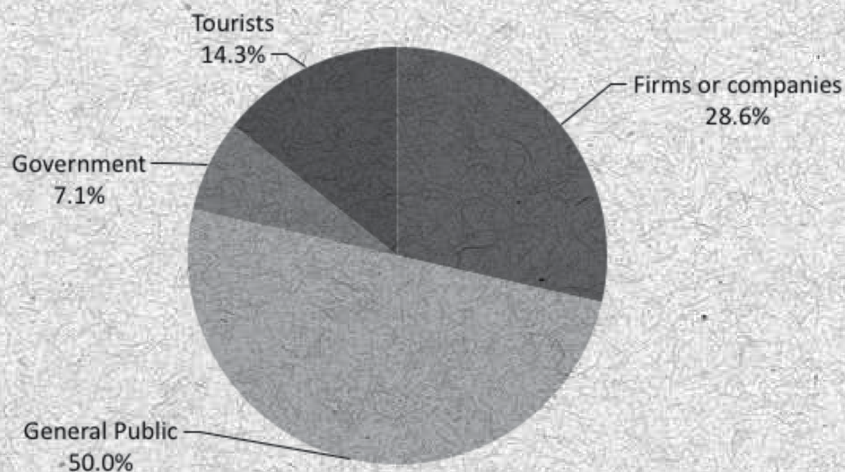
The distribution of markets for business products of individual artists in the Design and Creative Services domain is presented in Figure 5.5.25 below. The main markets for the artists were the general public (50.0 percent), companies (33.3 percent) and tourists (16.7 percent).

Figure 5.5.25: Distribution of Individual Artists in the Design and Creative Services Domain by Main Markets, CSS Zimbabwe, 2012



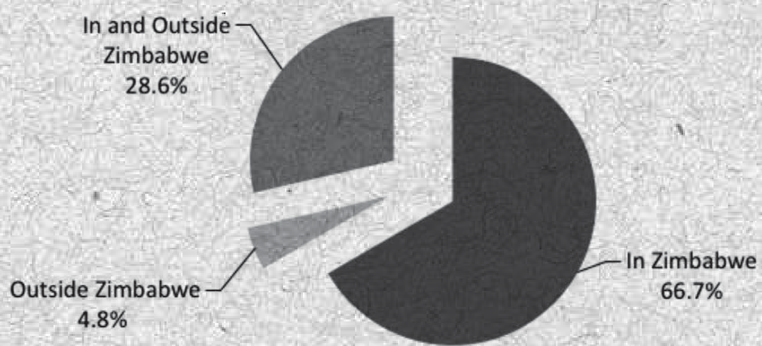
The main markets for institutions in the domain were the general public (50.0 percent), companies (28.6 percent) and tourists (14.3 percent) as shown in Figure 5.5.26 below.

Figure 5.5.26: Percent Distribution of Institutions in the Design and Creative Services Domain by Main Markets, CSS Zimbabwe, 2012



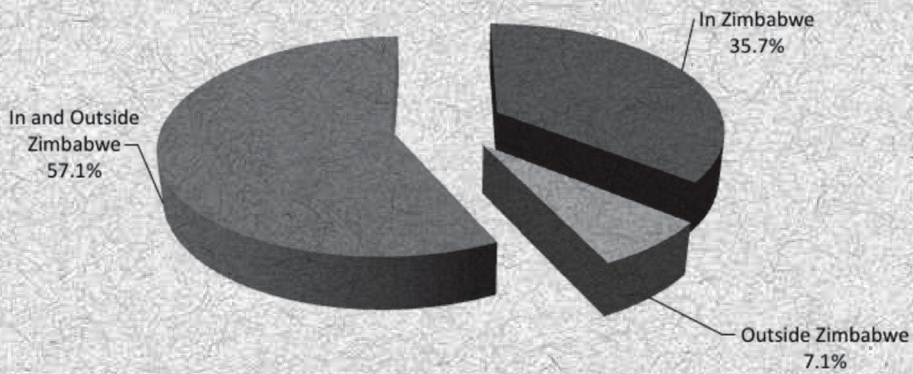
The local market was cited by two thirds (66.7 percent) of the individual artists in the Design and Creative Services domain as the main market for products as shown in Figure 5.5.27 below. Twenty-nine percent of the artists in this domain indicated that they sold their products in and outside the country while 5 percent sold their products exclusively out of the country.

Figure 5.5.27: Percent Distribution of Individual Artists in the Design and Creative Service Domain by Location of Markets, CSS Zimbabwe, 2012



Of the institutions in the Design and Creative Services domain, 57 percent indicated that they sold their products in and outside the country as shown in Figure 5.5.28 below. Thirty-six percent sold their products in Zimbabwe whilst 7 percent sold their products externally.

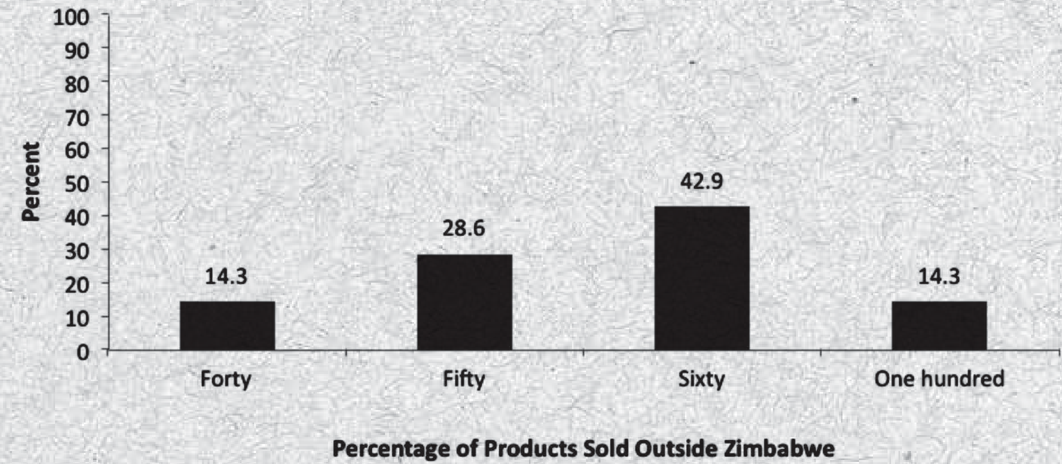
Figure 5.5.28: Percent Distribution of Institutions in the Design and Creative Services Domain by Location of Markets, CSS Zimbabwe, 2012



External Markets

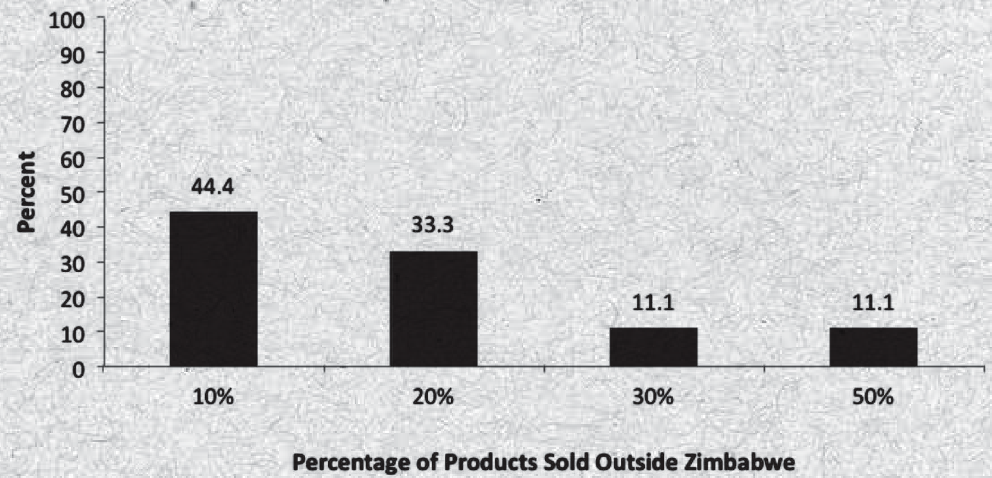
The breakdown of the percentage of products sold outside the country by individual artists in this domain is presented in Figure 5.5.29 below. Among the artists who sold products outside the country, 43 percent indicated that they sold sixty percent of their products externally. Twenty-nine percent of the artists sold fifty percent of their products outside the country.

Figure 5.5.29: Distribution of Individual Artists in the Design and Creative Services by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



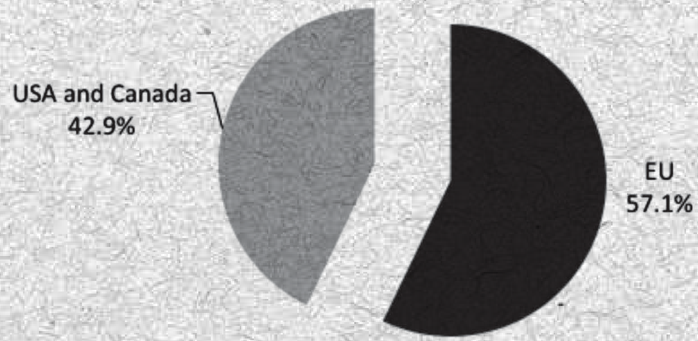
Among the institutions which sold products outside the country, 44 percent indicated that they had sold ten percent while 33 percent had sold twenty percent. Eleven percent each had sold thirty percent and fifty percent of their products as shown in Figure 5.5.30.

Figure 5.5.30: Percent Distribution of Institutions in the Design and Creative Services Domain by Percentage of Products Sold Outside Zimbabwe, CSS Zimbabwe, 2012



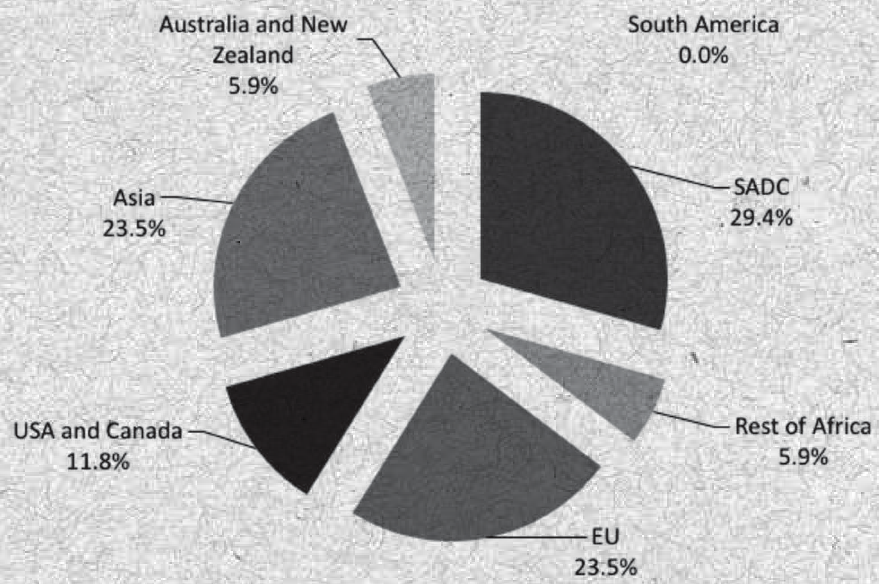
The external markets for individual artists in the Design and Creative Services domain were the EU (57.1 percent), and the USA and Canada (42.9 percent) as shown in Figure 5.5.31 below.

Figure 5.5.31: Percent Distribution of Individual Artists in the Design and Creative Services by External Markets, CSS Zimbabwe, 2012



The major external markets reported by institutions in the Design and Creative Services domain were the SADC (29.4 percent), Asia (23.5 percent) and the EU (23.5 percent) as shown in Figure 5.5.32 below.

Figure 5.5.32: Percent Distribution of Institutions in the Design and Creative Services Domain by External Markets, CSS Zimbabwe, 2012



5.6 CONCLUSION

Generally, there is a similar pattern across all the domains concerning the types of contracts for employees. For both individual artists and institutions, most of their employees had open-ended contracts. Instrument/ tools/equipment hire or purchase was the highest cost for individual artists in the Performance and Celebrations and the Film, Audio-Visual and Interactive Media domains whilst for the remaining domains it was operating costs. Shows were the major source of income for most of the artists in the Performance and Celebrations domain whilst sales of products was the main source in the Visual Arts and Crafts and the Literary Arts and Publishing domains. Donors were a major source of income for artists in the Film, Audio-Visual and Interactive Media and the Design and Creative Services domains. Unlike in other domains, almost half of the artists in the Visual Arts and Crafts domain sold their products in and outside Zimbabwe.

CHAPTER 6: OBSERVATIONS AND RECOMMENDATIONS

The Cultural Statistics Survey results give an indication of the general situation in the cultural industry. From the results and challenges faced in conducting the survey, the following were the observations and their recommendations.

Observations	Recommendations
1. The survey faced challenges of outdated information from the registers and directory. The lists contained details of deceased artists, persons who had left the industry and outdated contact details.	1a. All the regulatory institutions such as NACZ, ZIMURA, NGZ, ZWA, should constantly update their registers and directories of the artists. 1b.Registration processes should be strengthened in the Cultural and Creative Industry.
2. It was noted that during the survey, a significant number of artists postponed the interviews indefinitely and some refused.	2. The regulatory authorities within the industry should educate their membership on the benefits of both internal and external research to their industry.
3. There is a lack of clear regulatory policy framework within the industry.	3. There is an urgent need for a clear and supportive policy framework.
4. The findings, their limited scope notwithstanding, can be used as pointers to the performance of the industry within the national economy.	4. Conduct a survey of a similar nature at a national level.
5. It was noted that the 2009 UNESCO FCS has various limitations at implementation level.	5. UNESCO FCS needs broadening in order to embrace a more inclusive regime of downstream economic activities.
6. Lack of knowledge of the benefits that can be derived from the UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions.	6. The Government of Zimbabwe is recommended to put in place measures to generate greater awareness of the content and import of the UNESCO 2005 Convention.

APPENDICES

APPENDIX 1: INSTITUTIONS AND PERSONS WHO PARTICIPATED IN THE SURVEY

ZIMSTAT

Project Head – Dzinotizei Mutasa

Project Director - Mungate Taizivei

Survey Coordinator - Chigiji Handrick

Culture Fund of Zimbabwe Trust

Programme Head - Mpfunya Farai

Programme Officer - Muvezwa Chipo

Technical Committee Members by Institution

Ministry of Education, Sport, Arts and Culture – Chair

Damasane Paul Bayethe, Manuhwa Charity, Viriri Priscilla

Zimbabwe Music Rights Association (ZIMURA)

Chirume Roseline

University of Zimbabwe

Mberi Nhira Edgar

Amagugu Arts

Pathisa Nyathi

Melo - Rhythm Instruments

Timbe Chris

Zimbabwe Writers Association

Mungoshi David S

Culture Fund of Zimbabwe Trust

Muvezwa Chipo

Zimbabwe National Statistics Agency (ZIMSTAT)

Mungate Taizivei, Chigiji Handrick, Marima Evelyn, Mwadiwa Tinashe Enock, Ziswa Lovemore Sungano, Matangira Tidings, Mhlanga Ronald, Takavarasha James Gombe Africa, Viriri Manase , Bote Munyaradzi, Mutungama Roseline, Mahere Lloyd TM

Report Authors

Chigiji Handrick, Marima Evelyn, Mwadiwa Tinashe Enock, Ziswa Lovemore Sungano, Matangira Tidings, Mhlanga Ronald

Overall Field Supervisors

Mungate Taizivei, Manyame Obert, Damasane Paul Bayethe, Muvezwa Chipo, Chigiji Handrick

Field Teams

Harare Team

Mungoshi David S	-	Supervisor
Mhlanga Ronald	-	Supervisor
Mazhiri Zuze	-	Team Leader
Nyamakwenje Silvia	-	Enumerator
Nhapi Alois	-	Enumerator
Mafuta Melody	-	Enumerator
Jack Fungai	-	Enumerator
Dende Natalie	-	Enumerator
Kwinjo Itai	-	Driver

Chitungwiza Team

Manuhwa Charity	-	Supervisor
Timbe Chris	-	Supervisor
Matangira Tidings	-	Supervisor
Hambayi Naison	-	Team Leader
Chibika Sharon	-	Enumerator
Ngedzo Innocent	-	Enumerator
Mwatse Cyprian	-	Enumerator
Manhera Sekai	-	Enumerator
Mwabaya Nicolety	-	Enumerator
Chigumadzi Leymen	-	Driver

Norton Team

Viriri Precillah	-	Supervisor
Ziswa Lovemore S	-	Supervisor
Bote Munyaradzi	-	Supervisor
Mumera Amos	-	Team Leader
Chawanda Emma	-	Enumerator
Machingura Emilda	-	Enumerator
Chitsaka Molly	-	Enumerator
Makoni Caroline	-	Enumerator
Chitopo Linda	-	Enumerator
Tongogara Clever M	-	Driver

Epworth Team

Marima Evelyn	-	Supervisor
Takavarasha James GA	-	Supervisor
Viriri Manase	-	Supervisor
Jonasi Josephine	-	Team Leader
Munapo Michel	-	Enumerator
Jaravaza Nhamo	-	Enumerator
Basvi Evelyn	-	Enumerator
Gambiza Maxwell	-	Enumerator
Kasheshe Grace	-	Enumerator
Mutisi Wilson	-	Driver

Ruwa Team

Mberi Nhira Edgar	-	Supervisor
Mwadiwa Tinashe E	-	Supervisor
Chirume Roseline	-	Supervisor
Mafunga Peter	-	Team Leader
Gowa Miriam	-	Enumerator
Mutetwa Estery	-	Enumerator
Rwarinda Jemison	-	Enumerator
Chawaremera Delia	-	Enumerator
Nyama Offin	-	Enumerator
Jongwe Godfrey	-	Driver

Data Processing Supervisor
Majoni Tigere

System Developers
Mutungama Roseline, Mahere Lloyd TM

Data Entry Online Editor/Supervisor
Chigiji Handrick, Manuhwa Charity

Data Editing and Coding
Mazhiri Zuze, Hambayi Naison, Nhapi Alois, Mumera Amos, Mwatse Cyprian, Nyama Offin

Data Entry
Basvi Evelyn, Mautsa Agnes, Rusere Stephen, Mumbamarwo Chishamiso, Kulucheta Vimbai, Machona Caroline, Mukonzi Brenda, Madzokere Amandah, Murwira Trymore, Ngedzo Innocent, Muchineripi Hazvinei, Murakata Magreth, Chinodakufa Beauty, Mhloro Sithabile, Muchineripi Hazvinei, Nkomo Beauty, Nyama Ofini, Rumumba Sibongile,

Questionnaire and Form Dispatch and Recovery
Sigauke Cephas, Kunaka Deadlock

Supervision Driver
Sithole Tawanda

APPENDIX 2: QUESTIONNAIRES

a.INDIVIDUAL QUESTIONNAIRE

CULTURAL STATISTICS SURVEY (CSS) 2012

Measuring the economic contribution of Zimbabwe's cultural industries

QUESTIONNAIRE

AREA NAME: | | | | | | | | | | | | | | |

AREA NUMBER: | 0 | |

ARTIST/BAND/GROUP NUMBER: | 1 | | | |

CONFIDENTIAL

Good ………….! My name is …………………………. and I am here on behalf of the Culture Fund and the Zimbabwe National Statistics Agency (ZIMSTAT). We are collecting information about the contribution of cultural industries in the economy. This information will be used to influence policy and grow the cultural industry. The interview will take about 20 minutes. All the information we obtain from you will remain strictly confidential. Can we start now? Thank you.

Kwaziwai……………..! Zita rangu ndi………………….Ndauya ndakamirira Culture Fund uye bazi rehurumende re Zimbabwe National Statistics Agency (ZIMSTAT). Tiri kuunganidza ruzivo maererano nerutsigiro rwuri kuitwa nemabasa etsika nemagariro kuhupfumi hwenyika. Ruzivo rwatichaunganidza ruchashandiswa pakuumba zvisungo nekuvandudza mabasa etsika nemagariro. Hurukuro yedu ingangotora chikamu chemaminitsi angasvika makumi maviri (20 minutes). Ruzivo rwatichawana rwuchachengetedzwa chose. Tingatange hedu hurukuro? Tinotenda

IF PERMISSION IS GIVEN, BEGIN THE INTERVIEW.

IDENTIFICATION PANEL	ID
1. AREA NAME ______ AREA NUMBER: 0	2. BAND/GROUP/ARTIST NAME:
3. INTERVIEWER NAME ______ NUMBER:	4. TEAM LEADER NAME ______ NUMBER:
5. DAY/MONTH/YEAR OF INTERVIEW	_ _ / _ _ / 2 0 1 2
6. NAME OF RESPONDENT: ______	
7. BAND/GROUP/ARTIST MAIN BUSINESS ADDRESS ______	

8. WHERE DO YOU USUALLY OPERATE FROM?

MABASA ENYU MUNOWANZOAITIRA PAI?

FOOTPATH, STREET OR OPEN SPACE……….	1
A MARKET…………………………………	2
IN (NAME'S) HOUSEHOLD…………………	3
IN SOMEONE ELSE'S HOUSEHOLD…………	4
BUILDING/FIXED LOCATION………………	5
NO FIXED LOCATION……………………	6
OTHER (specify) ______	96

9. RESULT OF INTERVIEW:

COMPLETE…………………………	1
NOT AVAILABLE………………………	2
REFUSED……………………………	3
NOT FOUND…………………………	4
INCOMPLETE…………………………	5
OTHER (specify)……………………	96

INTERVIEWER/SUPERVISOR NOTES: *USE THIS SPACE TO RECORD NOTES ABOUT THE INTERVIEW WITH THIS ORGANIZATION, SUCH AS CALL-BACK TIMES, INCOMPLETE INDIVIDUAL INTERVIEW FORMS, NUMBER OF ATTEMPTS TO RE-VISIT, ETC*

10.A. SUPERVISOR NAME: ______

10.B. EDITOR/CODER NAME: ______

10.C. DATA ENTRY CLERK: ______

MODULE 1:GENERAL INFORMATION		GI	
11. What is your registration and/or licensing status? Mabasa enyu amunoita aya akanyoreswa (registered) here uye mune rezinesi here?	Registered only……………………… Licensed only……………………….. Registered and Licensed………….. Neither Registered nor Licensed…… Other (*specify*)_______________	1 2 3 4 96	13
12. With whom are you registered and/or licensed? *(Circle all mentioned)* Mungatiudzewo here sangano ramakanyoresa naro uye mune rezinesi rerudzii? *(Circle all mentioned)*	Registrar of companies…………….. Registrar of Deeds…………………... ZIMRA……………………………. Zimbabwe Music Rights Association (ZIMURA)……………. National Arts Council of Zimbabwe (NACZ)………………… Local Authority…………………… Other (*specify*)_______________	A B C D E F X	14
13. What are the reasons for not registering and/or licensing? *(Circle all mentioned)* Ndezvipi zvikonzero zvakaita kuti musanyorese mabasa enyu kana kuti musaite rezinesi? *(Circle all mentioned)*	It is a talent……………………….. It is traditional…………………….. Do not know how or where to register……………………………. Cannot afford the costs…………… It is not necessary………………… Not able to meet requirements……. Other (*specify*)_______________	A B C D E F X	
14. Are you a member of any arts industry body or association? Muri nhengo yesangano rakamirira vanhu vanoita zvetsika nemagariro here?	Yes………………………………. No………………………………...	1 2	
15. Which of the following categories are you under? (Private, private households, co-operatives, NGOs?) Pane mapoka anotevera, imi muri muboka ripi? (Puraivheti kambani, puraivheti yemhuri, koparetivhi, masangano akazvimirira oga)	Private……………………………. Private Households ………………. Co-operative……………………... NGO……………………………… Other (*specify*)_______________	1 2 3 4 96	
16. What kind of cultural business are you engaged in? (Give description in two or more words). Nderipi bhizinesi ramunoita mune zvetsika namagariro? (Give description in two or more words).	______________________________ ______________________________		
17. What are your major business activities? *(circle all mentioned)* Ndeapi mabasa amunonyanya kuita mubhizinesi renyu? *(circle all mentioned)*	Performance and Celebrations……… Visual Arts……………………….. Crafts……………………………. Literary Arts & Publishing………….. Film, Audio-Visual and Interactive Media……………………………….. Design and Creative Services……….. Tourism (Related domain)………….. Sport and Recreation (Related domain)…………………………... Other (*specify*)_______________	A B C D E F G H X	
18. How long have you been operating? Mave nenguva yakadii muchiita mabasa aya?	Less than 1 year……………………… 1-5 years…………………………… 6-10 years…………………………… 11-20 years………………………… More than 20 years……………………	1 2 3 4 5	
19. Who owns the business?	Self………………………………...	1	

Ndiani muridzi webhizinesi iri?	Partnership………………………… Company………………………….. Cooperative……………………….. Association……………………….. NGO……………………………… Other (*specify*)_______________	2 3 4 5 6 96	
20. What is the nationality of the principal/majority owner of the business? Muridzi webhizinesi iri chizvarwa chenyika ipi?	Zimbabwean…………………….. Other African…………………….. Asian……………………………... European………………………… Not known………………………. Other (*specify*)_______________	1 2 3 4 5 96	
21. What do you do on a day to day basis? *(circle all mentioned)* Chii chaizvo chamunoita mumabasa enyu zuva nezuva? (circle all mentioned)	Agent ……………………………. Producer ………………………… Creator/artist/crafter……………... Writer …………………………… Composer………………………… Supplier ………………………….. Education/training……………….. Venues owner/exhibitor………... Facilities manager………………... Retailer ………………………….. Distributor……………………….. Design…………………………… Other (specify) _____________	A B C D E F G H I J K L X	
22. Do you do other things besides 'creative' work? Mune mamwe mabasa amunoita here kunze kwemabasa anobva muunyanzvi hwenyu mune zvetsika namagariro?	Yes ……………………………….... No………………………… …….	1 2 →	25
23. What other things do you do besides creative work? Ndeapi mamwe mabasa aya?	______________________________		
24. Why are you involved in other activities? *(circle all mentioned)* Sei muchiita mamwe mabasa aya asineyi neunyanzvi hwenyu mune zvetsika nemagariro? *(circle all mentioned)*	Cross subsidy……………………. Market too small………………… Risk reduction/diversification…… Business expansion…………….. Other (specify)_______________	A B C D X	
25. What is the one main obstacle to your creative operations in <u>each</u> of the following categories? 1. Cost 2. Regulatory Framework 3. Access 4. Market Conditions 5. Socio-economic conditions 6. Perception 7. Other	**1. Cost** …………………………… Telecommunications……………...... Electricity…………………………… Transportation ……………………… Finance …………………………….. Labour…………………………… …. Raw materials…………………....... Instruments/Equipment/Tools……….. Not an obstacle ………………....... Other (specify)_______________ **2. Regulatory Framework**……… ZIMRA compliance………………… Customs and trade regulations……….	**A** 11 12 13 14 15 16 17 18 96 **B** 21 22	

NB:GO BY CATEGORY WHEN ASKING *(choose **one** from **each** category)*	Labour regulations……………….……	23	
	Business licensing and permits………..	24	
	Lack of industry promotion…………...	25	
	Not an obstacle ……………….….	26	
	Other (specify) ________________	96	
	3. Access…………………………….	C	
	Telecommunications………………….	31	
	Electricity …………………………….	32	
	Transportation ………………………..	33	
	Finance ……………………………….	34	
	Labour……………………………. ….	35	
	Raw materials………………………….	36	
	Instruments/Equipment/Tools………..	37	
	Not an obstacle ………………..	38	
Pane chimwe nechimwe chezvinotevera, chii chamungati ndicho chinonyanya kukukanganisai pamashandiro emabasa enyu? 1. **Mari inodikanwa kuti muite basa renyu** 2. **Mitemo inosunga mashandiro enyu** 3. **Mikana yekuwana zvakasiyana- siyana zvamunoshandisa** 4. **Maketi** 5. **Mamiriro akaita zvinhu munyika** 6. **Maonerwo amunoitwa sevanhu vari mubasa rakaita serenyu iri** *(choose **one** from **each** category)*	Other (specify) ________________	96	
	4. Market conditions…………….	D	
	Tax rates………………………….……	41	
	Skilled workforce……………………..	42	
	Practices of competitors……….…….	43	
	Exchange rate………………………….	44	
	Not an obstacle …………………..	45	
	Other (specify) ________________	96	
	5. Socio-economic conditions….	E	
	Substance abuse………………………	51	
	HIV and AIDS………………………	52	
	Corruption……………………………	53	
	Crime, theft and disorder……………..	54	
	Intellectual infringement (piracy…)….	55	
	Not an obstacle …….……...........	56	
	Other (specify) ________________	96	
	6. Perception…………………….	F	
	Public……………………………..….	61	
	Policy makers…………………………	62	
	Media………………………………….	63	
	Family…………………………………	64	
	Not an obstacle……. …………….	65	
	Other (specify) ________________	96	
	7. Other specify ______________	96	

26. What do you see as the main need for the development of your business? Chii chamunofunga kuti ndicho chikuru chingaite kuti mubudidirire mumabasa enyu?	Training………………………………… 1 Help with strategy and business planning……………………………... 2 Help with developing new ideas for cash generations……………………. 3 Help with improving process and efficiency……………………………. 4 Help with marketing ………………... 5 Help obtaining funding……………. 6 Help with international expansion…………………………… 7 Help with ICT usage (marketing, distribution)………………………… 8 Infrastructure (venue, shelter etc)…... 9 Other (*specify*) ______________ 96	
27. Are you aware of any government policies and regulations that support the culture sector? Mune ruzivo here pamusoro pemitemo nezvisungo zvehurumunde zvinotsigira zvinotsigira mabasa ezvetsika namagariro?	Yes……………………………….. 1 No ……………………………… 2	

MODULE 2: EMPLOYMENT	E

28. What was the number of employees in your business as at 30 September 2012 by employment category and sex?

Bhizinesi renyu raive nevashandi vangani pakupera kwaSeptember 2012?
Taurai uwandu hwavo muchitaura kuti vanhukadzi vangani uye vanhurume vangani. Mungatiudzewo zvekare kuti vari papemenendi, uye vari patembarari vangani.

Type of Employee	Number		
	Males	Females	Total
Full-time			
Part-time			
Total			

29. Has the total number of employees increased, decreased or remained the same in the last 12 months? Uwandu hwevashandi venyu hwakawedzera here, hwakaderera here kana kuti hwakaramba hwakadaro mumwedzi gumi nemiviri yapfuura?	No change………………………… 1 Decreased………………………... 2 Increased…………………………. 3	
30. What is the average contract length of your employees? Vashandi vazhinji venyu vari pakondirakiti yakareba zvakadii?	Open-ended…………………………......... 1 Other(specify) [ ][ ] 96	

31. What is the distribution of employees by income ranges (per month) as at 30 September 2012:

a. Part-time
b. Full-time

Vashandi venyu vanotambira mari dzakaita sei? Shandisai mari dzavakatambira kupera kwemwedzi waSeptember 2012.

a. Part-time
b. Full-time

Monthly Cash Income	Number of Employees	
	Part-time	Full-time
$1 -$150		
$151-$250		
$251- $350		
$351 - $450		
$451-$550		
$551-$650		
$651-$750		
$751-$1 000		
$1 001-$1 500		
$1 501-$3 000		
above $3 000		
Total		

32. Has the average income of employees increased, decreased, or not changed in the last 12 months?

Mari dzavanotambira dzakawedzera here, dzakaderera here kana kuti dzakaramba dzakadaro mumwedzi gumi nemiviri yapfuura?

No change………………………………..……. 1
Decreased…………………………..………. 2
Increased……….………………………….…… 3
Fluctuated…………………………….……… 4

33. Are there any people with disabilities in your business?

(*If none record "00"*)

Mune vanhu vane hurema here vamunoshanda navo mubhizinesi renyu?

(If none record "00")

Males ☐☐

Females ☐☐

Total ☐☐

34. Are the majority of your employees members of a culture association?

Vazhinji vevashandi venyu inhengo dzesangano rinomiririra mabasa enyu aya here?

Yes……………………………… 1
No…………………………….…. 2
Don't know……………………… 88

MODULE 3: EDUCATION AND TRAINING — ET

35. Did the owner/ principal owner of the business receive any form of training?

Muridzi webhizinesi akadzidzira basa iri here?

Yes………………………………………….. 1
No…………………………………….……… 2 → 38
Don't know……………………………… 88 → 38

36. Was the training received formal or informal?

Muzvina bhizinesi akadzidzira pabasa here kana kuti akariendera kuchikoro?

Formal……………………………….…...... 1
Informal……………………………….….. 2
Both…………………………….………… 3

37. What is/are the area(s) of training? *(circle all mentioned)* Akadzidzira chii muzvidzidzo izvi? *(circle all mentioned)*	Technical Skills/Apprenticeship…………... Financial Management…………………… Human Resources Management…………… Business Management…………………… Other Specify____________________	a b c d x	
38. What is the highest level of education of the owner/principal owner of your business? Muridzi webhizinesi akasvika padanho ripi muzvidzidzo zvake?	Primary (1 to 7)………………………….. Secondary (1 to 4)……………………….. A' Level (5 and 6)……………………….. Certificate after primary…………………….. Certificate after secondary/'O' Level……… Certificate after 'A' Level……………… Diploma after Primary…………………...... Diploma after Secondary/'O' Level……… Diploma after 'A' Level………………….. University degree ………………………... Post –graduate degree………………....... Other (specify)__________________ None……………………………………….	1 2 3 4 5 6 7 8 9 10 11 96 98	
MODULE 4: FINANCE (INCOME AND EXPENDITURE)	**F**		
39. What was your main source of income in year 2011? Chii chakanyanya kukupai mari mugore ra2011?	Direct sales of products (CDs, artifacts)…… Shows/exhibitions………………………… Sessions……………………………........ Royalties………………………………… Tours…………………………………….. Family/Friends………………………….. Subletting space ………………………… Corporate sponsorship………………..... Government …………………………….. Funding agencies………..……………… Employment in non-cultural activities.......... Not in arts business in 2011…………….. Other (specify)__________________	1 2 3 4 5 6 7 8 9 10 11 12 96	 43
40. What was your next main source of income in year 2011? *(choose one)* Chii chimwe chinotevera chakanyanya kukupai mari mugore ra2011?	Direct sales of product (CDs, artifacts)……. Shows/exhibitions………………………… Sessions……………………………........ Royalties………………………………… Tours…………………………………….. Family/Friends………………………….. Subletting space ………………………… Corporate sponsorship…...……………... Government …………………………….. Funding agency ………………………… Employment in non-cultural activities…….. No other source…………………………… Other (specify)__________________	1 2 3 4 5 6 7 8 9 10 11 12 96	

41. On average, how much did you make monthly, from cultural activities, in year 2011 (monthly gross revenue)? Mungati maiwana mari yakadii pamwedzi woga woga mugore ra2011 kubva mumabasa etsika nema gariro?	Monthly Average year 2011 $	
42. What was your business's average monthly cost/expenditure for the year 2011? Mari yamaishandisa mubhizinesi renyu pamwedzi woga woga mugore ra2011 imarii?	Monthly Average year 2011 $	
43. In your business, what do you spend most of your money on? Mubhizinesi renyu chamungati chinonyanya kuburitsa mari zvakanyanya ndechipi?	Direct raw material cost…………………… 1 Operating cost (rent, transport, electricity, interest charges)………………………….. 2 Wages and salaries and related costs (allowances, bonuses)..…………………….. 3 Instruments/tools/equipment purchase/hire cost……………………………………….. 4 Other specify____________________ 96	
44. What is your next highest cost? Chimwezve chinonyanya kuburitsa mari zvakanyanya mubhizinesi renyu ndechipi?	Direct raw material cost…………………… 1 Operating cost (rent, transport, electricity, interest charges)………………………….. 2 Wages and salaries and related costs (allowance, bonuses..)…………………….. 3 Instruments/tools/equipment purchase/hire cost……………………………………….. 4 No other cost……………………………. 5 Other specify____________________ 96	
45. What is the value of your business assets (machinery/tools/equipment)? Muri matengesa michina yenyu nezvimwe zvamunoshandisa pabasa, mungawane marii?	Assets Value $	
46. Does your business have any debt /liabilities? Bhizinesi renyu rine zvikwereti here?	Yes……………………………………….. 1 No……………………………………….. 2	Next Module
47. Could you give an estimate of the total debt/liability? Titaurireiwo kuti zvikwereti zvebhizinesi renyu zvingasvika marii?	$1 - $99……………………………….. 1 $100 - $199…………………………….. 2 $200 - $499……………………………… 3 $500 - $999……………………………… 4 $1 000 - $1 499………………………….. 5 $1 500 - $1 999………………………….. 6 $2 000 - $4 999………………………….. 7 $5 000 - $9 999………………………….. 8 $10 000 - $14 999………………………. 9 $15 000 - $19 999……………………….. 10 Above $20 000………………………….. 11	

MODULE 5 : FUNDING AND MARKETING	FM		
48. Have you applied for funding over the last two years? Makambonyorerawo kuti muwaniswe mari yekushandisa mubhizinesi renyu mumakore maviri adarika here?	Yes…………………………………………. No………………………………………….	1 2	 → 52
49. Where did you apply the funding from? *(circle all mentioned)* Makanyorera muchitsvaga mari kupi? *(circle all mentioned)*	Government…………………………….. Funding agencies……………………….. Banks …………………………………….. Other corporates………………………….. Other specify____________________	A B C D X	
50. Did you get any funding over the last two years? Pane mari yamakawana here pane kwose kwamakanyorera pamakore maviri apfuura?	Yes…………………………………………. No………………………………………….	1 2	 → 53
51. Where did you get the funding from? *(circle all mentioned)* Makawana mari kupi? *(circle all mentioned)*	Government…………………………….. Funding Agencies……………………….. Banks …………………………………….. Other Corporate ………………………….. Other specify____________________	A B C D X	→ 53
52. What was the major reason for not applying for funding over the last two years? Chii chakanyanya kuita kuti musanyorere mari dzinokwanisa kukubatsirai mubhizinesi renyu mumakore maviri adarika?	No experience in writing proposals……. It is pointless; I would still fail to get it… It depends on whom you know ……….. Compliance issues …………………….. No collateral…………………………….. No need …………………………………. Cross subsidy from other business activities……………………………….. Not aware………………………………. Other specify____________________	1 2 3 4 5 6 7 8 96	
53. In the last two years, did you try to get money from an informal source such as an unregistered money lender, friend or relative? Mumakore maviri adarika aya makamboedza kukwereta mari here kune vamwe vanhu, dzingave shamwari kana hama asi vasiri mabhangi kana makambani ane basa rekupa zvikwereti.	Yes…………………………………………. No………………………………………….	1 2	 → 55
54. Did you receive money from this informal source? Makawana mari here?	Yes…………………………………………. No………………………………………….	1 2	

55. What is the main market for your business products (goods or services)? Ndevapi vanonyanya kutenga zvinhu zvenyu kana kuti vamunoitira mabasa?	Firms or Companies…………………… 1 General public –individual artists…………… 2 Public sector – government …………… 3 Tourists………………………………… 4 Other (specify) ________________ 96	
56. Where do you sell your products (goods or services)? Zvinhu zvenyu kana mabasa enyu munotengesera munyika muno here kana kunze kwenyika?	Locally (In Zimbabwe)………………… 1 Abroad (Outside Zimbabwe)………… 2 Both…………………………………… 3	→ go to next module
57. What percentage of your products (goods or services) do you think you sell outside Zimbabwe? Zvingava zvikamu zvingani kubva muzana zvezvinhu zvamunotengesera kunze kweZimbabwe kana mabasa amunoitira vekunze kwenyika?	☐☐☐ percent	
58. To which countries do you sell your products (goods or services)? Ndedzipi nyika dzamunotengesera zvinhu zvenyu kana kuitira mamwe mabasa enyu?	List the Countries ________________ ________________ ________________ ________________ ________________	

MODULE 6: TECHNOLOGY AND CONSTRAINTS	TC	
59. Do you use the following for business purposes? a) Fixed line b) Mobile phones c) Computers d) Internet e) Other ICTs *(circle all mentioned)* Munoshandisa zvinotevera mubhisinesi renyu here? a) Foni isiri yekufamba nayo (Foni isiri serura) b) Foni yeserura/nharembozha c) Makombiyuta d) Indaneti –dandemutande remakombiyuta e) Zvimwe zvemakombiyuta *(circle all mentioned)*	Fixed line……………………… a Mobile phones………………… b Computers……………………… c Internet………………………… d Do not use ICTs……………… E → 61 Other (specify)____________ x	
60. Do you use ICTs for the following purposes? a) Marketing b) Distribution c) Research d) Communication e) Other purposes *(circle all mentioned)*	Marketing……………………… a Distribution…………………… b Research………………………… c Communication ……………… d Other (specify)____________ x	

	Munoshandisa makombiyuta nemimwewo michina yakadaro here mumabasa anotevera? a) Marketing/Mukushambadza b) Distribution/Mukufambiswa kwezvinhu zvenyu c) Research/Mutsvagurudzo yebasa renyu d) Communication/Mukufambisa mashoko e) Zvimwewo *(circle all mentioned)*		
61.	How important to you are the following technologies? a) Fixed line b) Mobile phones c) Computers d) Internet e) Sector specific hardware f) Sector specific software Zvinotevera izvi hazvina kukosha, zvakakosha, zvakanyanya kukosha mumabasa enyu? a) Foni isiri yekufamba nayo b) foni yeserura/nharembozha c) Makombiyuta d) indaneti/ dandemutande remakombiyuta e) Makombiyuta anoenderana nemabasa enyu f) Mapurogiramu emakombiyuta anoenderana nemabasa enyu	a. Fixed line Not Important…………………….. Important………………………….. Very Important…………………… b. Mobile phone Not Important…………………… Important…………………………. Very Important………………….. c. Computers Not Important…………………… Important…………………………. Very Important…………………… d. Internet Not Important…………………… Important…………………………. Very Important…………………… e. Sector specific hardware Not Important…………………… Important…………………………. Very Important…………………… f. Sector specific software Not Important…………………… Important…………………………. Very Important……………………	 1 2 3 1 2 3 1 2 3 1 2 3 1 2 3 1 2 3
62.	What are your ICT constraints? a) Cost of hardware b) Cost of software c) Access to hardware d) Access to software e) Speed of internet f) Skill to work with technology g) Network coverage h) Other specify *(circle all mentioned)*	Cost of hardware ……………… Cost of software……………….. Access to hardware…………… Access to software…………….. Speed of internet………………… Skill to work with technology…. Network coverage………………… None……………………………. Other (specify)_______________	a b c d e f g H x

Ndezvipi zvimhingamipinyi zvikuru zvamunosangana nazvo munyaya dzekushandisa makombiyuta nemimwe michina yakadaro? a) Kudhura kwemakombiyuta b) Kudhura kwemapurogiramu amunoshandisa mumakombiyuta c) Kuwana makombiyuta d) Kuwana mapurogiramu emumakombiyuta anoshandiswa mumabasa enyu e) kunonoka kweindaneti f) Ruzivo rwekushandisa makombiyuta g) Kushaikwa kwemasaisai h) Zvimwewo *(circle all mentioned)*		
63. What are the major constraints affecting your sector? *(circle all mentioned)* Ndezvipi zvimhingamupinyi zvikuru zvamunosangana nazvo mumabasa enyu etsika nemagariro? *(circle all mentioned)*	Lack of funding………………..... Lack of adequate markets………… a Piracy…………………………..... b Lack of coordination…………….. c Shortage of equipment and d materials………………………...... Working space/Venues…………… e Negative perception………………. F Staff turnover……………………… G Other (specify)_______________ H X	
64. Does the business keep records of accounts Munonyora pasi here mashandisirwo emari yebhizimisi renyu?	Yes………………………………… 1 No…………………………………. 2	

Thank You

b. INSTITUTIONAL QUESTIONNAIRE

CULTURAL STATISTICS SURVEY 2012

Measuring the economic contribution of Zimbabwe's cultural industries

QUESTIONNAIRE

Zimbabwe National Statistics Agency

CULTURE FUND Investing in Ideas

United Nations
al, Scientific and
ıral Organization

Convention on the Protection and Promotion of the Diversity of Cultural Expressions

CONFIDENTIAL **CSS**

CULTURAL STATISTICS SURVEY-2012

Objectives of the Survey

1. To quantify and analyse the economic contribution of cultural industries in Zimbabwe.
2. To inform the formulation of appropriate policy, strategy and institutional interventions for encouraging the development and growth of cultural industries in Zimbabwe.

Authority

The information is collected under the Census and Statistics Act Chapter 10.29 of 2007.

Confidentiality

All information disclosed in this questionnaire is confidential.

Due Date

Please complete the questionnaire within 5 days of receipt. Our field staff will collect the questionnaire on the due date or earlier as agreed.

Alternatively, you can email the completed questionnaire to hchigiji@zimstat.co.zw, handrixchigs@gmail.com or fax on + 263-4-792494. A second copy of the questionnaire is to be retained by you for your own records.

Completion of the Questionnaire

In cases where an enterprise has two or more establishments, each establishment has to complete a separate questionnaire.

Queries

If you have any queries or, have problems completing this questionnaire, please contact:

H. Chigiji (Mr.)
Manager, Tourism and Cultural Statistics
Zimbabwe National Statistics Agency
P.O. Box CY 342, Causeway
Harare,
Zimbabwe
Telephone: + 263 4 706681-8 or 263 4 703971-7
Fax: + 263 4 792494
Email: hchigiji@zimstat.co.zw

C. Muvezwa (Ms)
Programme Officer
Culture Fund of Zimbabwe Trust
51 Harvey Brown Ave
Milton Park
Harare
Telephone: +263-4-794530
Fax : +263-4-794211
Email: chipom@culturefund.co.zw

For C

Area Name		Area No.	0		Organisation No.	2			

PARTICULARS OF THE ORGANISATION

1.1	Legal Name of Establishment (Registered Name)	
1.2	Trading Name of Establishment (if different from question 1.1)	
1.3	Year of Commencement of Operations	
1.4	Physical Address from Which the Organisation Operates	
1.5	Postal Address of Organisation	
1.6	Fixed Telephone Number(s)	
1.7	Cell Number(s)	
1.8	Fax Number(s)	
1.9	E-mail Address	
1.10	Website Address	

MODULE 1:GENERAL INFORMATION	GI
2. What are the major activities the organisation is engaged in? *Please circle **one or more** appropriate response code(s) on the right*	Performance and Celebrations...... A Visual Arts............................ B Crafts.. C Literary Arts & Publishing............. D Film, Audio-Visual and Interactive Media.................................. E Design and Creative Services.......... F Tourism (Related domain)............. G Sport and Recreation (Related domain)................................ H Other *(specify)*________________ x
3. What kind of cultural activity (ies) is your organisation engaged in? *Give description in **two or more** words on the right*	________________ ________________
4. To which institutional sector does the establishment belong? *Please circle **one** appropriate response code on the right*	Private...................................... 1 Central government.......................... 2 Local government........................... 3 Parastatal.................................. 4 Household.................................. 5 Co-operative................................ 6 NGO... 7 Other *(specify)*__________________ 96
5. How long has your organisation been operating? *Please circle **one** appropriate response code on the right*	Less than 1 year.............................. 1 1-5 years...................................... 2 6-10 years.................................... 3 11-20 years.................................. 4 More than 20 years.......................... 5
6. Who owns the organisation? *Please circle **one** appropriate response code on the right*	Self.. 1 Partnership................................ 2 Company.................................. 3 Cooperative................................ 4 Association................................ 5 Government................................ 6 Parastatal.................................. 7 NGO... 8 Other *(specify)*__________________ 96

7. What is the nationality of the principal/majority owner of the organisation? *Please circle* **one** *appropriate response code on the right*	Zimbabwean……………………… 1 Other African……………………. 2 Asian……………………………. 3 European………………………… 4 Other *(specify)*__________ 96
8. What does your organisation do on a day to day basis? *Please circle* **one or more** *appropriate response code(s) on the right*	Agency work ……………………… A Producing ………………………. B Creating/artistic/crafting……………. C Writing ………………………….. D Composing……………………….. E Supplying………………………… F Providing education/training…………. G Providing venues /exhibition…………. H Managing facilities ………………… I Retailing ………………………… J Distribution service……………….. K Designing………………………… L Manufacturing……………………. M Other *(specify)*__________ X
9. What is the **one main** obstacle to your organisation's operations in each of the following categories: **Cost** **Regulatory Framework** **Access** **Market Conditions** **Socio-economic Conditions** **Perception** **Other** *Please circle* **one** *appropriate response code from each category on the right*	**1. Cost** ………………………… A Telecommunications………………. 11 Electricity…………………………. 12 Transportation …………………… 13 Finance ………………………….. 14 Labour……………………………. 15 Raw materials……………………. 16 Instruments/Equipment/Tools………. 17 Not an obstacle…………………… 18 Other *(specify)*__________ 96 **2. Regulatory Framework**……. ZIMRA compliance………………. B Customs and trade regulations………. 21 Labour regulations………………… 22 Business licensing and permits………. 23 Lack of industry promotion…………. 24 Not an obstacle…………………… 25 Other *(specify)*__________ 26 96 **3. Access**………………………. Telecommunications………………. C Electricity ………………………. 31 Transportation …………………… 32 Finance ………………………….. 33 Labour……………………………. 34 Raw materials……………………. 35 Not an obstacle…………………… 36 Other *(specify)*__________ 37 96

	4. Market conditions…………..	D
	Tax rates…………………………….........	41
	Skilled workforce……………………........	42
	Practices of competitors…………….........	43
	Exchange rate………………………..........	44
	Not an obstacle……………………….......	45
	Other *(specify)*__________________	96
	5.Socio-economic conditions….	E
	Substance abuse………………..............	51
	HIV&AIDS………………………..........	52
	Corruption………………………..........	53
	Crime, theft and disorder………...........	54
	Intellectual infringement (piracy……)……………………….........	55
	Not an obstacle…………………….......	56
	Other *(specify)*__________________	96
	6.Perception……………………	F
	Public…………………………………........	61
	Policy makers………………………..........	62
	Media………………………………….........	63
	Family…………………………………........	64
	Not an obstacle……………………........	65
	Other *(specify)*__________________	96
	7.Other *(specify)*__________	96
10. What do you see as your organisation's main need for development *Please circle **one** appropriate response code on the right*	Training………………………………	1
	Help with strategy and business planning………………………….....	2
	Help with developing new ideas for cash generations…………………….....	3
	Help with improving process and efficiency……………………………...	4
	Help with marketing ………………….....	5
	Help obtaining government funding………………………………..	6
	Help obtaining commercial funding………………………………...	7
	Help with international Expansion……………………………..	8
	Help with ICT usage (marketing, distribution)………………………..	9
	Help obtaining assistance from bilateral, multilateral and other national assistance…………………….................	10
	Other *(specify)* _________________	96

MODULE 2: EMPLOYMENT	E
11. Give the number of employees in your organisation as at 30 September 2011 and 30 September 2012 by employment category and sex? *Please write the numbers in the boxes on the right* *If none record "00"*	AS AT 30 SEPTEMBER 2011

Type of Employee	Number		
	Males	Females	Total
Full-Time			
Part-Time			
Total			

AS 30 SEPTEMBER 2012

Type of Employee	Number		
	Males	Females	Total
Full-Time			
Part-Time			
Total			

12. What is the average contract length of your employees? *Please write the number in the boxes on the right or circle the appropriate response code*	Open-ended……………………….……	1
	Other *(specify)* [ ][ ]…	96

13. What is the distribution of employees by income ranges (per month) as at 30 September 2012:
    a. Part-time
    b. Full-time

Please write the numbers in the boxes on the right

Monthly Cash Income	Number of Employees	
	Part-time	Full-time
$1 -$150		
$151-$250		
$251- $350		
$351 - $450		
$451-$550		
$551-$650		
$651-$750		
$751-$1 000		
$1 001-$1 500		
$1 501-$3 000		
$3 000 and above		
Total		

14. Has the average income of employees increased, decreased, or not changed in the last 12 months?

No Change……………………………………1
Decreased……………………………………2
Increased……………………………………3
Fluctuated……………………………………4

15. Give the number of employees with disabilities in your organisation by sex as at 30 September 2012?

Please write the numbers in the boxes on the right. If none record "00"

Males
Females
Total

MODULE 3: FINANCE (INCOME AND EXPENDITURE)	F	
If the organisation was not operating in 2011, skip to question 20 16. What was the organisation's main source of income in year 2011. *Please circle **one** appropriate response code on the right*	Direct sales of products (CDs, artifacts)………. Shows/exhibitions……………………………… Sessions………………………………….............. Royalties……………………….…………….. Tours……………………………….…………… Family/Friends……………………………….. Subletting space …………………………….. Donors……………………..……………........ Government ……………….………………… Funding agencies……………………………… Engagement in non-cultural activities…………. Other *(specify)*________________________	1 2 3 4 5 6 7 8 9 10 11 96
17. What was the organisation's next main source of income in year 2011. *Please circle **one** appropriate response code on the right*	Direct sales of products (CDs, artifacts)………. Shows/exhibitions……………………………… Sessions………………………………….............. Royalties……………………….…………….. Tours……………………………….…………… Family/Friends……………………………….. Subletting space …………………………….. Donors……………………………………........ Government ………………………………… Funding agencies…………………………. Engagement in non-cultural activities………… Other *(specify)*____________________	1 2 3 4 5 6 7 8 9 10 11 96
18. Give annual gross estimate revenue for your organisation in the year 2011. *Please write the amount in the box on the right*	Annual Estimate 2011	$
19. What was your organisation's annual cost/expenditure for the year 2011 *Please write the amount in the box on the right*	Annual estimate 2011	$
20. What activity or goods consume a large part of your organisation's revenue *Please circle **one** appropriate response code on the right*	Direct raw material cost…………….…………. Operating cost (rent, transport, electricity, interest charges)……………………….……………… Wages, salaries and related costs (allowance, bonuses)……………………..…………….. Instrument/tools/equipment purchase/hire cost………………………………………..... Other *(specify)*______________________	1 2 3 4 96

21. What is the next highest activity or goods that consume a large part of your organisation's revenue? *Please circle **one** appropriate response code on the right*	Direct raw material cost………………..………… 1 Operating cost (rent, transport, electricity, interest charges)………………………………..……… 2 Wages, salaries and related costs (allowance, bonuses)……………………………………….. 3 Instrument/tools/equipment purchase/hire costs………………..……………......................... 4 No other cost………….…………………….….. 5 Other (specify)________________ 96
22. What is the value of your business assets (machinery/tools/equipment)? *Please write the amount in the box on the right* *If there are no assets record 00*	Assets Value $
23. How much does your organisation owe other organisations and/or individual artists? *Please circle one appropriate response code on the right.* *If organisation does not have any debt/liability circle code 1*	$0.. 1 $1 - $499………..………………………...... 2 $500 - $999…………………..……………....... 3 $1 000 - $4 999……………………………....... 4 $5 000 - $9 999……………………………....... 5 $10 000 - $14 999…………………………....... 6 $15 000 - $19 999…………………………....... 7 $20 000 - $49 999…………………………....... 8 $50 000 - $99 999…………………………....... 9 Above $100 000…………………………...... 10

MODULE 4 : FUNDING AND MARKET	FM
24. Has your organisation received any funding in the last two years (from 30 September 2010 to 30 September 2012)? If yes from where? *Please circle **one or more** appropriate response code(s) on the right*	Did not receive any funding………………… A Government…………………………….…..... B Funding agencies…………..……………….. C Banks… …………………………….……….. D Other corporate…………………………...... E Other specify_______________ X
25. What is the main market for your organisation? *Please circle **one** appropriate response code on the right*	Firms or Companies……………………...... 1 General public –individual artists.............……...... 2 Public sector – government ………………..... 3 Tourists... 4 Other *(specify)* ________________ 96

26. Where does your organisation sell its products (goods or services)? *Please circle **one** appropriate response code on the right side*	Locally (In Zimbabwe)………………………... 1 Abroad (Outside Zimbabwe)………..……......... 2 Both…………………………………………......... 3
For response code '2' or '3' in Question 26 27. What percentage of products (goods or services) does your organisation sell abroad? *Please write the percentage in the boxes on the right*	☐☐☐
For response code '2' or '3' in Question 26 28. If your organisation sells its its products (goods or services) outside Zimbabwe, name the external markets.	List the Countries ____________________ ____________________ ____________________ ____________________ ____________________ ____________________ ____________________

MODULE 5: TECHNOLOGY AND CONSTRAINTS	TC
29. Which of the following ICTs does your organisation use for business purposes? Fixed line Mobile phones Computers Internet Other *Please circle **one or more** appropriate response code(s) on the right.*	Fixed line……………………….................... A Mobile phones…………………..................... B Computers……………………….................. C Internet………………………….................. D Do not use ICT……………......................... E Other *(specify)*________________ X
30. If your organization uses ICTs, what do you use it for? *Please circle **one or more** appropriate response code(s) on the right*	Marketing………………………..................... A Distribution…………………….................... B Research……………………….................... C Communication ……………....................... D Other *(specify)*________________ X

31. How important to your organisation are the following technologies? a) Fixed line b) Mobile phones c) Computers d) Internet e) Sector specific hardware f) Sector specific software *Please circle **one** appropriate code for each technology on the right*	**a.Fixed line** Not Important………………………………… Important……………………………………. 1 Very Important……………………………. 2 3 **b.Mobile phone** Not Important………………………………… Important……………………………………. 1 Very Important……………………………... 2 3 **c.Computers** Not Important………………………………… Important……………………………………. 1 Very Important……………………………... 2 3 **d.Internet** Not Important………………………………… Important……………………………………. 1 Very Important……………………………... 2 3 **e. Sector specific hardware** Not Important………………………………… Important……………………………………. 1 Very Important……………………………... 2 3 **f. Sector specific software** Not Important………………………………… 1 Important……………………………………. 2 Very Important……………………………... 3

32. What are your organisation's ICT constraints? *Please circle* ***one or more*** *appropriate response code(s) on the right*	Cost of hardware .... Cost of software.................................... Access to hardware.................................... Access to software.................................... Speed of broadband.................................... Poor Connectivity.................................... Skill to work with technology.......................... Obsoleteness.................................... No ICT constraints.................................... Other (specify)________________________ N/A..	A B C D E F G H I X Y
33. What do you think are the major constraints affecting your sector? *Please circle* ***one or more*** *appropriate response code(s) on the right*	Lack of funding.................................... Lack of adequate markets.............................. Piracy.................................... Lack of coordination.................................... Shortage of equipment and materials............... Working space/Venues.............................. Negative perception.............................. Staff turnover.................................... Other *(specify)*________________________	A B C D E F G H X
34. Does the organisation keep records of accounts	Yes.................................... No....................................	1 2

Thank you for your cooperation

For *Official Use Only*

	EN	TL	PS	CO	CH	DC	VR
Name:							
Signature:							
Date:	___/___/12	___/___/12	___/___/12	___/___/12	___/___/12	___/___/12	___/___/12

Acknowledgement of Receipt of the Cultural Statistics Survey 2012 Questionnaire

I,……………………………………………………………………………of ………………………………………..………………………..

(name of recipient) *(name of Establishment)*

do acknowledge receipt of the Cultural Statistics Survey questionnaire.

Designation:	
Landline Number(s):	
Cell Number(s):	
Signature:	
Date Stamp:	
Interviewer's Name:	
Interviewer's Cell Number:	
Date of collection of questionnaire:	

Note: *This page should be filled in, at the time of delivery, by the person who is receiving the questionnaire on behalf of the organisation. The interviewer must retain the original copy.*

Thank You

F*or Official Use Only*

Area Name		Area No.	0		Organisation No.	2				

Comments by Field Staff:

APPENDIX 3: LIST OF PRODUCTS INCLUDED IN THE TRADE OF WORKS OF ARTS

Domain	Product Codes and Names
Cultural and Natural Heritage	970500:Collections and collector's pieces of zoological... interest
	970600:Antiques of an age exceeding 100 years
Performance and Celebrations	
	490400:Music, printed or in manuscript
	852321:Cards incorporating a magnetic stripe
	852329:Other
	852351:Solid state non-volatile storage devices
	852359:Other
	852380:Other
	920110:Upright pianos
	920120:Grand pianos
	920190:Automatic pianos, harpsichords and other keyboard instruments, nes
	920210:String musical instruments played with a bow
	920290:String musical instruments, nes
	920510:Brass-wind instruments (eg clarinets and trumpets)
	920590:Wind musical instruments (excl. brass-wind)
	920600:Percussion musical instruments (eg drums, xylophones, cymbals, etc)
	920710:Keyboard instruments with electrically produced or amplified sound
	920790:Musical instruments, nes, with electrically produced or amplified sound
	920810:Musical boxes
	920890:Fairground organs, etc; decoy calls of all kinds; whistles, etc
	830610:Bells, gongs, etc, non-electric, of base metal
Visual Arts and Crafts	370510:Photographic plates..., exposed and developed, for offset reproduction
	370590:Photographic plates..., exposed and developed, nes
	711311:Articles of jewellery and parts thereof of silver
	711319:Articles of jewellery and parts thereof of precious metal (excl. silver)
	711320:Articles of jewellery... of base metal clad with precious metal
	711411:Articles of goldsmiths' or silversmiths' wares of silver
	711419:Articles of goldsmiths' or silversmiths' wares of precious metals, nes
	711420:Articles of goldsmiths'... wares of base metal clad with precious metal
	711610:Articles of natural or cultured pearls
	711620:Articles of precious or semi-precious stones (excl. pearls)
	600240:Knitted or crocheted fabrics of a width =< 30cm with => 5% elastic yarn but no rubber
	600290:knitted or crocheted fabrics, nes, >30cm wide
	600310:Knitted or crocheted fabrics of wool or fine animal hair =< 30cm other than of 60.01/02
	600320:Knitted or crocheted fabrics of cotton =< 30cm other than of 60.01 or 60.02
	600330:Knitted or crocheted fabrics of synthetic fibres =< 30cm other than of 60.01/02
	600340:Knitted or crocheted fabrics of artificial fibres =< 30cm other than of 60.01/02

Visual Arts and Crafts	600390:Knitted or crocheted fabrics of a width =<30 cm, nes.
	600410:Knitted or crocheted fabrics of =>30cm with =>5% weight of elast yarn with no rubber thr
	600490:Knitted or crocheted fabrics, nes, of a width =>30cm
	580500:Hand-woven tapestries of the type Gobelins, Flandres, etc
	580610:Narrow woven pile fabrics and chenille fabrics
	580620:Narrow woven fabrics, with >=5% elastomeric yarn or rubber thread
	580631:Narrow woven fabrics of cotton, nes
	580632:Narrow woven fabrics of man-made fibres, nes
	580639:Narrow woven fabrics of other textiles, nes
	580810:Braids, in the piece
	580890:Ornamental trimmings in the piece; tassels, pompons, etc, nes
	580900:Woven fabrics of metal thread and woven fabrics of metallized yarn, nes
	581010:Embroidery without visible ground
	581091:Cotton embroidery, in the piece, in strips or in motifs
	581092:Embroidery of man-made fibres, in the piece, in strips or in motifs
	581099:Embroidery of other textiles, in the piece, in strips or in motifs
	581100:Quilted textile products in the piece (excl. embroidery of 58.10)
	960110:Worked ivory and articles of ivory
	960190:Worked bone, tortoise-shell, horn... and articles thereof, nes
	830621:Statuettes and other ornaments of base metal, plated with precious metal
	830629:Statuettes and other ornaments of base metal (excl. plated)
	701890:Glass statuettes and other ornaments of lamp-worked glass, nes
	691310:Statuettes and other ornamental articles of porcelain or china
	691390:Statuettes and other ornamental articles (excl. porcelain or china)
	442010:Statuettes and other ornaments, of wood
	442090:Wood marquetry, inlaid wood; caskets... of wood
	392640:Statuettes and other ornamental articles of plastics
	970300:Original sculptures and statuary, in any material
	970110:Paintings, drawings and pastels executed entirely by hand
	970190:Collages and similar decorative plaques, executed entirely by hand
Books and Press	490900:Printed or illustrated postcards; printed cards bearing greetings, etc
	491000:Calendars of any kind, printed, including calendar blocks
	490300:Children's picture, drawing or colouring books
	490510:Globes
	490591:Maps and hydrographic or similar charts, in book form
	490599:Maps and hydrographic or similar charts, printed, not in book form
	490210:Newspapers, journals and periodicals, appearing >= four times a week
	490290:Newspapers, journals and periodicals, appearing < four times a week
	490191:Dictionaries and encyclopaedias, and serial instalments thereof
	490199:Printed books, brochures, leaflets and similar printed matter, nes
Film, Audio-Visual and Interactive Media	370610:Cinematograph film, exposed and developed, width >=35mm
	950410:Video games of a kind used with a television receiver
	370690:Cinematograph film, exposed and developed, width <35mm
Design and Creative Services	490600:Plans... for architectural... purposes; hand witten texts; photographs of

REFERENCES

- 2009 UNESCO Framework for Cultural Statistics
- 2011 Labour Force and Child Lobour Report-ZIMSTAT
- 2013 Trade Statistics, ZIMSTAT

Zimbabwe National Statistics Agency
P.O. Box CY 342
Causeway, Harare
Zimbabwe
Telephone: 263-4-706681/8 or 263-4-703971/7
Fax: 263 4 792494
Email: info@zimstat.co.zw
Website: www.zimstat.co.zw