REPORT ON THE MAPPING OF CULTURE AND CREATIVE INDUSTRIES IN UGANDA




By

MINISTRY OF GENDER, LABOUR AND SOCIAL DEVELOPMENT

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FOREWORD

The 2013 Mapping Study of Culture and Creative Industries in Uganda was undertaken by a partnership led by the Ministry of Gender, Labour and Social Development (MGLSD). The other partners were the Uganda Bureau of Statistics (UBOS) and the Ministry of East African Community (MEACA). The Study was financed by the East African Community (EAC) Secretariat.

The Study sought to obtain sector information on Culture and Creative Industries especially in the areas of; products and operators, productive/economic activity, statistics, marketing and domain specific information. The need for this information emanates from the increasing recognition of the sectors contribution to social, economic and political development in East Africa and the world at large. On the global scene, trade in cultural goods and services is impressive. For instance, in the period 2000-2005, trade in creative goods and services increased at an unprecedented average annual rate of 8.7 per cent (UNCTAD, 2008).

Article 119 of the Treaty for the establishment of the EAC requires Partner States to promote close cooperation amongst themselves in culture and sports. For culture, the Treaty notes the need to promote fine arts, literature, music, performing arts and other artistic creations along with the conservation, safeguarding and development of historical materials and antiquities. Furthermore, the Treaty emphasizes the regulation of cross border trade in ethnographic materials, licensing of antique dealers and adoption of a common approach and cooperation in tackling the illicit cross border trade in cultural property.

The EAC aims at widening and deepening cooperation among the Partner States in among others, political, economic and social fields for our mutual benefit. It is against this background that it funded the study in all the East African Community countries. Through this, the Secretariat would like to promote regional socio-cultural integration and showcase culture and creative industries as primary drivers of the economies of the Partner States.

As the Ministry responsible for Culture in Uganda, we express our gratitude to the EAC Secretariat and the collaborating institutions in Uganda for the technical and financial support. Last but not least, we thank the Mapping Study Technical team and our stakeholders for the cooperation in execution of this activity.

Pius Bigirimana
PERMANENT SECRETARY
MINISTRY OF GENDER, LABOUR AND SOCIAL DEVELOPMENT

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KEY TERMS AND DEFINITIONS

Administrative Survey: It is a collection of data from administrative records in which information is extracted from files.

Audio Visual and Interactive Media: This is a domain under the UNESCO 2009, Framework for Cultural Statistics that covers; Film and Video, TV, Radio, Internet Live Streaming and Video Games.

Books and Press: This is a domain under the UNESCO 2009, Framework for Cultural Statistics that covers books, newspapers, and magazines, other printed matter, literary works and book fairs.

Creative Industries: Creative Industries are those industries which have their origin in individual creativity, skills and talent and which have a potential for wealth and job creation through the generation and exploitation of Intellectual Property. They include; folk art, festivals, music, books, paintings, performing arts, cuisine, fashion, crafts, traditional medicine, film industry, broadcasting, digital animation, video games, architectural and advertising services.

Culture: Culture is a whole complex of distinctive, spiritual, material, intellectual and emotional features that characterize society or social groups. It includes not only the arts and letters but also modes of life, fundamental rights of the human being, value systems, traditions, habits and behaviors' (UNESCO)

Culture Activities: These embody or convey cultural expressions, irrespective of the commercial value they may have. These activities may be an end in themselves or they may contribute to the production of cultural goods and services.

Cultural and Natural Heritage: is a domain under the UNESCO 2009, Framework for Cultural Statistics that includes; Museums, Archeological and Historic Places, Cultural Landscapes and Natural Heritage

Cultural Domain: It is a pragmatic classification used by the cultural framework for Culture Statistics (UNESCO 2009) for which the purpose is to measure Culture activities, goods and services that are generated by industrial and non- industrial processes.

Cultural Goods: These are goods that convey ideas, symbols and ways of life that are of aesthetic, ethnological/ anthropological, scientific and social significance.

Cultural Heritage: Tangible and intangible realities that communities, groups and individuals recognize and cherish as part of their lifestyle. Heritage items can be tangible such as artifacts, traditional dress or intangible items such as language, oral traditions, customs, music, dance and rituals.

Cultural Tourism: This is consumption of culture through experiencing cultural environments whether inform of tangible heritage sites such as sites and monuments, visual art, crafts, material settlements or intangible heritage like values, traditions, beliefs and lifestyles. As a domain of the UNESCO 2009, Framework for Cultural Statistics, it includes; Cultural travel and other tourist services, Hospitality and Accommodation.

Design and Creative Services: This is a domain under the UNESCO 2009, Framework for Cultural Statistics that includes; Fashion Design, Graphic Design, Interior Design, Architectural Services and Advertising Services.

Government Subvention: This is a disbursement to support activities of a semi-autonomous body, non-Government or private Institutions.

Intangible Cultural Heritage: These are practices, representations, expressions, knowledge, skills--that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. . Intangible Cultural Heritage includes; language, oral traditions, performing arts, music, festive events, rituals, social practices, traditional craftsmanship, knowledge and practices concerning nature. As a domain under the UNESCO 2009, Framework for Cultural Statistics, Intangible Cultural Heritage includes; Oral Traditions and Expressions, Rituals, Languages and Social Practice.

Indigenous knowledge is the traditional local knowledge exiting within and developed around the specific conditions of a community that is indigenous to a particular geographic area.

Partnership: A legal form of business operation between two or more individuals who share management and profits.

Performing Arts and Celebration: This is a domain under the UNESCO 2009, Framework for Cultural Statistics that covers Performing Arts, Music, Festivals, Fairs and Feasts

Private Company: It is a type of company that offers limited liability to its shareholders but that places certain restrictions on its ownership.

Public Company*:* is a limited company that offers its securities (stock/shares, bonds/loans,.) for sale to the general public, typically through a stock exchange, or through market makers operating in over the counter markets.

Sole Proprietorship: is a business that legally has no separate existence from its owner. Income and losses are taxed on the individual's personal income tax returns.

Visual Arts and Crafts: These are expressions and objects that result from the feelings of people in response to a variety of historical events, influences and the environment in a spontaneous manner. Under the UNESCO 2009, Framework for Cultural Statistics, the Visual Arts and Crafts domain covers; Fine Art, Photography and Crafts

ACRONYMS

AGOA	American Growth Opportunities Act
APNET	African Publishers Network
CCFU	Cross-Cultural Foundation of Uganda
COBE	Census of Business Enterprises
COMESA	Common Market for East and Central Africa
CSOs	Civil Society Organizations
CSPro	Census and Survey Procedures
EABDC	East African Books Development Council
EAC	East African Community
EBA	Everything But Arms
FEMRITE	Female Writers Association
GC	Global Compact
HANSED	Handicraft Sector Export Strategy
ICESCR	International Covenant on Economic, Social and Cultural Rights
ILO	International Labour Organization
ITC	International Trade Centre
MEACA	Ministry of East African Affairs
MGLSD	Ministry of Gender Labour and Social Development
NACCAU	National Arts and Crafts Association of Uganda
NACOTHA	National Council of Traditional Healers and Herbalists Associations
NAWOU	National Association for Women Organizations in Uganda
NCRL	National Council of Research Laboratory
NDP	National Development Plan
NEPAD	New Partnership for African Development
NES	National Export Strategy
NMC	National Media Council
NPA	National Planning Authority
PPS	Probability Proportional to Size
SDS-SPS	Social Development Sector Strategic Plan for Statistics
SMEs	Small and Medium Enterprises
UBC	Uganda Broadcasting Corporation
UBI	Uganda Business Inquiry
UBOS	Uganda Bureau of Statistics
UCC	Uganda Communications Commission
UDHR	Universal Declaration of Human Rights
UEPB	Uganda Export Promotion Board
UIA	Uganda Investment Authority
UN	United Nations
UNATCOM	Uganda National Commission for UNESCO
UNBS	Uganda National Bureau of Standards
UNCC	Uganda National Cultural Centre
UNCP	Uganda National Cultural Policy
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme

UNESCO	United Nations Education Scientific Culture Organization
UNIDO	United Nations Industrial Development Organization
UNLF	Uganda National Labour Force
CAS	Child Activities Survey
URA	Uganda Revenue Authority
URSB	Uganda Registration Services Bureau
WBS	Wavah Broadcasting Service
WHO	World Health Organization
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

EXECUTIVE SUMMARY

The East African Community Secretariat commissioned the mapping Study of Culture and Creative Industries in each of the Countries in the region. The overall objective of the Study was to identify institutions dealing in cultural and creative activities within the EAC Partner States and establish their contribution to incomes and employment in the region.

The Study was preceded by the development of relevant tools and the identification of relevant technical people and institutions in the East African region. For the first time, the Ministries responsible for culture and those responsible for East African Community Affairs partnered with the institutions responsible for Statistics to design the Study. In Uganda, The Ministry of Gender, Labour and Social Development took the lead in this activity. It partnered with the Ministry of East African Community Affairs and the Uganda Bureau of Statistics.

The Study, which was undertaken in the month of April and June 2013, was informed by the UNESCO Framework for Culture Statistics (2009) and therefore covers the domains of Performing Arts and Celebration, Book and Press, Cultural and Natural Heritage, Visual Arts and Crafts, Audio Visual and Inter-active Media, Design and Creative Services, Cultural Tourism, Sports and Recreation and Intangible Cultural Heritage.

The design employed a one-stage cluster sampling method where institutions were grouped into 8 stratums. Large institutions (employing 20 people and more) and the small institution (employing less than 20 individuals). The randomly representative sample was selected using Probability Proportional to size (PPS) of the number of institutions that were found in a stratum (cultural domains). In order to generate a representative sample across the entire cultural domains, the two samples were grossed to add up to 712 institutions and these formed the overall national sample for the Culture and Creative industries in Uganda given the resource constraint.

Existing studies indicate that culture and creative industries are thriving in Uganda. For instance, over 250,000 people are employed in these industries with the book and press domain accounting for the highest percentage of employment (34%) compared to other domains (UNATCOM: 2009). In terms of tax revenue, creative goods and services contributed Ug. Shs. 12.6 billion (US$6.7million) between 2006 -2009, and import duty alone contributed Ug. Shs. 8.6 billion (US$ 4.5 million).

The Study revealed that most of the culture and creative industries are in Kampala (47.1%) and about half (48%) of the culture and creative Industries are formally registered. Most of these

industries have been in existence for between 5-9 years (34%). Those that have existed for 20 or more years were institutions involved in Cultural and Natural Heritage activities.

The majority of the practitioners, (45%) had primary level education. However, wide disparities were observed between the domains. The Performing Art and Celebration domain had the highest percentage of individuals with above secondary education (42%) while Cultural and Natural Heritage had the lowest (2%). Furthermore, about half of individuals engaged in these industries (51%) were in the age group of 31 years and above. Half of the individuals in the industry had worked for less than a decade. Meanwhile, a higher percentage of males (58%) had worked for 10 or more years compared to females (50%). In addition, the majority of persons (70%) directly undertaking cultural productive activities are permanent employed with the Audio-Visual and Interactive Media domain having the highest number of permanent employees.

In the area of economic performance, the market coverage for both institutions and individuals was largely local (over 80%) with word of mouth being the dominant marketing strategy used across the domains. The Study indicates that culture and creative industries have not yet achieved their potential because there are still small and struggling. For instance, about 6 in every 10 (59%) of the institutions in the Study had gross incomes not exceeding US$ 5000 and only six percent of institutions had gross revenues/incomes in excess of US$ 500,000. Furthermore, most of the enterprises (57%) had been in existence for less than a decade.

The industry is dogged by inadequate skills and knowledge and limited funding that lead to unprofessionalism and poor coordination. In addition, the protection of intellectual property, which is very critical for the growth of these industries, is also inadequate.

Accordingly, the report recommends among others, the development of a framework for culture statistics to enhance planning in the sector, review of relevant laws and domestication of Conventions that have been ratified. Also, funding and investment in the sector at all levels should be increased so that the growth of these industries can be catalyzed.

Other recommendations include; protecting intangible cultural heritage because it is the basis for the products and creativity, capacity building for practitioners and supporting the enforcement of intellectual property rights. This can only be achieved if the Creative Economy is formalized and therefore the development and implementation of the Action Plan for Creative Industries by the Ministry of Gender, Labour and Social Development and other stakeholders should be fast-tracked.

CHAPTER ONE
INTRODUCTION

1.1 Background

The Mapping of Culture and Creative Industries in Uganda is a regional initiative spear headed by the East African Community (EAC). The activity was in conformity with the Common Market protocol pillar on the EAC integration that aspires to accelerate economic growth and development in the region. Under Article 42 and 43 of the Common Market Protocol, Partner States undertake to foster cooperation in the field of intellectual property rights, promotion and protection of creativity and innovation for economic, technological, social and cultural development. The development of culture and creative industries has been prioritized in the 4th EAC Development Strategy.

Aware that culture and creative industries play a significant role in the socio-economic development, the East African Community (EAC) identified the need to collect, analyze and disseminate the various cultural and creative activities undertaken in the EAC Region. This would help the different people in the Region to appreciate each other, and provide statistical information on the various cultural and creative activities within the Region.

1.2 Survey Objectives

The overall objective of the Mapping Study was to identify institutions dealing in cultural and creative activities within the EAC partner states and their contribution to income and employment in the region.

The Specific objectives of the study were:

1. To establish institutions dealing in and promoting cultural and creative industries within the East African Community region;
2. To map the existing data/statistics being collected by these institutions;
3. To identify the productive/economic activities of these institutions;
4. To collect detailed information on the above activities in terms of employment, income, and marketing strategies; and
5. To identify challenges faced by institutions in promoting cultural and creative industries within the EAC region.

1.3 Survey Design and Coverage

1.3.1 Study Population

The study populations were institutions engaged in cultural and creative industries. The institutions were drawn from the eight domains including; 6 cultural domains, two related domains and Intangible Cultural Heritage as defined in the UNESCO Framework for Culture Statistics (2009). These are captured below;

Cultural Domains

i. **Performing Arts and Celebrations**: Institutions engaged in Performing Arts (dance) Music, Festivals, Fairs and Feasts
ii. **Visual Arts and Crafts**: Institutions engaged in Fine Art, Photography and Crafts
iii. **Audio Visual and Interactive Media**: Institutions dealing in the Film and Video, TV, Radio stations and Internet cafés
iv. **Design and Creative Services** :Institutions engaged in Fashion Design (tailoring), Graphic Design, Interior Design, Landscape Design, Architectural Services and advertising services
v. **Books and Press**: Institutions engaged in the production and selling of books, Newspapers and Magazines, other printed materials, literary works and Book Fairs
vi. **Cultural and Natural Heritage:** This domain includes; Museums, Archeological and Historical Places, Cultural Landscapes and Natural Heritage

Related Domains

vii. **Cultural Tourism:** Institutions engaged in Cultural travel and Tourist Services, Hospitality and Accommodation services
viii. **Sports and Recreation:** Institutions engaged in organized or competitive sports as well as physical fitness, well-being and physical recreation activities.
ix. **Intangible Cultural Heritage:** Institutions engaged in Oral traditions and Expressions, Rituals, Language, Social Practices and Rituals.

1.3.2 Sampling Frame

The Uganda Business Inquiry (UBI) of 2010/11 was used in generating a sampling frame for all institutions engaged in culture and creative industries in Uganda. Nationally representative samples of 712 institutions were selected from the list.

1.3.3 Study Design

The design employed a one-stage cluster sampling method where institutions were grouped into 9 stratums.

Large institutions (employing 20 people and more) and the small institutions (employing less than 20 individuals). The large institutions (184) had a share of over 80 percent in terms of employment for all the cultural institutions thus these were sampled with certainty (that is, with a probability of 1).

The remaining 20 percent in the share of employment went to the small institutions (528 institutions) across the different domains. This randomly representative sample was selected using Probability Proportional to size (PPS) of the number of institutions that were found in a specific stratum (cultural domain).

In order to generate a representative sample across all the cultural and related domains, the two samples were grossed to add up to 712 institutions and these formed the overall national sample for the culture and creative industries in Uganda given the resource constraint.

On the other hand, individuals were selected randomly from a list of individuals that had registered in their specific domains such as women writers with FEMRITE, Film Makers with Uganda Federation of Movie Industry, and Herbalists with NACOTHA and crafts people with NACCAU.

1.4 Survey Instruments

The study used two types of questionnaires namely; the institutional and the individual questionnaire. The contents of these questionnaires were based on the recommendations from the technical expert meeting that was held in Arusha in February 2012. In this meeting all the relevant tools (questionnaires, terms of reference and manual of instructions) were developed. **(Appendix 2)**

The institutions were required to provide information in the following areas:

Section A: General information
Section B: Information about the organization
Section C: Cultural Productive/Economic Activity
Section D: Culture and Creative Industries Statistics
Section E: Marketing Strategies and experience
Section F: Information on specific domain activities

1.5 Data Collection

UBOS identified 32 field (24 interviewers and 8 supervisors) staff from the UBOS field work database to work as supervisors and field staff and the Ministry of East African Affairs (MEACA) appointed them. The supervisors and interviewers were selected on the basis of maturity, education level, ability to speak the local language and willingness to work within the specific period. The training of the field staff was mainly classroom based with a few practical demonstrations to boost their confidence while in the field. They were trained to interview and fill the questionnaire in the presence of the respondent.

A nationwide data collection exercise targeting 712 culture and creative industry institutions was undertaken. Eight teams consisting of 1 supervisor, 3 interviewers and 1 driver were formed. These were deployed across the four regions in Uganda. The field supervisor was responsible for the entire team, identifying the institutions, ensuring that quality data was collected and returning the questionnaires from the field.

Staff from the three institutions (Ministry of Gender Labour and Social Development (MGLSD), the Ministry of East African Community Affairs (MEACA) and the Uganda Bureau of Statistics supervised the field data collection to ensure and improve the quality of work.

1.6 Data Processing

Completed questionnaires were returned to UBOS headquarters where data editing and entry was done. A team of 13 data entry clerks and two supervisors were recruited and trained to do the data entry. The data entry operators and editors captured and edited the questionnaires respectively. The data was captured using CSpro. This started immediately after data collection.

1.7 Quality Control

Sample surveys are usually affected by two types of errors that is; non-sampling and sampling errors. Non sampling errors were minimized through supervision at every stage of the Study. The stages included questionnaire design, training of field staff, data collection, data processing and analysis. The Study employed various quality control checks at all stages such as conducting field supervision in addition to developing a data entry programme with checks.

The sampling errors which occur during the sample selection are measured by determining the standard error for a particular statistic, such as the mean, proportions and totals.

1.8 Response Rate

The overall response rate was 62 percent Table 1.1 summarizes the distribution of the sample across the 712 Institutions selected in the sample, 461 were successfully interviewed yielding a response rate of 65 percent at institutional level.

Table 1 : Response rates by domain

Domain	Sampled Institutions	Completed	Response Rate
Design and creative arts	124	76	61.3
Audio-visual	157	122	77.7
Books and press	133	61	45.9
Tourism	73	35	47.9
Sports and recreation	62	63	101.6
Visual Arts and crafts	81	59	72.8
Cultural & Natural heritage	31	18	58.1
Performing Arts and Celebration	23	20	87.0
Intangible Heritage	28	7	25.0
Total	712	461	64.7

1.9 Survey Limitations

The Study had some challenges as listed below:

1. The lack of a culture statistics framework within the region was a major hindrance since the list of activities under each domain in one country may differ from the list of activities in the same domain in another EAC partner state. Hence comparability becomes a challenge.
2. The lack of a comprehensive sampling frame for culture and creative industries and individuals in Uganda made locating these institutions difficult hence the high none-response rate.
3. The limited number of researches in culture and creative arts made it difficult to access and corroborate information.

CHAPTER TWO
SITUATIONAL ANALYSIS

2.1 Legal and Policy Framework

The legal and policy framework on culture in Uganda consists of National and International Legal and Policy instruments. These include; the 1995 Constitution of Uganda and other laws and International Conventions to which Uganda is a State Party. The main policy on culture is the Uganda National Culture Policy.

2.1.1 National Legal Framework in Uganda

(i) The 1995 Constitution of Uganda

The 1995 Constitution of Uganda recognizes the importance of culture and supports the promotion and preservation of those cultural values and practices which enhance the dignity and well-being of Ugandans. Among others, it encourages the development and preservation of Ugandan languages as well as the protection and promotion of Uganda's built heritage.

Objective XXIV of the Constitution states that *"cultural and customary values that are consistent with the fundamental human rights and freedoms, human dignity and democracy and with the Constitution of Uganda may be developed and incorporated in all aspects of Ugandan life"*. In addition, Objective XXV mandates the State and citizens to preserve and promote public property and Uganda's heritage. Furthermore, the 3rd Schedule of the Constitution recognizes the 65 Indigenous Communities of Uganda.

(ii) Other National Laws

The laws that specifically provide for culture include but are not limited to the following: the Institution of Traditional or Cultural Leaders Act, 2011, the Copyright and Neighboring Rights Act, 2006, The Local Government Act, 1997, the Uganda National Cultural Centre Act 1959, The Historical Monuments Act, (Amendment of 1977), The Stage Plays and Public Entertainment

Act, 1943 and the Traditional Rulers (Restitution of Assets and

Properties) Act, 1993. These Acts of Parliament address various aspects that are also captured in the Uganda National Culture Policy.

The Constitution of Uganda and other laws have guided the mapping of cultural industries in Uganda. For instance, under the Historical Monuments Act, (Amendment of 1977), the Ministry of Tourism, Wildlife and Antiquities carried out a mapping of intangible and tangible heritage in 2007 and established that there are over 367 cultural sites. Furthermore, the Institution of Traditional or Cultural Leaders Act, 2011 provides for the maintenance of gazetted cultural sites which have also been mapped by the Uganda Museum.

Meanwhile, some of the laws such as the Uganda National Cultural Centre Act and the Stage Plays and Public Entertainment Act are under review because some portions of the law are either obsolete or are not in tandem with existing realities.

Furthermore, The Local Government Act, 1997 amended 2002, lists cultural affairs as one of the decentralized services, activities and functions of the district authorities. However, culture is accorded low priority due to the limited appreciation of its contribution to the socio-economic development of the Country. Although there have been some attempts to map cultural heritage in various local Governments, these have been driven by local development initiatives at local Government level because there is no law obligating various levels of Government to map culture and creative industries.

2.1.2 International Legal Framework

At the international level, Uganda is signatory to the Universal Declaration of Human Rights (UDHR), the International Covenant on Economic, Social and Cultural Rights (ICESCR) which it ratified in 1987, the 1972 Convention on World Natural and Cultural Heritage and the 2003 Convention on the Safeguarding of the Intangible Cultural Heritage.

Article 27 of the Universal Declaration of Human Rights (UDHR) and Article 15 of the ICESCR provide for the recognition of everyone's right to freely participate in cultural life while the 1972 and

2003 Conventions provide for the safeguarding of tangible and intangible cultural heritage respectively.

The 2003 Convention addresses five areas including; oral traditions, performing practices, social practices, knowledge about nature and traditional craftsmanship. Currently, Uganda is carrying out inventorying of intangible cultural heritage as one way of mapping these activities. A Strategy to guide the inventorying has been developed.

2.2 The National Policy Framework

2.2.1 The Uganda National Culture Policy

The Uganda National Culture Policy provides for the promotion, recognition, development and integration of culture in all activities and programmes of Government. It prioritizes the cultural industries and provides interventions for their promotion and development. The other policies of relevance to culture are the Health Policy (1999) which provides for the promotion of traditional medicine and the Education Policy provides for teaching in local languages at lower primary school level.

2.2.2 Plans

The plans and programmes that support the Uganda National Culture Policy include but are not limited to: the Vision 2040 which recognizes culture as a basic block for national identity and cohesion. The others are; the National Development Plan (NDP 2010/11-2014/15), the Social Development Sector Strategic Investment Plan (2011-2015), the Ministry of Gender, Labour and Social Development Sector Strategic Plan for Statistics (2006/07-2010/11) and the National Export Strategy (NES 2008/2012) among others.

All these Plans present opportunities for cultural industries. For instance, the National Development Plan proposes the promotion of positive cultural values, norms and practices, provides for interventions such as establishment of cultural centres, re-developing the national museum, promoting and development of the film industry, visual arts and performing arts, indigenous knowledge, recognition and supporting of local artisans. The NDP highlights the absence of statistical information as a constraint to the development of culture. This study will contribute to the provision of statistical information.

2.3 The Institutional Structure

There are various public institutions that promote and develop culture. These include; the Ministry of Gender, Labour and Social Development which is mandated to promote culture and the Ministry of Tourism, Wildlife and Antiquities which is mandated with cultural sites and built heritage. Other Ministries include; the Ministry of Education and Sports, the Ministry of Information, Communication and Technology, the Ministry of Health, the Ministry of Justice and Constitutional Affairs. The relevant agencies include; the Uganda National Cultural Centre, the National Library of Uganda, the Uganda Museum and the Uganda Registration Services Bureau. The district local governments are also mandated to develop and implement culture programmes. All these institutions provide a conducive environment for the promotion of culture and creative industries.

In the implementation of their mandates, various institutions have carried out mapping of culture industries at varying degrees. For instance, the Ministry of Gender Labour and Social Development Statistical Abstract 2009/10 highlights some aspects of culture including the location and distribution of the ethnic minorities, reading culture in Uganda, culture of listening to music, religion, the traditional institutions, culture officers and culture practitioners. Although it is not comprehensive, it is an attempt at mapping culture industries.

Furthermore, the Ministry of Gender, Labour and Social Development and the Ministry of Tourism, Wildlife and Antiquities guided by the 2003 Convention on the Safeguarding of the Intangible Cultural Heritage has carried out some interventions. These include; the mapping of Tangible and Intangible Cultural Heritage carried out by the Uganda Museum in 2007 and the inventorying of Intangible Cultural Heritage of the Basoga carried out by the Ministry of Gender, Labour and Social Development in 2010. Inventorying on a smaller scale has been done among the Batagwenda, Banyoro, Batuku, Langi and Madi communities. The Ministry is also carrying out inventorying of intangible cultural heritage among the Acholi, Alur, Ik and Basongora. Furthermore, the Ministry of

Tourism, Wildlife and Antiquities has compiled a list of cultural sites all over the country. In addition, Makerere University has an audio – visual archive of Ugandan music.

The Uganda Bureau of Statistics in its 2012 Uganda Population and Housing Census under Census mapping Form 3 identified Features Point Locations such as historical sites, cultural sites, video halls and sports grounds. It also included some aspects of culture in the 2009/2010 Uganda Household Demographic survey. This has enhanced the mapping of cultural activities in the country.

2.4 The Creative and Culture Industry in Uganda

2.4.1 Trade in creative and cultural products

The creative and culture industries include; the artisan products, the performing arts, the visual arts, cinema and audio visual, the multimedia, books and publishing, music, museums and heritage sites and traditional knowledge.

The Mapping of Cultural Industries (UNATCOM report 2009/10) indicates that there are more than 10,000 creative enterprises in Uganda. Over 45% of creative enterprises are located in the central region close to urban centres with dense population or close to main transport routes. Close to 60% are located in Kampala the capital city of Uganda. The book and publishing, cinema and audio visual and multimedia are predominantly urban.

The UNATCOM study further indicates that about 250,000 people are employed in the sector. The average employment ranges between 1-5 persons for over 80% of the creative enterprises. Between 2004 - 2008, Uganda exported cultural goods and services worth US$239,095,546 approximately Ug.shs.427.27 billion (UBOS: 2009). In the same period, imports of cultural goods and services were approximately US$600 million an equivalent of Ug.Shs.1.17 trillion. Thus exports of creative goods and services are less than what the country imports (URA 2009) showing unfavorable balance of trade. Export is high in museum and heritage sites (35%) because the sector depends on tourists, followed by artisan products (16%), multimedia (14%), visual arts (11%) and music (10%).The market of Uganda products is mainly North America, United Kingdom, Germany, France and Australia followed by the regional markets of EAC and COMESA.

In terms of tax revenue, creative goods and services contributed Ug. Shs.12.6 billion (US$6.7million) between 2006 -2009, and import duty alone contributed Ug. Shs. (Shs.) 8.6 billion (US$ 4.5 million).

2.4.2 Contribution of Creative Industries to employment

According to the UNATCOM Study of 2009 , books and publishing accounted for a higher percentage of employment contributing 34% compared to other clusters. It was followed by cinema and audio visual, artisan, music, museum and heritage. The sectors employing the highest number of people between 30 – 50 were the television and radio broadcast, cinema and audio visual media.

For books and publishing, 40% of enterprises were employing over 100 people and more while those with a few (20%) such as digital printing was employing less than 10 persons. Music enterprises in Uganda employ fewer than 10 people for over 90% of enterprises. Most musicians are sole artists. 75% of music enterprises employ between 1-10 persons, 16.7% employ between 11-30 people while a few 8.3% employ 31-100 persons. The museums and heritage sites employ between 1-10 people per enterprise for over 90% of the enterprises.

2.5 Challenges in the Culture and Creative Industry

Challenges in the development of the culture and creative industry in Uganda include; limited capacity of stakeholders in terms of skills, knowledge and marketing, absence of infrastructure for capacity building and limited financial support. These challenges affect the marketability and competitiveness of culture and creative goods and services.

Furthermore, there is inadequate protection for intellectual property rights relating to culture and its products. Whereas excellent legislation exists, enforcement is inadequate. Piracy of intellectual work is one of the greatest challenges facing the sub-sectors of music, theatre and film. In addition, mechanisms to counter cyber-piracy are not well developed and enforced. This makes the creative industries less profitable to those who invest their knowledge and capital to produce creative goods and services (UNATCOM 2009/10).

The expansion of new technologies has made the flow of ideas, opinions, information and movement of creative goods smoother and more prevalent. However, limited market penetration to the rich western countries and poor infrastructure in the domestic economy limit the sectors growth. These are compounded by the challenges on the supply side.

The other challenges include; limited design, packaging, pricing, promotion and distribution networks as well as the inability to adapt artistic creations and 'cultural' goods to the characteristics of demand in industrialized countries and to the evolving demand in domestic markets.

CHAPTER THREE
SURVEY RESULTS

3.1 Introduction

This chapter presents the findings of the Survey. It presents the characteristics of the institutions and individuals, the findings on the economic performance of the cultural and creative institutions as well as the collection and use of culture related statistics.

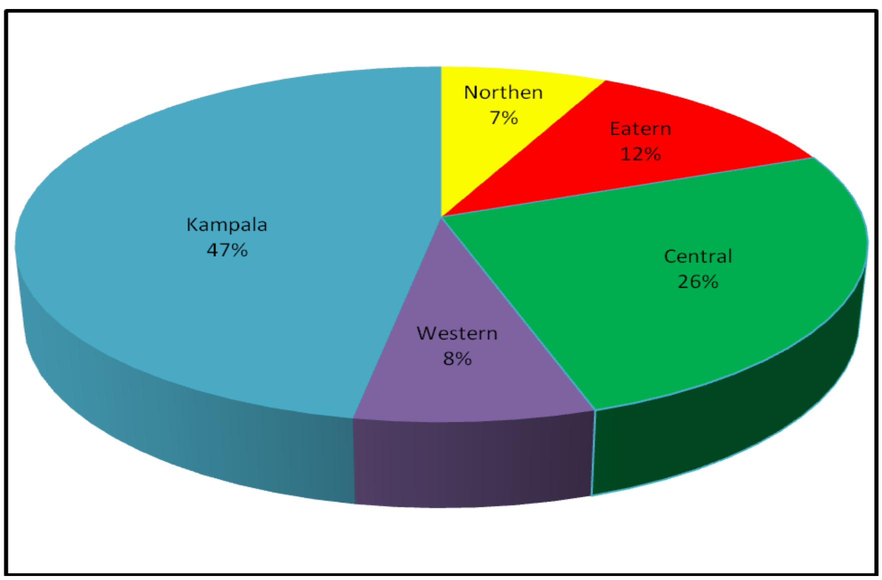
3.2 Volume and Distribution of Cultural and Creative Institutions

The discipline of cultural and creative industries is quite diverse and there is no single source of information on all institutions involved in the industry. This section presents information from various sources on the number and distribution of institutions in the culture sector.

3.2.1 Distribution of Cultural and Creative Institutions

The Census of Business Establishments (COBE) registered a total of 12,472 institutions involved in the cultural and creative industries. Figure 3.1 presents the regional distribution of cultural and creative institutions. Kampala Capital City has almost half (47%) of the institutions followed by Central region (26%) while Northern region had the lowest share (7%).

Figure 3. 1: Percent distribution of cultural and creative institutions by region



Source: COBE 2010/11

Table 3.1 below shows the regional distribution of institutions in the cultural and creative industries by domain. Generally, across most domains, Kampala Capital City had a higher percentage of institutions than other regions apart from Intangible Cultural Heritage and Sports and Recreation where Central region had higher percentages (71% and 49% respectively).

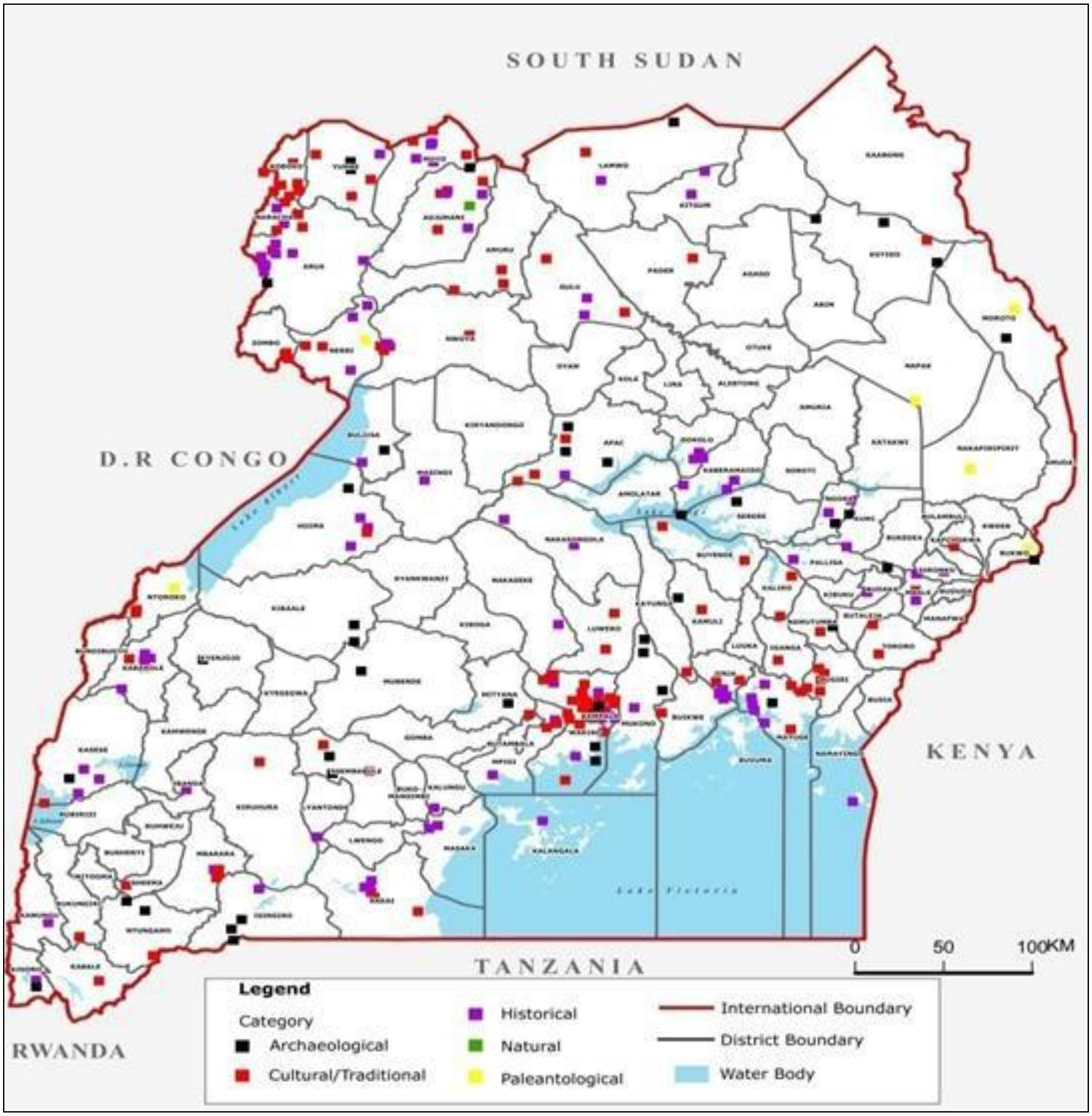
Table 2 : Distribution of cultural and creative industries by domain and region

	Region						
Domain	**Kampala**	**Central**	**Eastern**	**Northern**	**Western**	**Total**	**Freq.**
Cultural and Natural Heritage	33.3	38.9	0.0	0.0	27.8	**100.0**	**31**
Books and Press	63.9	11.5	8.2	6.6	9.8	**100.0**	**2,597**
Performing Arts and Celebration	65.0	25.0	0.0	0.0	10.0	**100.0**	**23**
Visual Arts and Craft	37.3	33.9	13.6	3.4	11.9	**100.0**	**2,088**
Audio-visual and inter-active media	41.8	26.2	16.4	11.5	4.1	**100.0**	**4,850**
Design and Creative Services	57.9	21.1	9.2	5.3	6.6	**100.0**	**1,727**
Culture and Tourism	57.1	17.1	5.7	0.0	20.0	**100.0**	**151**
Intangible Cultural Heritage	28.6	71.4	0.0	0.0	0.0	**100.0**	**206**
Sports and Recreation	30.2	48.8	2.3	2.3	16.3	**100.0**	**800**
Total	**47.1**	**25.8**	**11.8**	**7.3**	**7.9**	**100.0**	**12,472**

Source: COBE 2010/11

The Uganda Museum conducted a study that mapped the distribution of historical sites. The map in Figure 3.2 below shows the geographical distribution of the sites.

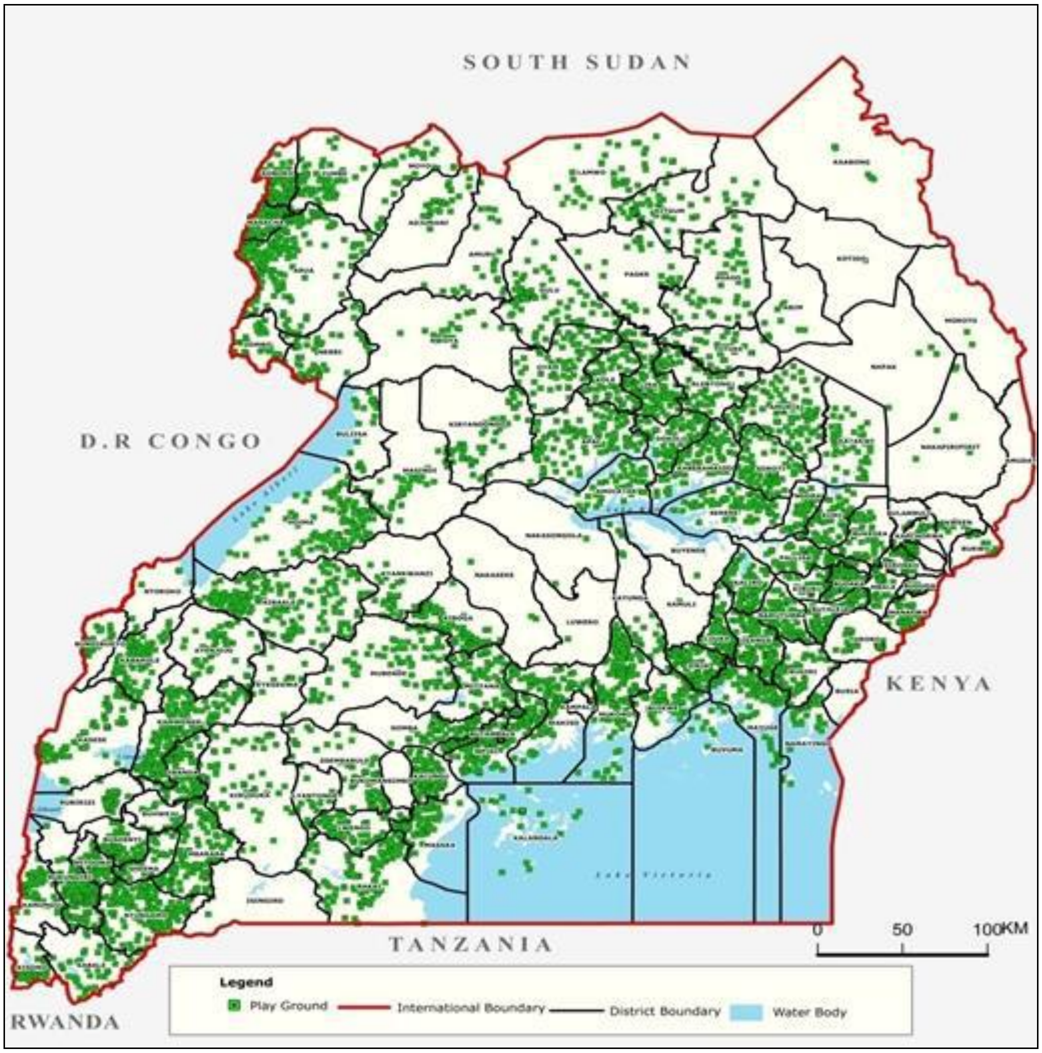
Figure 3. 2: **Map of Uganda showing distribution of Historical / Cultural Sites**



Source: Uganda Museum

As part of the preparations for the 2014 National Population and Housing Census, the Uganda Bureau of Statistics (UBOS) undertook a mapping exercise which captured the geo-locations of Historical/Cultural sites in the country. The mapping exercise revealed a total of 7,189 sites. Of these, 5,437 were Sports and Recreation centers distributed as shown in Figure 3.3 below.

Figure 3. 3: Map of Uganda showing distribution of Sports/Recreation Sites



Source: UBOS

3.3 Characteristics of Institutions

The Survey collected information on characteristics of institutions such as regional distribution by domain, age of institutions, and registration status of institutions as well as category of registration for those institutions that were registered. This section presents the findings.

3.3.1 Age of institutions in the Cultural and Creative Industries

The Mapping of Cultural and Creative Industries Survey collected information on how long a particular institution had been in existence. Table 3.2 shows that, overall, the highest percentage had been in existence for between 5 and 9 years (34%) followed by those less than 4 years (23%). This indicates that more than half of the institutions (57%) have been in existence for less than a decade. The domains with the highest proportions of institutions that had existed for 20 or more years were Cultural and Natural Heritage (61%) followed by Intangible Cultural Heritage (43%) and Performing Arts and Celebration (35%). On the other hand, Sports and Recreation domain had the highest proportion of institutions that had existed for less than 4 years (37%) followed by Audio-Visual and Interactive Media (24%).

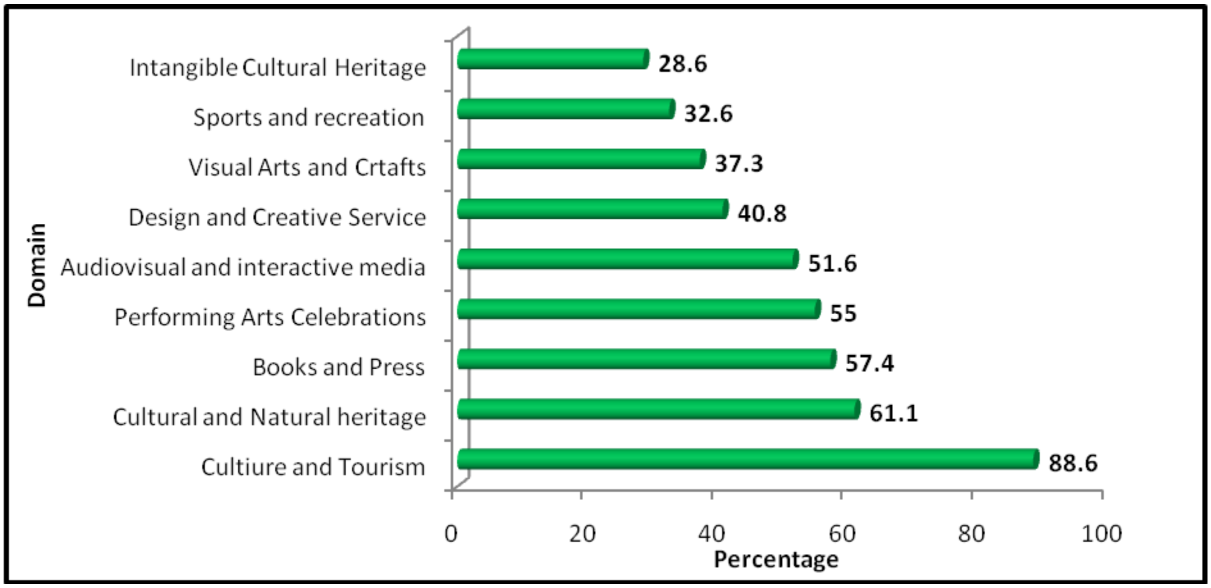
Table 3 : Distribution of cultural institutions by age of institution and domain

	Period of existence						
Domain	**0 - 4 Years**	**5 - 9 Years**	**10 - 14 Years**	**15 - 19 Years**	**20+ Years**	**Total**	**Median Age**
Cultural and Natural Heritage	5.6	22.2	11.1	0.0	61.1	**100.0**	**21.5**
Books and Press	14.8	32.8	14.8	11.5	26.2	**100.0**	**11.0**
Performing Arts and Celebration	10.0	30.0	15.0	10.0	35.0	**100.0**	**13.0**
Visual Arts and Craft	23.7	30.5	17.0	13.6	15.3	**100.0**	**9.0**
Audio-visual and inter-active media	27.1	38.5	18.9	11.5	4.1	**100.0**	**7.0**
Design and Creative Services	19.7	22.4	21.1	11.8	25.0	**100.0**	**10.0**
Culture and Tourism	11.4	48.6	20.0	11.4	8.6	**100.0**	**9.0**
Intangible Cultural Heritage	0.0	42.9	14.3	0.0	42.9	**100.0**	**10.0**
Sports and Recreation	37.2	32.6	14.0	4.7	11.6	**100.0**	**6.0**
Total	**22.9**	**33.5**	**17.6**	**11.2**	**14.8**	**100.0**	**8.0**

3.3.2 Registration Status of Institutions

The survey collected information on the registration status of institutions and the findings are presented in Figure 3.4 below. The findings show that about half (48%) of the institutions in the culture and creative industries were formally registered. Institutions in the Culture and Tourism domain were more likely to be registered (89%) while institutions in the Intangible Cultural Heritage domain were least likely to be registered (29%).

Figure 3. 4: Percent distribution of institutions by registration status and domain



For those institutions that were reported to be registered, information was collected on the category of registration. Table 3.3 below shows the distribution of registered institutions by category of registration disaggregated by domain of cultural specific activity.

Table 4: Distribution institutions by category of registration and domain

	Domain									
Category of registration	**Cultural and Natural Heritage**	**Books and Press**	**Performing Arts and Celebration**	**Visual Arts and Craft**	**Audio-visual and inter-active media**	**Design and Creative Services**	**Culture and Tourism**	**Intangible Cultural Heritage**	**Sports and Recreation**	**Total**
Sole proprietorship	9.1	17.1	20.0	28.6	16.7	12.9	10.3	0.0	8.3	17.2
Partnership	9.1	20.0	10.0	14.3	15.0	9.7	0.0	0.0	8.3	14.8
Private company	45.5	54.3	30.0	47.6	63.3	64.5	79.3	100.0	75.0	60.2
Public company	0.0	2.9	0.0	4.8	1.7	0.0	3.5	0.0	0.0	2.1
Gov't Ministries	0.0	2.9	0.0	0.0	3.3	0.0	3.5	0.0	8.3	2.5
Others	36.4	2.9	40.0	4.8	0.0	12.9	3.5	0.0	0.0	3.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**19**	**1,490**	**12**	**743**	**2,385**	**704**	**125**	**59**	**223**	**5,760**

The majority (60%) of registered culture and creative institutions were private companies followed by sole proprietors (17%) and private partnerships (15%). These three categories accounted for over 90 percent of the registered culture and creative institutions. The distribution by domain shows the same pattern as the overall except in the case of Performing Arts and Celebrations. However, the level of domination by private companies showed wide variations by domain with 100 percent of institutions in the Intangible Cultural Heritage domain being private companies while it was only 30 percent among institutions in the Performing Arts and Celebration domain.

3.4 Volume and Distribution of Cultural Institutions

This section presents information from various sources on the number and distribution of individuals in the culture and creative industries.

3.4.1 Size and Distribution of Individuals in Cultural and Creative Industries

The Uganda National Labour force and Child Activities Survey 2011/12 (UNLF &CAS 2011/12) collected information on all persons employed by type of employment. The Survey realized a total of 280,263 persons directly or indirectly engaged in cultural activities. Of these, 44 percent were males while the rest were females. Table 3.4 shows the distribution of population directly or indirectly engaged in cultural and creative industries by domain and sex. The findings reveal variations by sex of individuals. Whereas there were more males than females in Performing Arts and Celebration, Audiovisual and Interactive media, Intangible Cultural Heritage and Sports and Recreation domains, the females dominated the Cultural and Natural Heritage, Visual Arts and Craft, Design, and Creative Services, Books and Press domains.

Table 5 : Distribution of population engaged in cultural and creative industries by domain

Domain	Sex			
	Male	Female	Total	Freq.
Cultural and Natural Heritage	33.8	66.2	100.0	64,882
Performing Arts and Celebration	100.0	0.0	100.0	1,056
Visual Arts and Craft	36.8	63.2	100.0	13,850
Audiovisual and Interactive media	87.6	12.4	100.0	7,068
Design and Creative Services	32.8	67.2	100.0	108,971
Books and Press	45.6	54.4	100.0	19,422
Cultural Tourism	48.9	51.1	100.0	30,088
Intangible Cultural Heritage	83.4	16.6	100.0	22,973
Sports and Recreation	92.8	7.2	100.0	11,953
Total	**44.2**	**55.8**	**100.0**	**280,263**

Source: UNLF & CAS 2011/12

3.4.2 Age of Individuals in the Cultural and Creative Industries

Table 3.5 presents the age structure of the individuals involved in cultural and creative industries from the UNLF & CAS. The ages have been grouped for ease of presentation. Overall, as shown in Table 3.5 below, more than half of the individuals in cultural and creative industries (51%) were in the age group 31 years and above while only six percent were in the age group 14 – 17 years. Variations in the distribution of individuals by age group were observed. The 18 – 30 years age group was dominant in the domains of Performing Arts and Celebration, Audiovisual and Interactive media, Design and Creative Services, Books and Press, Cultural Tourism, Sports and Recreation. On the other hand, persons in the age group 31 and above were dominant in the domains of Cultural and Natural Heritage and Intangible Cultural Heritage.

Table 6 : Distribution of individuals in cultural and creative industries by age

Domain	Age groups			Total	Freq.
	14-17	18-30	31+		
Cultural and Natural Heritage	14.9	18.2	66.9	100.0	64,882
Performing Arts and Celebration	0.0	100.0	0.0	100.0	1,056
Visual Arts and Craft	11.1	44.3	44.6	100.0	13,850
Audiovisual and Interactive media	0.0	95.9	4.1	100.0	7,068
Design and Creative Services	3.5	52.4	44.1	100.0	108,971
Books and Press	2.7	56.1	41.1	100.0	19,422
Cultural Tourism	4.8	53.0	42.2	100.0	30,088
Intangible Cultural Heritage	2.6	4.1	93.2	100.0	22,973
Sports and Recreation	2.7	64.4	32.9	100.0	11,953
Total	**6.4**	**42.3**	**51.4**	**100.0**	**280,263**

Source: UNLF & CAS 2011/12

3.4.3 Education Level

The highest level of education attained by the individual respondents is presented in Table 3.6 below. Overall, 18 percent of individuals had received above secondary level of education. About 25 percent had secondary level of education while the majority (45%) had primary level education. Twelve percent never had any formal schooling. Wide disparities were observed between the domains. Performing Arts and Celebration domain had the highest percentage of individuals with above secondary level education (42%) while Cultural and Natural Heritage had the lowest (2%).

Table 7 : Distribution of individuals by highest education level and domain

	Education Level					
Domain	**No formal schooling**	**Primary**	**Secondary**	**Above secondary**	**Total**	**Freq.**
Cultural and Natural Heritage	28.7	60.9	8.7	1.8	100.0	64,882
Performing Arts and Celebration	0.0	0.0	57.8	42.2	100.0	1,056
Visual Arts and Craft	14.0	24.5	51.1	10.5	100.0	13,850
Audiovisual and Interactive media	0.0	0.0	78.6	21.4	100.0	7,068
Design and Creative Services	2.9	45.9	21.8	29.4	100.0	108,096
Books and Press	0.0	32.4	39.1	28.5	100.0	19,422
Cultural Tourism	6.3	33.2	41.7	18.9	100.0	30,088
Intangible Cultural Heritage	40.9	41.8	10.7	6.7	100.0	22,973
Sports and Recreation	0.0	64.1	28.1	7.8	100.0	11,953
Total	12.5	45.1	24.5	17.9	100.0	279,387

Source: UNLF & CAS 2011/12

3.5 Characteristics of Individuals in Cultural and Creative Industries

The Mapping of Cultural and Creative Industries Survey collected information from a total of 129 individuals involved in cultural and creative industries. The information collected included duration of stay in the domain of activity, skills and training in culture among others.

3.5.1 Main Cultural Productive /Economic Activity

The Survey solicited information on what they considered as their main cultural productive/economic activity. The domains surveyed included Cultural and Natural heritage, Books and Press, Performing Arts and Celebration, Visual Arts and Craft, Audiovisual and Interactive Media, Design and Creative Services, Cultural Tourism and Intangible Cultural Heritage domain. The findings are given in Table 3.7 below.

Table 3.7 shows the highest percentage on the overall were engaged in the Books and Press domain (22%) followed by Audiovisual and Interactive Media (21%). Only one percent engaged in the Cultural Tourism domain. The level of participation showed significant variations by sex. Whereas more than half the males were in Audiovisual, Culture and Intangible Heritage, the majority of females were in Design and Creative Services, Books and Press, Audiovisual and Interactive Media domains.

Table 8 : Distribution of individuals by domain and sex

	Sex		
Domain	**Male**	**Female**	**Total**
Cultural and Natural Heritage	18.4	9.5	13.4
Books and Press	4.1	36.5	22.3
Performing Arts and Celebration	8.2	6.4	7.1
Visual Arts and Craft	8.2	17.5	13.4
Audiovisual and Interactive Media	36.7	7.9	20.5
Design and Creative Services	6.1	15.9	11.6
Culture Tourism	0.0	1.6	0.9
Intangible Cultural Heritage	18.4	3.2	9.8
Other	0.0	1.6	0.9
Total	**100.0**	**100.0**	**100.0**

3.5.2 Duration of Service in the Cultural and Creative Industries

Table 3.8 below shows the distribution of individuals by length of service in cultural specific activities. Overall, slightly more than a quarter of individuals (26%) had worked for 0 – 4 years followed by 23 percent who had worked for 5 – 9 years. This indicates that about half of the individuals had worked for less than a decade. Variation in the duration of service by sex of individuals was observed. A higher percentage of males (58%) had worked for 10 or more years compared to females (50%).

Table 9: Distribution of individuals by length of service in cultural specific activities

	Sex		
Length of service	Male	Female	Total
0 - 4 Years	19.0	32.4	26.4
5 - 9 Years	22.4	23.9	23.3
10 -14Years	24.1	18.3	20.9
15 - 19 Years	10.3	8.5	9.3
20+ Years	24.1	16.9	20.2
Total	**100.0**	**100.0**	**100.0**

3.5.3 Number of Working Hours

Individual respondents were asked how much of their working time they spent on their main activities daily. Table 3.9 below shows the distribution of respondents by daily working time and sex. Overall, half the individuals worked for 8 or more hours daily while only eight percent worked less than 3 hours daily. Wide variations are observed in the number of hours worked by sex. The Males worked for more than 8 hours (60%) compared to females (40%). On the contrary, a higher percentage of females worked less than 3 hours (11%) compared to their male counterparts (4%).

Table 10 : Distribution of respondents by daily working time and sex

	Sex				Total	
	Male		Female			
Daily working time (Hours)	Freq.	%	Freq.	%	Freq.	%
Less than 3 hours	2	3.5	7	11.3	9	7.6
3-less than 6 hours	2	3.5	12	19.4	14	11.8
6-8 hours	19	33.3	18	29.0	37	31.1
Above 8 hours	34	59.7	25	40.3	59	49.6
Total	**57**	**100.0**	**62**	**100.0**	**119**	**100.0**

3.5.4 Formal Training in a Cultural and Creative Fields

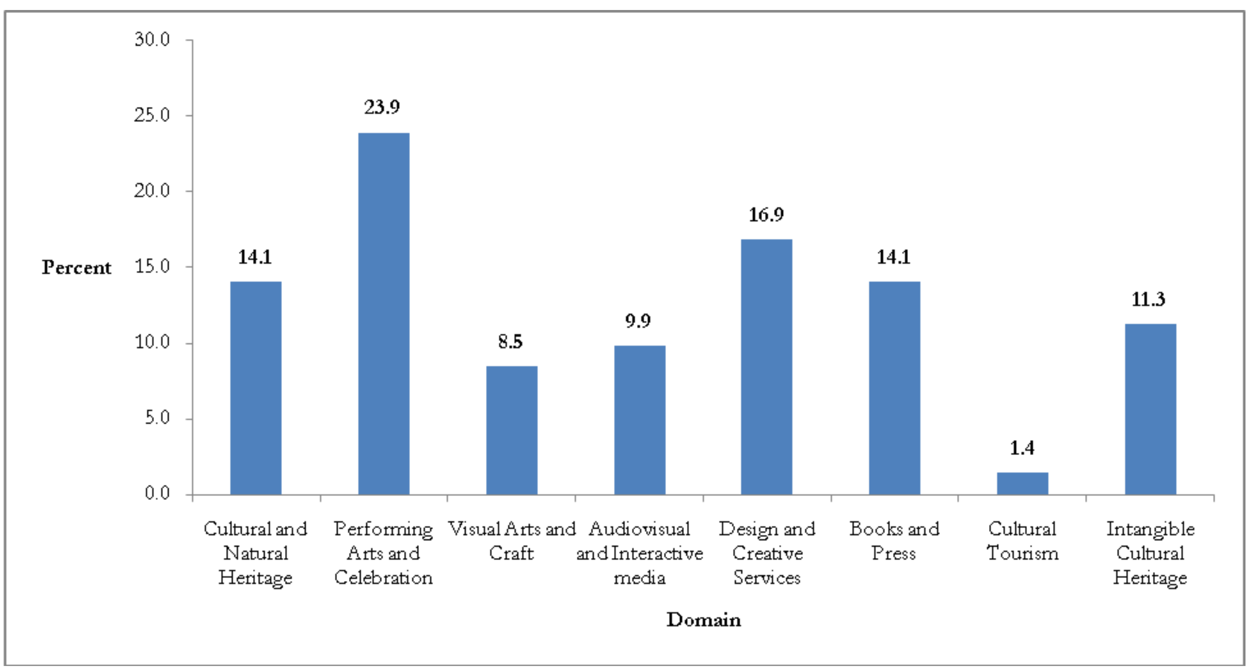
Respondents were asked about formal training in the cultural and creative field and their highest level of qualification relevant to the cultural field. Out of the 129 individuals surveyed, only 74 (57%) had formal training in cultural and creative fields. Of these, 38 percent were males while 62 percent were females. Table 3.10 shows the distribution of individual respondents who had undergone formal training relevant for the cultural specific activities they engaged in. Fifty eight percent had received certificate level training in the cultural fields while about one third (32%) had degrees and above. A higher percentage of females (46%) had degrees and above than males (11%).

Table 11: Distribution of individuals with formal training in culture

	Sex					
	Male		Female		Total	
Highest level of formal	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Certificate	23	82.1	20	43.5	43	58.1
Diploma	1	3.6	3	6.5	4	5.4
Degree and above	3	10.7	21	45.7	24	32.4
Other	1	3.6	2	4.4	3	4.1
Total	**28**	**100.0**	**46**	**100.0**	**74**	**100.0**

Figure 3.5 shows the distribution of individuals who had formal training in cultural specific activities by domain. Of the individuals who had formal training about a quarter (24%) were in Performing Arts and Celebration domain followed by Design and Creative Services domain (17%). The lowest percentage was in Cultural Tourism domain (1%).

Table 12 : Distribution of individuals with formal training in culture by domain



3.5.5 Skill Acquisition

Individual respondents who did not have any formal training in cultural specific activities were asked how they acquired their skills. As shown in Table 3.11, overall, of the individuals who did not have any formal training in cultural specific activities, 58 percent acquired the required skills through self-training while 29 percent acquired skills through apprenticeship training. Three quarters of the females (76%) acquired the skills through self-training compared to 43 percent of males.

Table 13 : Distribution of individuals by method of skills acquisition

	Sex					
	Male		Female		Total	
Method of skill acquisition	**Freq.**	**%**	**Freq.**	**%**	**Freq.**	**%**
Self-training	13	43.3	19	76.0	32	58.2
Apprenticeship	14	46.7	2	8.0	16	29.1
Traditional cultural	2	6.7	2	8.0	4	7.3
Other	1	3.3	2	8.0	3	5.5
Total	**30**	**100.0**	**25**	**100.0**	**55**	**100.0**

3.6 Economic Performance of the Cultural and Creative Institutions and Individuals

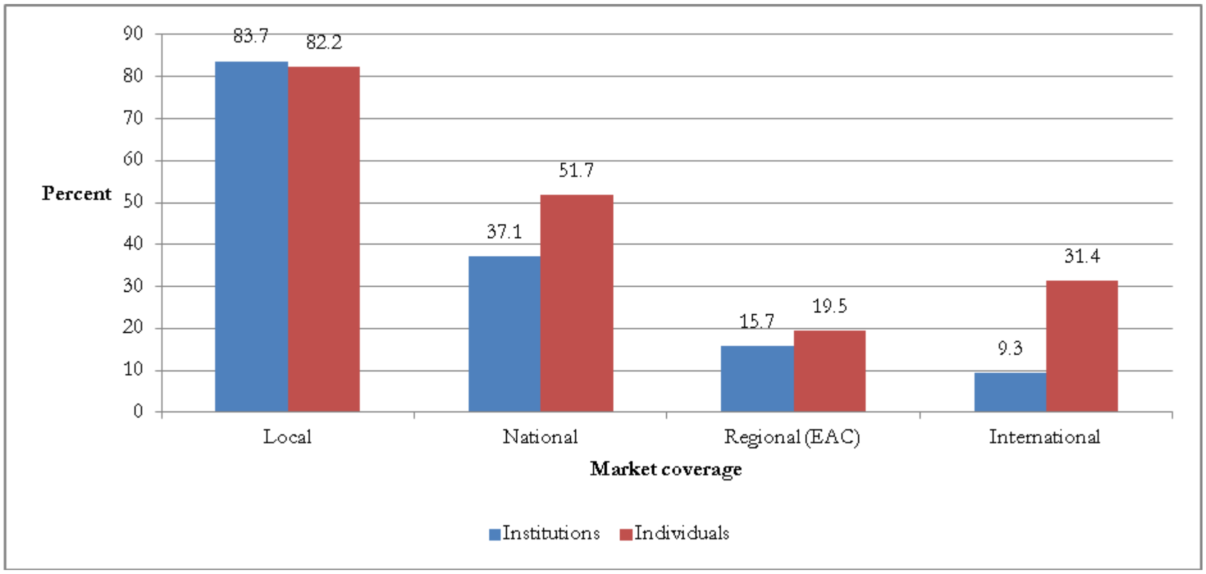
This section presents the findings on the economic performance of institutions and individuals in cultural and creative industries. It includes market coverage, revenues from external trade in cultural specific activities, gross revenues from both local and foreign trade as well as expenditures in the financial year prior to the Survey.

3.6.1 Market Coverage of Cultural Specific Activities

The Survey collected information about the market coverage of the culture specific activities that institutions and individuals were engaged in. Market coverage is defined as local if the product/service is only sold within the area where the institution is located and national if the products/services are sold throughout the country. The question provided for multiple responses hence the percentages presented are expressed relative to the number of institutions/individuals responding to the question.

Figure 3.6 below presents the distribution of institutions and individuals by market coverage of cultural specific activities. For both institutions and individuals, the majority (over 80%) reported local market coverage for their culture specific activities with institutions reporting a slightly higher percentage (84%) than individuals (82%). Apart from the local market, a fairly higher percentage of individuals than institutions reported trading in other markets (52% and 37% respectively. The international market is very low especially in institutions (9%).

Figure 3. 5: Distribution by market coverage of cultural specific activities

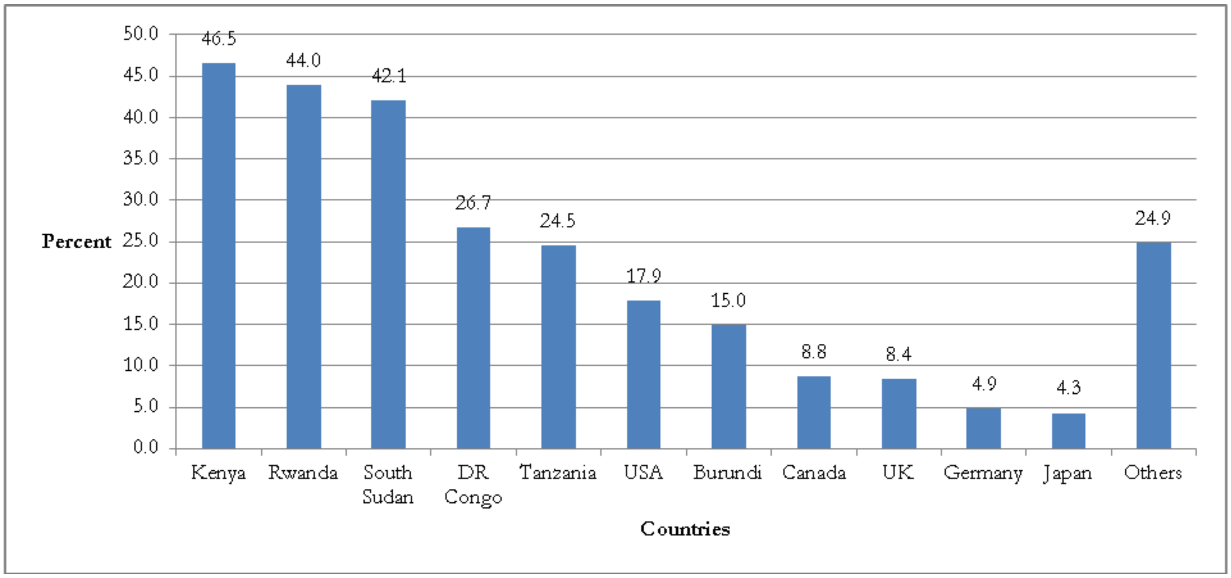


Note: The question provided for multiple responses thus the resulting percentages do not add up to 100.

3.6.2 External Markets

Culture and creative industries institutions that reported access to regional/international markets for their activities were asked to name which countries they sold their cultural activities/products to. Figure 3.7 below shows the percent distribution of institutions with external market by country. Kenya was the main market for institutions involved in culture and creative industries (47%) followed by Rwanda (44%) and South Sudan (42%). The figure shows that the market for cultural activities/products is predominantly within the East African Community region.

Figure 3. 6: Distribution of institutions by external markets



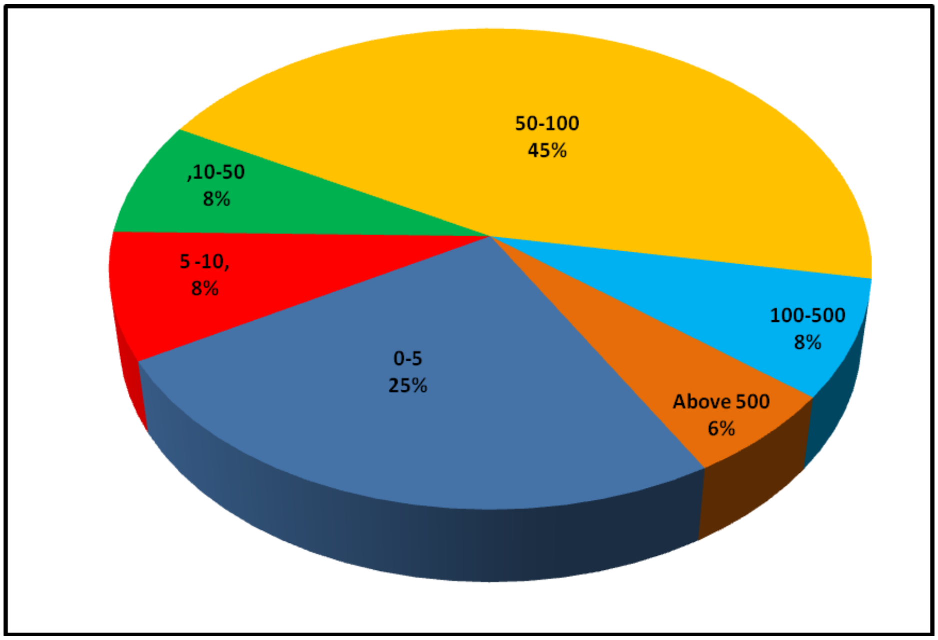
Note: The question was a multiple response one hence percentages presented do not add up to 100. Percentages are expressed relative to the total number of institutions responding to the question

3.6.3 Revenue from Foreign Sales in the Previous Financial Year

Information was sought from culture and creative institutions that had external markets about their total revenue from foreign sales in the previous financial year (July 2011 – June 2012). To obtain revenue figures, respondents were asked which category their revenue fell in. Revenue figures were grouped into six categories ranging from US$ 0 – 5,000 to above US$ 500,000. The results are presented in Figure 3.8 below.

Overall, 42 percent of institutions had less than US$ 5,000 as the estimated total revenues from foreign sales followed by those in the category US$ 5,001 to 10,000 (14%). The institutions in the revenue category US$ 50,001 to 100,000 had the lowest share of the total revenue from foreign sales (8%). There are wide variations in the revenue structure by domain.

Figure 3. 7: Distribution of Institutions by gross revenue from foreign sales (US$ '000)

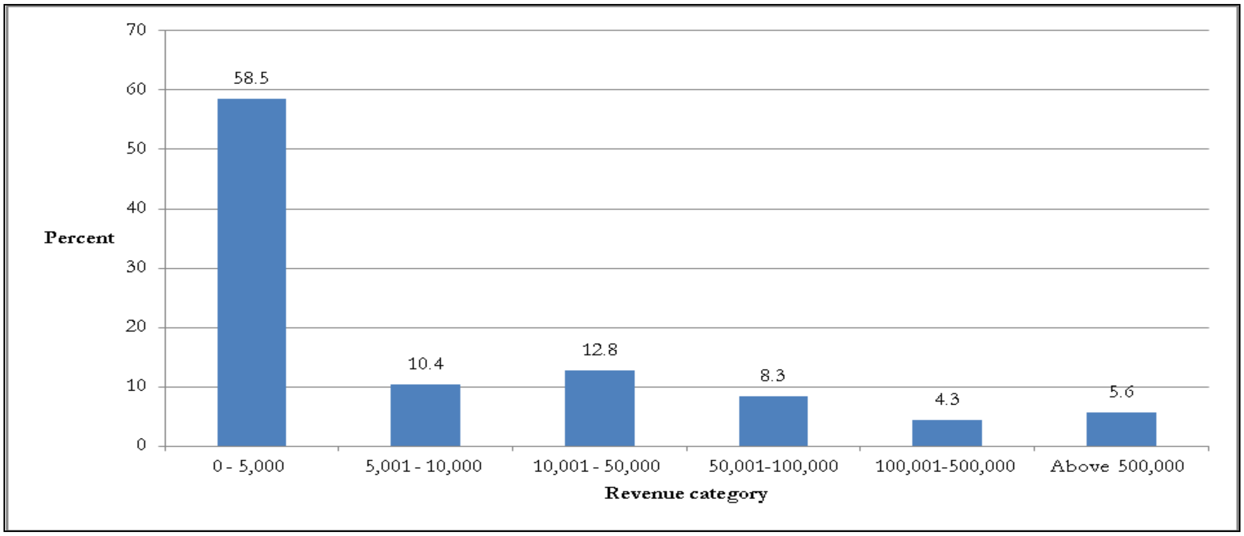


3.6.4 Gross Revenues

The Survey collected information from institutions on estimated total revenue from both local and foreign sales in the previous financial year prior to the survey (July 2011 – June 2012). The responses were classified into six categories ranging from US$ 0 to 5,000, to above US$ 500,000. Figure 3.9 presents the distribution of institutions by gross revenue categories. The distribution by domain is also given in Table 3.12.

Overall, about 6 in every 10 institutions (59%) had gross revenues/incomes not exceeding US$ 5,000. The general trend is a decline in the share levels as the income levels increased. Only six percent of institutions had gross revenues/incomes in excess of US$ 500,000.

Figure 3. 8: Distribution of institutions by gross revenue categories



The same pattern is observed by domain in Table 3.12 except in the Culture and Tourism domain which had a fairly spread distribution across revenue categories. The institutions in the Sports and Recreation domain had the highest percentage of institutions with gross revenues not exceeding US$ 5,000 (73%) followed by Visual Arts and Craft (68%) and Design and Creative Services (60%). Books and Press domain had the highest percentage of institutions with gross revenues in excess of US$ 500,000 (15%) followed by Sports and Recreation domain (8%).

Table 14 : Distribution of institutions by gross revenue/income

	Domain									
Gross Revenue Category (US$)	Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Culture and Tourism	Intangible Cultural Heritage	Sports and Recreation	Total
0 - 5,000	52.9	45.5	46.7	68.4	58.9	60.3	23.1	57.1	72.5	58.5
5,001 - 10,000	5.9	12.7	13.3	15.8	7.1	11.0	26.9	0.0	7.5	10.4
10,001 - 50,000	29.4	12.7	13.3	8.8	15.2	9.6	23.1	28.6	10.0	12.8
50,001-100,000	5.9	7.3	6.7	1.8	12.5	8.2	11.5	14.3	2.5	8.3
100,001-500,000	0.0	7.3	20.0	5.3	2.7	5.5	11.5	0.0	0.0	4.3
Above 500,000	5.9	14.6	0.0	0.0	3.6	5.5	3.9	0.0	7.5	5.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**29**	**2,341**	**17**	**2,017**	**4,452**	**1,659**	**112**	**206**	**744**	**11,578**

3.6.5 Annual Budget/Expenditure on Culture Specific Activities

Estimated expenditure figures were obtained by asking institutions their estimated budget for cultural specific activities. The expenditure was grouped into six categories that ranged from US$ 0 – 5,000, US$5,001 – 10,000, US$ 10,001 – US$ 50,000 to above US$ 500,000. The distribution of institutions by estimated expenditure on cultural specific activities is shown in Table 3.13.

Overall, two thirds (67%) of institutions had estimated total annual expenditures on culture specific activities not exceeding US$ 5,000 in the last financial year prior to the survey. Only five percent of institutions had estimated total annual expenditures on culture specific activities in excess of US$ 500,000. Across all domains, the majority of the institutions had estimated annual expenditures not exceeding US$ 5,000 with Visual Arts and Craft and Sports and Recreation domains having the highest percentages of institutions (82 and 80% respectively). Considering individuals, the majority had estimated annual expenditures on culture specific activities in the last financial year prior to the Survey not exceeding US$ 5,000.

Table 15 : Distribution of institutions by annual expenditure on culture FY2011/12

	Domain									
Annual Expenditure Category (US$)	Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Sports and Recreation	Total
0 - 5,000	55.6	52.7	53.3	81.8	65.5	69.4	30.8	71.4	80.0	66.9
5,001 - 10,000	16.7	9.1	13.3	7.3	6.4	5.6	23.1	14.3	5.0	7.2
10,001 - 50,000	22.2	10.9	13.3	5.5	17.3	12.5	19.2	14.3	7.5	12.6
50,001 - 100,000	0.0	3.6	0.0	3.6	6.4	2.8	15.4	0.0	0.0	4.4
100,001-500,000	0.0	10.9	6.7	1.8	0.9	4.2	11.5	0.0	2.5	3.8
above 500,000	5.6	12.7	13.3	0.0	3.6	5.6	0.0	0.0	5.0	5.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**31**	**2,341**	**17**	**1,946**	**4,373**	**1,636**	**112**	**206**	**744**	**11,406**

3.6.6 Sources of Funding

The survey collected information from institutions as well as individuals on the sources of funding for culture specific activities. The question provided for multiple responses hence the percentages presented are expressed relative to the number of institutions/individuals responding to the question. The resulting percentages may total to more than 100 percent. The results are presented in Figure 3.10 and Table 3.13.

As shown in Figure 3.10, the majority of institutions and individuals (87% and 85% respectively) reported sales and performances as a major source of funding for their culture specific activities. There were some variations in the sources of funding between the institutions and individuals. Twenty three percent of institutions reported private fundraising compared to 15 percent of individuals. Conversely, sponsorships were cited as a source of funding by 20 percent of individuals compared to only seven percent for institutions.

Figure 3. 9: Distribution of institutions and individuals by source of funding

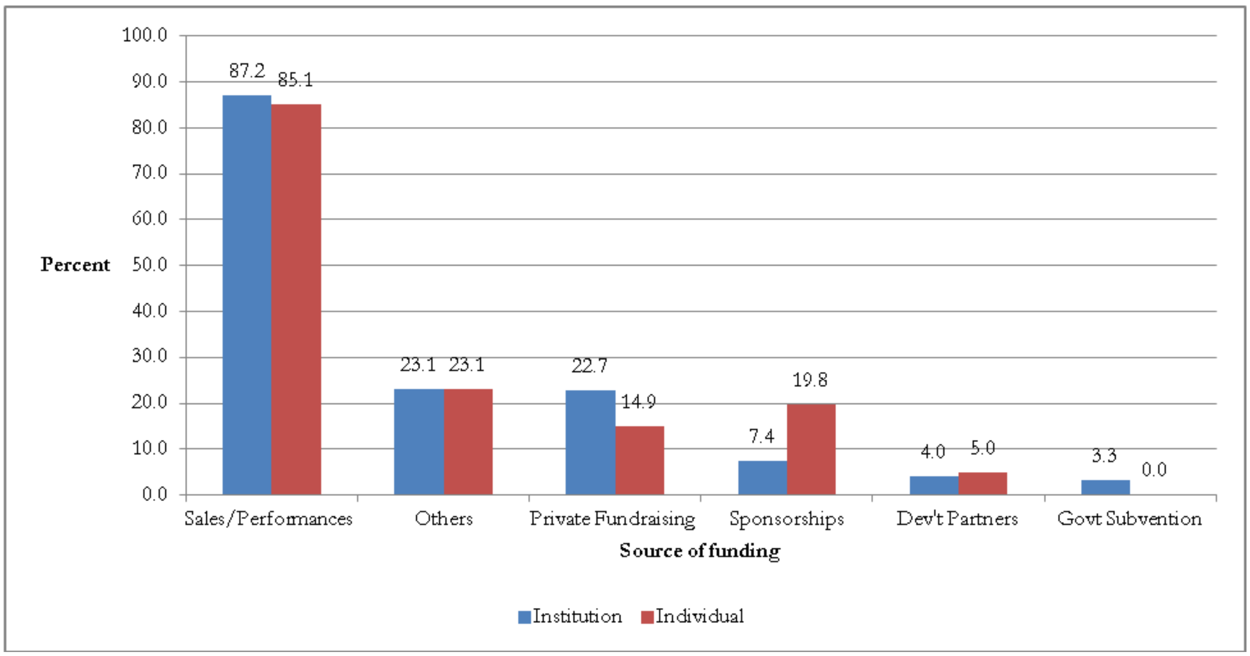


Table 3.14 below shows the distribution of institutions by source of funding for cultural productive/economic activities and domain. Over 80 percent of institutions in other domains cited sales/performances as a source of funding apart from Performing Arts and Celebration. There were variations in the distribution of institutions by sources of funding across the domains.

Table 16: Distribution of Institutions by sources and by domain

Source of funding	Domain: Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Sports and Recreation	Total
Gov't subvention	11.1	6.6	25.0	0.0	3.3	2.6	8.6	0	2.3	3.3
Private fundraising	27.8	23.0	35.0	23.7	24.6	19.7	17.1	14.3	16.3	22.7
Sales/ Performances	88.9	83.6	65.0	94.9	85.2	84.2	91.4	100.0	93.0	87.2
Sponsorships	16.7	6.6	20.0	3.4	11.5	5.3	5.7	0	2.3	7.4
Dev't. partners	11.1	4.9	5.0	0.0	4.9	5.3	8.6	0	2.3	4.0
Others	22.2	24.6	25.0	23.7	18.9	30.3	25.7	14.3	27.9	23.1
Freq.	**31**	**2,597**	**23**	**2,088**	**4,850**	**1727**	**151**	**206**	**800**	**12,472**

3.7 Employment in the Cultural Productive/Economic Activities

The Survey collected information on the number of employees in each institution undertaking cultural productive/economic activities and those providing support services in the last financial year prior to the Survey (July 2011 – June 2012). The employees were classified as permanent, temporary and volunteers. Each category was further divided into professional and non-professional. The results are presented below in Tables 3.15 and 3.16. Professionals are defined as those who have training in the area of culture and creative arts while the non-professional have no formal training in culture but may be qualified in other fields.

3.7.1 Total Number of Staff Undertaking Cultural Productive/Economic Activities

Figure 3.11 below presents the percentage of employees by category of employment disaggregated by domain. The Survey estimates about 148,371 persons are directly undertaking cultural productive activities. Of these about 104,278 (70%) are permanent employees, 32,971 (22%) are temporary employees while about 11,122 (8%) are volunteers.

Figure 3. 10: Distribution of employees by category of employment

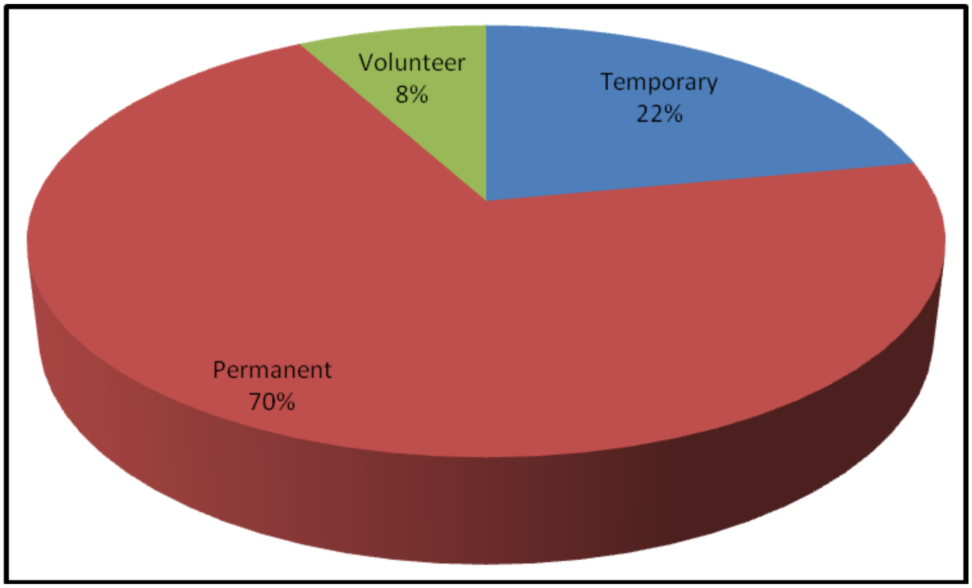


Table 3.15 below presents the number of employees undertaking cultural productive activities disaggregated by domain. The overall sex distribution of the 148,371 individuals indicates that 86,608 were male and 61,763 were female. Across all domains, there were more males than females. The widest variations were observed in the Visual Arts and Craft domain (11,219 males and 5,415 females) and Audiovisual and Interactive Media (30,250 males and 17,570 females).

Considering skill, 92,129 persons were professionals while 56,242 were non-professionals. Audiovisual and Interactive Media domain had the highest number of professionals (34,026) followed by Books and Press domain (22,714). Audiovisual and Interactive Media domain also had the highest number of non-professionals (13,794) followed by Books and Press domain (13,239).

Overall, 104,278 individuals were permanent employees, 32,971 were temporary while 11,122 were volunteers. The highest number of permanent employees was in the Audiovisual and Interactive Media domain (32,953) followed by Books and Press domain (30,352). There were variations by sex observed in the distribution of permanent employees. Across all domains, there were more male permanent employees compared to females apart from Design and Creative Services where females were more than males (7,384 females and 6,702 males respectively). There were more female temporary employees in Books and Press domain while in the other domains, male temporary employees outnumber females. Female volunteers outnumbered their male counterparts in Audiovisual and Interactive Media, Design and Creative Services, Sports and Recreation domains.

Table 17: Employees undertaking cultural productive/economic activities by characteristic

	Domain									
Characteristic	**Cultural and Natural Heritage**	**Books and Press**	**Perfor-ming Arts and Celebr-ation**	**Visual Arts and crafts**	**Audio-visual and Inter-active Media**	**Design and Creative Services**	**Cultural Tourism**	**Intangible Cultural Heritage**	**Sports and Recreation**	**Total**
Sex										
Males	225	22,903	455	11,219	30,250	13,791	1,535	3,031	3,199	86,608
Female	216	18,050	343	5,415	17,570	12,974	1,306	2,973	2,921	61,763
Skill										
Professional Male	88	15,283	196	5,167	20,272	8,270	1,082	1,648	1,618	53,625
Professional Female	76	12,431	148	2,725	13,754	6,794	758	1,354	465	38,504
Total Professional	**164**	**27,714**	**344**	**7,892**	**34,026**	**15,064**	**1,840**	**3,002**	**2,083**	**92,129**
Non-Professional Male	137	7,620	259	6,052	9,978	5,521	453	1,383	1,581	32,983
Non-Professional Female	140	5,619	195	2,690	3,816	6,180	548	1,619	2,456	23,259
Total Non-Professional	**277**	**13,239**	**454**	**8,742**	**13,794**	**11,701**	**1,001**	**3,002**	**4,037**	**56,242**
Category of Employee										
Permanent Male	124	17,964	249	8,671	22,777	6,702	1,366	2,943	2,362	63,159
Permanent Female	109	12,388	218	4,566	10,176	7,384	1,060	2,914	2,307	41,119
Total -Permanent	**233**	**30,352**	**467**	**13,237**	**32,953**	**14,086**	**2,426**	**5,857**	**4,669**	**104,278**
Temporary Male	87	4,087	118	2,371	4,651	6,862	134	59	651	19,020
Temporary Female	98	5,364	53	389	2,345	5,226	194	59	223	13,951
Total- Temporary	**185**	**9,451**	**171**	**2,760**	**6,996**	**12,088**	**328**	**118**	**874**	**32,971**
Volunteer Male	14	852	88	177	2,822	227	35	29	186	4,429
Volunteer Female	9	298	72	460	5,049	364	52	-	391	6,693
Total Volunteer	**23**	**1,150**	**160**	**637**	**7,871**	**591**	**87**	**29**	**577**	**11,122**
Overall Total	**441**	**40,953**	**798**	**16,634**	**47,820**	**26,765**	**2,841**	**6,004**	**6,120**	**148,371**

3.7.2 Employees in CultureProviding Support Services in the FY2011/12

Table 3.16 below presents the total number of employees providing support services to cultural productive/economic activities in the last financial year by category of employee and domain. Overall, a total of 81,685 employees provided support services in the cultural and creative industries. Of these, 56,288 were males while 25,397 were females. Across all domains there were more males than females.

Considering skill, there were 50,723 professionals and 30,962 non-professionals providing support services to cultural productive/economic activities in the last financial year. The highest number of professionals were in the Books and Press domain (23,968) followed by Audiovisual and Interactive Media domain (12,800). The highest number of non-professionals was also in the Books and Press domain (14,559).

The distribution of employees providing support services to the cultural and creative industries by category of employees shows that more than half (51,816) were permanent employees, 25,022 employees were temporary while 4,847 were volunteers**.** There were generally more males than females on permanent employment terms across all domains apart from Cultural and Natural Heritage and Visual Arts and Crafts domains.

Table 18 Staff providing support services to cultural economic activities in FY2011/12

	Domain									
Characteristic	**Cultural and Natural Heritage**	**Books and Press**	**Perform-ing Arts and Celebr-ation**	**Visual Arts and Crafts**	**Audio-visual and Inter-active Media**	**Design and Creative Services**	**Cultural Tourism**	**Intangible Cultural Heritage**	**Sports and Recreation**	**Total**
Sex										
Male	76	28,565	120	1,769	13,039	8,497	707	1,265	2,250	56,288
Female	77	9,962	71	1,663	5,923	5,474	367	147	1,711	25,397
Skill										
Professional Male	12	18,135	89	1,062	9,024	4,044	487	1,177	800	34,830
Professional Female	22	5,833	53	1,380	3,776	3,703	272	147	707	15,893
Total - Professional	**34**	**23,968**	**142**	**2,442**	**12,800**	**7,747**	**759**	**1,324**	**1,507**	**50,723**
Non Professional Male	64	10,430	31	707	4,015	4,453	220	88	1,450	21,458
Non Professional Female	55	4,129	18	283	2,147	1,771	95	-	1,004	9,504
Total - Non-Professional	**119**	**14,559**	**49**	**990**	**6,162**	**6,224**	**315**	**88**	**2,454**	**30,962**
Category of employee										
Permanent Male	17	15,793	89	1,132	8,984	4,703	595	1,177	1,525	34,016
Permanent Female	32	6,258	60	1,557	4,969	3,180	276	147	1,321	17,800
Total - Permanent	**49**	**22,051**	**149**	**2,689**	**13,953**	**7,883**	**871**	**1,324**	**2,846**	**51,816**
Temporary										
Temporary Male	52	12,133	31	531	3,260	2,090	99	88	651	18,934
Temporary Female	38	3,491	11	106	795	1,295	91	-	260	6,088
Total - Temporary	**90**	**15,624**	**42**	**637**	**4,055**	**3,385**	**190**	**88**	**911**	**25,022**
Volunteer										
Volunteer Male	7	639	-	106	795	1,704	13	-	74	3,338
Volunteer Female	7	213	-	-	159	999	-	-	130	1,509
Total - Volunteer	**14**	**852**	**-**	**106**	**954**	**2,703**	**13**	**-**	**204**	**4,847**
Overall Total	**153**	**38,527**	**191**	**3,432**	**18,962**	**13,971**	**1,074**	**1,412**	**3,961**	**81,685**

3.8 Marketing Strategies and Opportunities

Marketing and advertising are tools that are used to market and popularize goods and services on the market. Advertising offered by an organization will allow information about the various products to reach the potential users.

The Survey collected information about the most common local communication channels such as newspapers, radio, telephone/mobile, internet, post office, television, magazines and fax. Organizations were asked about the major forms of communication that they use in transacting their business. Table 3.16 shows that the use of telephone was the most commonly used channel of communication with over 90 percent. Regions showed a similar trend in terms of the forms used for communication.

Table 19: Distribution of communication channels used by the institutions

Communication Channel	Kampala	Central	Eastern	Northern	western	Total
Telephone(Mobile & fixed)	92.9	88.0	83.5	95.6	93.8	90.6
Fax	10.6	0.1	2.7	8.8	5.9	6.4
Internet	45.2	21.6	45.6	48.2	38.0	38.9
Post office	15.7	3.5	35.6	26.3	10.9	15.6
Radio	14.1	9.3	28.3	48.2	25.5	18.2
Television	9.4	0.3	8.1	4.4	3.2	6.4
Newspapers/magazines	21.2	8.3	26.1	26.6	19.7	19.0
Others	23.5	44.2	42.8	21.4	26.8	31.4
Total	**232.7**	**175.2**	**272.7**	**279.5**	**223.9**	**226.4**

Findings further indicate that the use of fax and television is not so common among the institutions compared to other forms of communication.

3.8.1 Marketing Strategies

There is a general tendency of confusing marketing with advertising. In reality, advertising is only a single component of the marketing process. Marketing is the process of communicating the value of a product or service to customers for the purpose of selling the product or service while advertising

is the non-personal communication of information about products, services or ideas through the various media. It is usually paid for and persuasive.

Despite the introduction of modern methods of advertising such as the internet, public promotions, sponsoring events and the general media, table 3.18 reveals that word of mouth remains the dominant marketing strategy being used across all domains. This means that sales executives move to different places telling the public about the existence of these cultural products.

Table 20: Marketing strategies employed by the institutions

	Sports and Recreation	Intangible Cultural heritage	Cultural Tourism	Design and Creative Services	Audiovisual and Inter-active media	Visual arts and Crafts	Performing Arts and Celebration	Books and Press	Cultural and Natural Heritage
Internet adverts	14.0	0.0	74.3	21.1	22.1	32.2	30.0	23.0	27.8
Radio adverts	27.9	42.9	34.3	13.2	28.7	20.3	50.0	32.8	50.0
Community groups	14.0	28.6	14.3	17.1	14.8	32.2	30.0	13.1	22.2
Word of mouth	74.4	100.0	54.3	84.2	77.1	78.0	70.0	85.3	77.8
Billboards/posters	20.9	14.3	25.7	10.5	34.4	45.8	45.0	34.4	11.1
TV adverts	11.6	0.0	14.3	1.3	6.6	1.7	25.0	8.2	16.7
Paper/Magazines pullout	20.9	0.0	45.7	17.1	18.0	11.9	30.0	29.5	27.8
Sponsoring events	9.3	0.0	14.3	9.2	13.9	0.0	10.0	13.1	0.0
Others	39.5	42.9	22.9	25.0	20.5	30.5	25.0	34.4	27.8

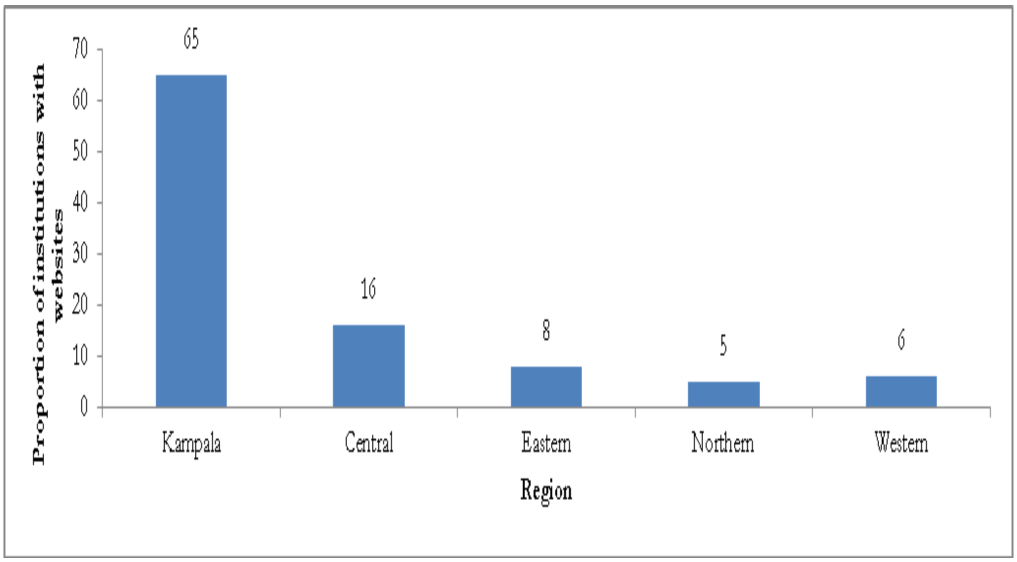
Results further indicate that internet adverts were mostly used by institutions in the Cultural Tourism domain. The least marketing strategy being used by institutions was sponsoring events.

3.8.2 E-Marketing

E-communication is currently being used by many organizations in the world today including industries dealing in culture and creative products. Many organizations have also adopted social media such as Facebook and Twitter because it is believed that it reaches the targeted audience easily. Social media is considered as one of the most effective ways of boosting business today. Many institutions are supplementing the traditional marketing strategies with websites.

The Survey collected information on the use of internet for marketing organizational products. Figure 3.8 shows that more than half of the institutions in Kampala (65%) had a website. The northern region registered the least proportion (5%) of institutions with websites. Institutions without websites took on a similar trend across all regions.

Figure 3. 11: Distribution of Cultural Institutions with websites by region



Institutions that had a website were required to state what they used it for. Table 3.19 shows that websites were mainly used for marketing, sharing of information and advocacy. Analysis by domain shows that almost all the domains revealed that institutions mostly use their websites for marketing their products. However, institutions in Intangible Heritage and Sports and Recreation domains showed a significant varying pattern. All institutions dealing in intangible heritage used their websites for marketing and sales while those in Sports and Recreation used them for networking (85%) and advocacy (71%).

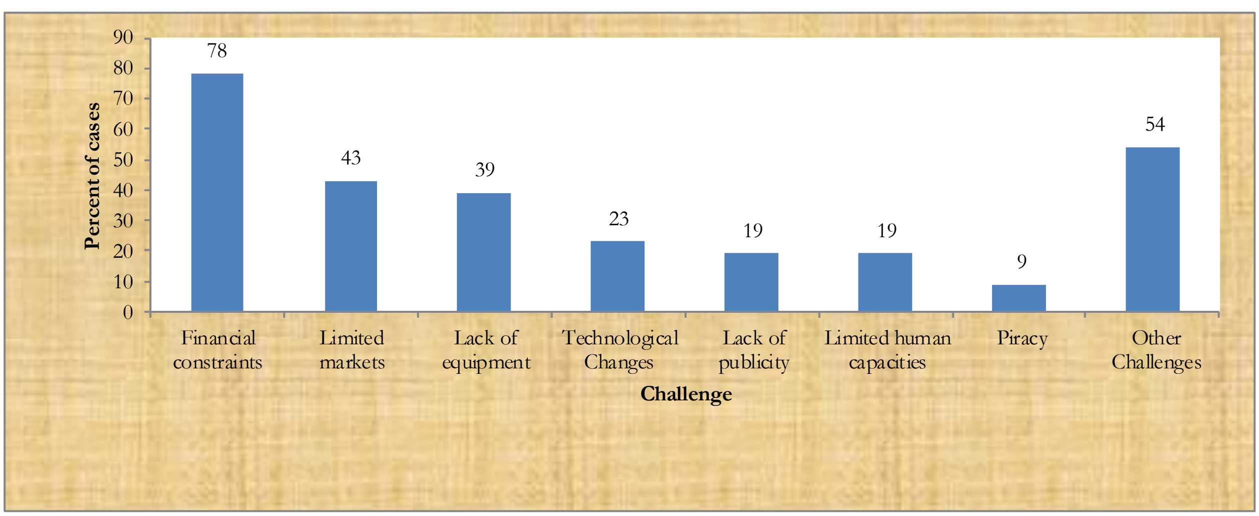
Table 21 : Distribution of Institutional websites by Domain and Type of use

Type of use	Culture and Natural Heritage	Books and Press	Performing Arts and Celebrations	Visual Arts and Crafts	Audio Visual and Inter-active Media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Sports and Recreation
Information sharing	71.4	75.0	85.7	57.1	68.2	63.6	63.0	0.0	42.9
Marketing	57.1	81.3	85.7	85.7	72.7	72.7	88.9	100.0	57.1
Advocacy	42.9	18.8	28.6	14.3	18.2	18.2	55.6	0.0	71.4
Sales	14.3	43.8	14.3	42.9	31.8	9.1	0.0	100.0	14.3
Fundraising	57.1	12.5	14.3	14.3	0.0	0.0	3.7	0.0	57.1
Networking	42.9	37.5	71.4	42.9	22.7	45.5	37.0	0.0	85.7
Showcasing	0.0	56.3	71.4	42.9	40.9	54.6	48.2	0.0	0.0
Other Uses	0.0	18.8	0.0	14.3	22.7	0.0	0.0	0.0	0.0

3.8.3 Challenges in Marketing Institutional Products

Institutions reported the types of challenges being faced in marketing their products. Figure 3.13 shows that financial constraints were reported as the leading constraint hindering the marketing of various cultural products with 78 percent. A good number of the institutions reported that limited markets (43%) and the lack of equipment (39%) also hinders the marketing of their products.

Figure 3. 12: Distribution of challenges faced by institutions

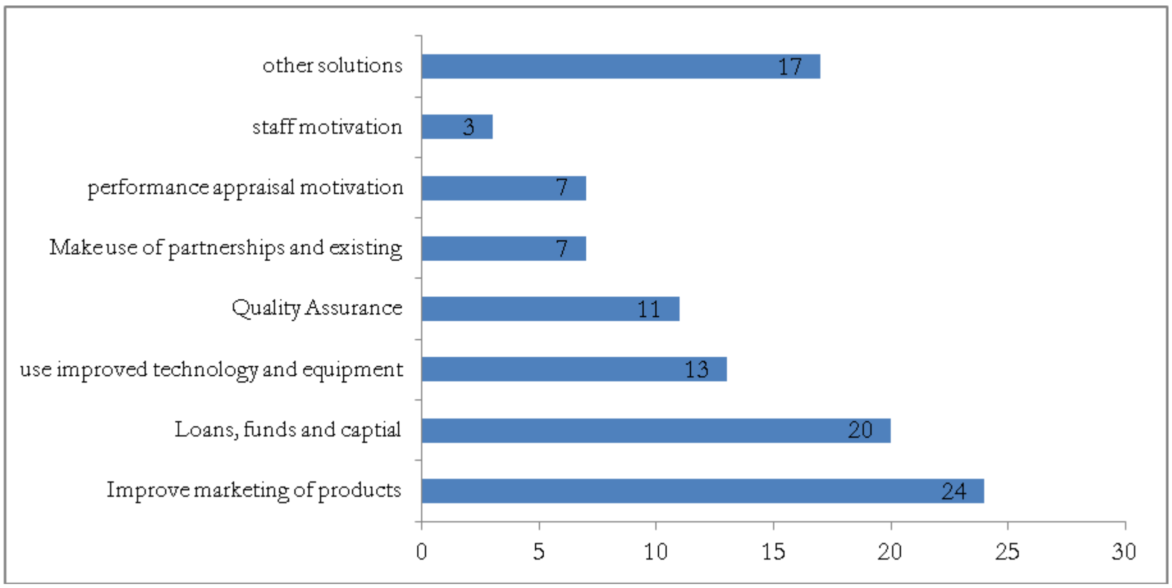


Contrary to the general belief, only 9 percent of the institutions reported piracy as a challenge while marketing their goods.

3.8.4 Ways of Addressing the Challenges

Respondents were also asked to provide some of the strategies they use to address the challenges they face as institutions. The analysis in figure 3.14 reveals that majority of the institutions reported improvement in the marketing of products (24%) , getting loans from financial institutions (20%) and use of improved technology (13%) as the major strategies used to mitigate the challenges.

Figure 3. 13: Institutions which use a particular solution to address challenges



3.8.5 Engagement in Data Collection

Information is useful for strategy formulation and performance monitoring at all levels. Over 6,000 institutions (about half) involved in culture and creative industry reported to be collecting some information of a statistical nature.

A large proportion (42%) of these institutions was Audiovisual and Inter-active media domain and the least was from Performance Arts Celebrations domain with less than one percent as captured in table 3.20. This is a signal that there is need for more sensitization among the culture and creative institutions about the role of statistics in planning.

Table 22: Distribution of institutions collecting information by Domain

	Number	Percentage
Cultural and Natural heritage	22	0.4
Books and Press	1,235	19.7
Performing Arts and Celebration	17	0.3
Visual Arts and Craft	956	15.3
Audiovisual and Inter- active Media	2,624	41.9
Design and Creative Services	818	13.1
Cultural Tourism	91	1.4
Intangible Cultural Heritage	88	1.4
Sports and Recreation	409	6.5
Total	**6,259**	**100.0**

The Study further investigated the challenges the institutions were facing in relation to data collection. Table 3.21 shows that the major challenge was inadequate funding experienced by 2/3 of the institutions.

Table 23: Distribution of the challenges related to data collection

Challenges	Number	Response
Inadequate funding	155	66.7
Limited human capacity	48	20.7
Lack of expertise	51	21.9
Lack of Culture Statistics Framework	24	10.3
Technological changes	60	25.9
Others, Specify	113	48.7
Total	**450**	**194.1**

Twenty six percent reported the continuous technological changes as a major hindrance to the collection of statistics within institutions. On the other hand, the lack of a culture statistics framework was ranked least among the challenges related to data collection with about 10 percent.

3.9 Conclusion

In summary, Kampala City has almost half (47%) of the institutions followed by Central region (26%) while Northern region had the lowest percentage (7%) of institutions engaging in culture and creative activities. Also, half of the institutions that were registered were in Kampala (50%).

The Survey estimated a total of 82,000 employees providing support to the cultural and creative industries. The disaggregation indicated that of these, 52,000 were permanent employees, 25,000 were temporary while about 5,000 were volunteers.

Seventy-six percent of the females acquired the skills through self-training compared to 47 percent of males.

Generally, 59 percent of the institutions had gross revenues/incomes not exceeding US$ 5,000 while two thirds (67%) of institutions had estimated total annual expenditures on culture specific activities not exceeding US$ 5,000 in the last financial year prior to the Survey.

The majority of institutions and individuals (87% and 85% respectively) reported sales and performances as the major source of funding for culture specific activities.

More than half of the institutions in Kampala (65%) had a website. The northern region registered the least proportion (5%) of institutions with websites. All institutions dealing in intangible heritage used their websites for marketing and sales while those in sports and recreation used them for networking (85%) and advocacy (71%).

Lastly, Survey findings showed that over 6,000 institutions (about half) involved in culture and creative industry reported to be collecting some information of a statistical nature.

CHAPTER FOUR
ANALYSIS BY DOMAIN

4.1 Books and Press

This domain covers books, newspapers and magazines, other printed matter, literary works and book fairs (UNESCO 2009, Framework for Cultural Statistics).

4.1.1 Enterprises and Institutions

The Institutions in this domain are both public and private. The public institutions in this domain include; the Uganda Printing and Publishing Corporation, the New Vision Printing and Publishing Corporation, the Uganda Media Council and the Uganda Media Association. The others are National Media Centre and the Ministry of Information and National Guidance which is the overall policy organ of Government. The private institutions include; British-based publishing houses such as Macmillan, Longman, Heinemann, Oxford University Press, Thomas Nelson, the Cambridge University Press, Evans and various indigenous privately owned printing and publishing companies. Within this domain, there is a collective management organization, the Reproduction Rights Organisation which is empowered to collect royalties for its members within this domain and also ensure that the intellectual property rights of members are protected.

4.1.1 Statistical Data Collected

The Survey revealed that over 64 percent of the institutions in the sector are located in Kampala, with 12 percent for central, 10 percent for western, 8 percent for eastern and 7 percent for the northern region. The Book and Press at 47 percent provide the largest employment opportunities among the cultural and creative industries. In this domain, the Survey revealed that about 20 percent collect data. Furthermore, while 57 percent of the enterprises are registered, a significant percentage of 43 percent are unregistered. This indicates that more has to be done to fomalise this sub-sector.

The Survey findings are supported by the Mapping of Cultural Industries in Uganda (UNATCOM report 2009/10) that indicated that the book and press domain is concentrated in central Uganda (62%) and at their least in the northern region (8%).

4.1.2 Economic Activities

The main economic activities in this domain are; book printing and publishing, newspapers, magazine and digital content production through CD ROM, DVD and the Internet.

Trends in Uganda's book industry are much in line with those of many other sectors in Uganda's economy. Uganda's decision to liberalize its economy in the early 1990's has seen many outsiders coming to invest in various economic activities in the economy (Tumusiime 2005). For instance, the number of suppliers of books has grown from two publishers who used to supply most of the education books, to over ten companies doing it now. Most of these are British-based publishing houses. Some Kenyan-based publishers have also increased their activity in the Ugandan market and for the first time in many years, some indigenous publishers are also supplying both the local and regional markets.

In the Newspaper sector, The New Vision is the country's leading daily published by the New Vision Printing and Publishing Corporation. The Company was established as a Government institution in 1986. The Mapping of Cultural Industries in Uganda (UNATCOM report 2009/10) indicated that the paper has a print run of about 35,000 copies of New Vision, 36,729 of Sunday Vision, and 15,918 of Bukedde and a readership of more than 300,000 people. The New Vision also distributes a Luo-language paper, Orumuri that is published weekly in Runyankole; and the Ateso-language paper called Etop.

Another big player in the Newspaper sector of Uganda is the Daily Monitor which was established in 1992. The Monitor's daily print run is 25,000 with a readership of 200,000 people (UNATCOM report 2009/10). The Monitor Publications also publishes several books by local authors, some of which are used as text books in schools. The Monitor Publications and its FM stations have provided employment for full-time and part-time workers.

Other Newspapers in the sector include the Red Pepper which is a daily tabloid, the East African, Business Week and the Sunrise. In this domain, there are various magazines including; Business

Today Publications which has a monthly run of about 3000 copies. The others include; the Independent a political analysis magazine, Bride and Groom and African Woman which produces features of successful and career women.

4.1.3 Contribution to Employment

The Books and Press domain is the largest provider of employment to both professional and non-professionals male and female workers. The domain employs approximately 40,953 out of the total of 148,371 covered in the Survey which is equivalent to 8 percent. The biggest employers are the New Vision, the Daily Monitor printing and publishing Corporations and other publishers some of which double as commercial advertising enterprises.

Considering skills engagement, the domain had an impressive number of professionals (22,714). Also, the domain had 30,352 permanent employees out of 104,278 which accounts for 29 percent.

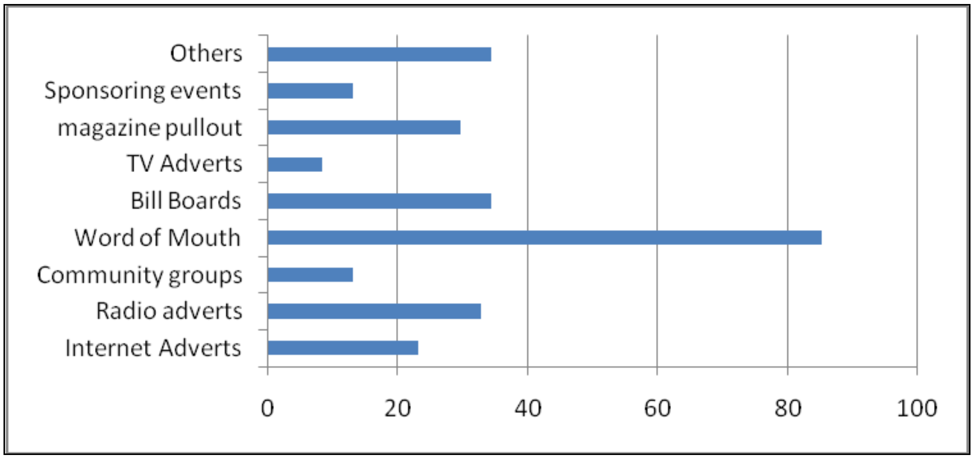
4.1.4 Contribution to Gross Revenue

The Survey revealed that while the domain had the highest percentage of institutions with gross revenues in excess of US$ 500,000 (14.6%), the domain has a significant number of enterprises earning below $5000 (45.5%). This implies that there are few large enterprises but the sector is dominated by micro and small enterprises. 84 percent of the funding in the Book and Press domain comes from sales and promotion. Government subvention is only 7 percent.

4.1.5 Marketing Strategies

The main channels and strategies for marketing under this domain is the word of mouth through sales and marketing teams which stands at over 85 percent followed by marketing through billboards at 34 percent. There is also evolving technology driven marketing through the internet that accounts for 23 percent. Other strategies include radio and television marketing, sponsorship and community groups as shown below;

Figure 4. 1: Marketing strategies by percentage



Source: Survey data

4.2 Performing Arts and Celebrations

This domain covers performing arts, music, festivals, fairs and feasts (UNESCO 2009, Framework for Cultural Statistics).

4.2.1 Enterprises and Institutions

The enterprises and institutions under this domain are public and private. The key public institutions include; the Ministry of Gender, Labour and Social Development which is mandated with the culture function, the Ministry of Tourism, Wild life and Antiquities which is responsible for built heritage and the Uganda National Cultural Centre which is also responsible for the promotion and preservation of culture. The local Governments are also mandated to promote culture in their jurisdictions. Other supportive public institutions include; the Uganda Bureau of Statistics, which is responsible for generating national culture statistics and the Uganda Investment Authority, which has started to attract investment into the creative economy. Another critical institution is the Uganda Performing Right Society (UPRS), which is a private collective management organization that collects and distributes royalties to musicians. The UPRS has a membership of about 1000 artistes.

The enterprises in this domain are largely private and these include; cultural centres, dance and drama troupes, theatres and sole artistes. These are spread all over the country but as the findings indicate, most are around the urban centers.

4.2.2 Statistical Data Collected

The Survey revealed that 65 percent of the institutions and enterprises are located in Kampala. 25 percent are located in central, 10 percent in western and there was no visible presence in eastern and northern Uganda. While over 55 percent of the institutions in this domain are registered, a significant number remain unregistered (45%). Most of the registered (74%) are in Kampala. Furthermore, at least 35% of institutions enterprises in this domain had existed for 20 years or more. The domain also had the highest percentage of individuals with above secondary level education (42 %) with 24 percent having cultural specific training. Meanwhile, this domain was the least with less than 1 percent at collecting any statistical data compared to other domains.

4.2.3 Economic Activities

The main activities of the domain are; content origination, stage plays and performance production, public performance of music, dance and drama, festivals and touring. Most of these activities are enjoyed by the public at a cost.

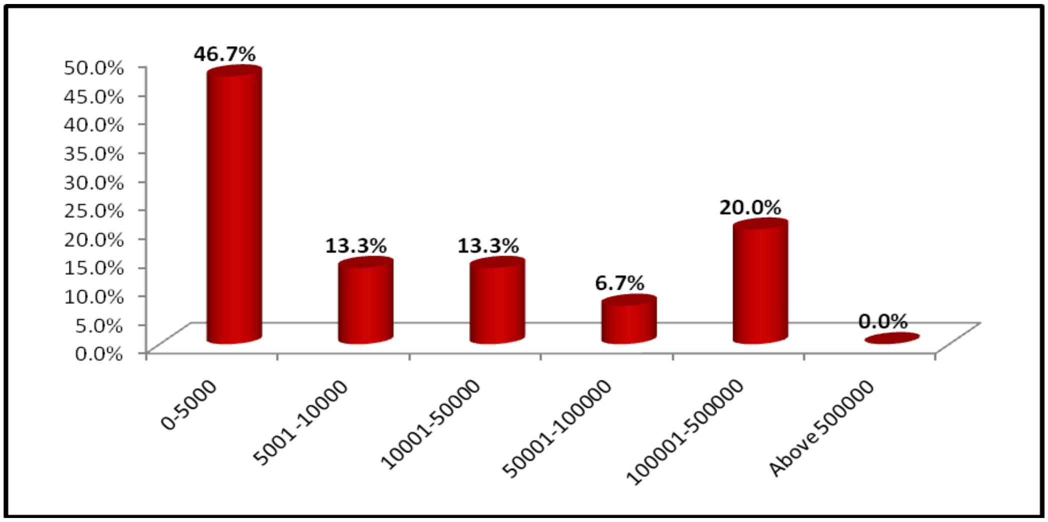
4.2 4 Contribution to Employment

In terms of employment, there are a significant number of people involved in the Performing Arts and Celebration domain across the country but organized performing groups are relatively few. Furthermore, these organized groups are micro and small enterprises with few employees and relatively few professionals. In terms of employment the sector contributes a meager 798 out of 148,371 employees in the sub-sector accounting for 0.5% of employment because most of the enterprises are unregistered (45%) and are operating informally.

4.2.5 Contribution to Gross Revenue

The majority of enterprises in this domain earn less than US dollars 5000 (46.7%) annually with a few earning between US dollars 100,000- 200,000 (20.0%). No Institution or enterprise could be established in the revenue bracket of US dollars 500,000 and above.

Figure 4. 2 : Gross revenue (X) Vs Proportion of Enterprises (Y)



65 percent of these institutions source funding through sales and promotion of their services while Government subvention is about 25 percent while 35 percent comes through fundraising.

4.2.6 Marketing Strategies

The markets in this domain include; the general public and other creative enterprises such as radio and television stations. Of recent, the telecommunication and internet companies are also part of the market. Marketing under this domain is still largely by word of mouth (70%). Other strategies are radio (50%) and Bill Boards (45%).

4.3 Visual Arts and Crafts

This domain covers fine art, photography and crafts (UNESCO 2009, Framework for Cultural Statistics).

Visual art and craft are a result of the feelings of the people responding to a variety of historical events, influences and the environment in a spontaneous manner. In particular, crafts are an art creation made through the application of indigenous skills resulting from knowledge and regular practice. Crafts in Uganda include but are not limited to; art and paintings, sculpture, home decoration articles, basketry products, bead works, pottery, accessories, florist vessels, household gifts, batiks, Jewelry, toys, music instruments and ornaments. Others are; ceramics and wood carvings, hand textiles and woven products. Most of these products are made from natural resources and recyclable materials.

4.3.1 Enterprises and Institutions

There are various institutions that support the domain. Some of them are public while others are private. The public institutions include; the Ministry of Gender, Labour and Social Development, the Ministry of Trade, Industry and Cooperatives, Uganda Investment Authority, Private Sector Foundation, Uganda Export Promotion Board and Private sector Foundation Uganda among others.

The other nationally recognized institutions are; Uganda Small Scale Industries, National Arts and Crafts Association of Uganda (NACAU) and the Uganda Women Entrepreneurs Association. Some of these umbrella organizations double as enterprises. The private and the public enterprises have implemented joint interventions that have made the domain more profitable. This collaboration has enhanced the identification of markets and grown the export trade in visual arts and crafts in the regional and international markets.

4.3.2 Statistical Data Collected

Data collected indicates that 37 percent of the enterprises are registered and operating in Kampala while 34 percent are in the central region. Eastern region accounts for 14 percent, western, 12 percent and northern accounts for a paltry 3 percent. The majority of the institutions are not registered (62.9%) with the registered accounting only for 37 percent. 18 percent of the operatives are females and 8 percent are male. In this domain, 15 percent of enterprises collect statistical data. This is largely because the domain is listed among the export products and such data is produced by Uganda Revenue Authority.

4.3.3 Economic Activities

The main activities under this sector comprise the production and marketing of visual arts and crafts products by enterprises. The main producers are women, youth and persons with disabilities selling mainly to tourists. There are a few commercial producers who export to markets in Europe and North America.

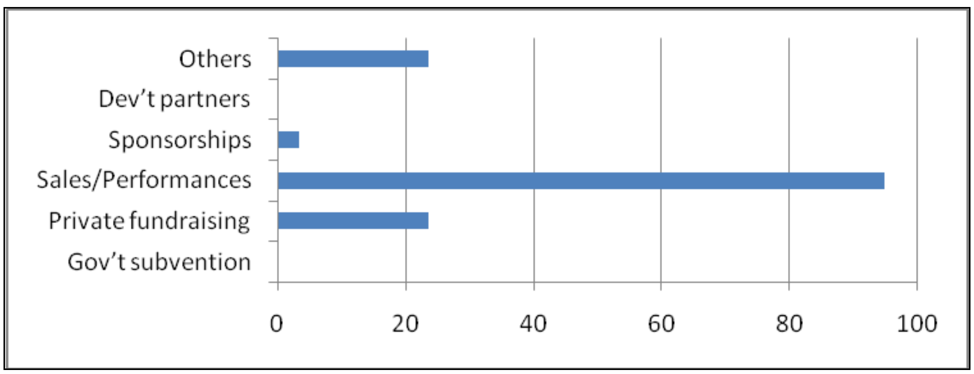
4.3.4 Contribution to Employment

The Survey revealed that the domain contributes to employment with 16,634 out of 148,371 covered by the Study representing (11 %).

4.3.5 Contribution to Gross revenue

Data collected indicates that 68 percent of the enterprises are in the income bracket of US$ 0-5000. Funding of activities under this domain is largely from sales and promotion accounting for 95 percent and 24 percent from private fundraising. Data indicated that there is no Government subvention to this sector as indicated in the figure below. The domain is largely self-funded with many enterprises relying on sales and promotion to earn revenue as in the figure below.

Figure 4. 3 : Sources of revenue

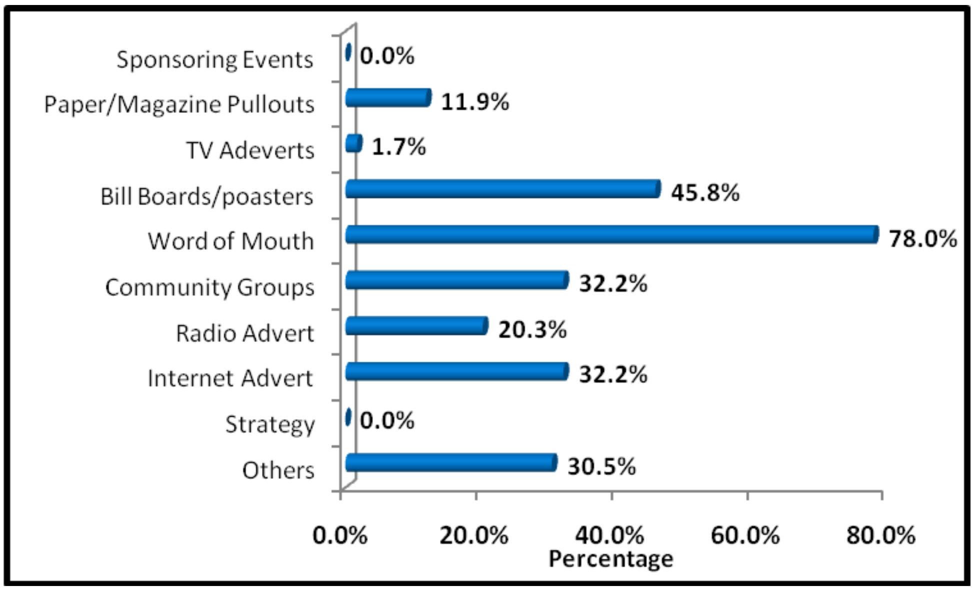


Source: Survey Data

4.3.6 Marketing Strategies

Commercial selling outlets for visual arts and crafts are common in major urban centres, tourist sites, hotels and along major high ways routes. There are few commercial art and craft villages located in Kampala City. The export markets of the products include; Europe especially the United Kingdom, Germany, Austria, Australia, Canada, Denmark, Japan and Italy. USA also imports a sizeable amount of these products through tourists who visit Uganda (UEPB 2008). Other markets for Uganda's crafts are Ugandans in the Diaspora and Kenyan traders who buy and blend Ugandan craft pieces and re-export them to Europe and the USA. The Survey reveals a combination of marketing strategies largely dominated by the word of mouth through direct sales with clients as indicated in the graph below.

Figure 4. 4 : Comparing marketing strategies in the domain



Source: Survey Data

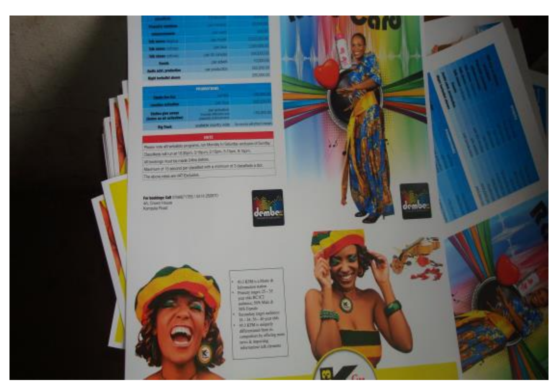
Literature indicates that the main market for Uganda's art and crafts products include the EU-25 gifts and decorative articles under EBA (Everything But Arms) agreement and the USA under AGOA (American Growth Opportunities Act), both of whom offer preferential treatment for Uganda's art and crafts export products.

4.4 Audiovisual and Inter-active Media

This domain includes; Film and Video, TV, Radio, Internet live Streaming and Video Games (UNESCO 2009, Framework for Cultural Statistics).

4.4.1 Enterprises and Institutions

In Uganda, the domain is dominated by production companies for programming, broadcasting and transmission. The key regulating institution is the Uganda Communications Commission which is



mandated to license television and radio broadcasting, film, digital and online content. The Uganda Broadcasting Corporation provides digital signals for all radio and TV broadcasters. Another regulating body is the National Broadcasting Council. The Uganda Federation of the Movie Industry is the collective management organization in this area and the Uganda Investment Authority provides investment incentives to investors in the domain.

In terms of broad casting, the state-owned Uganda Broadcasting Corporation (UBC) dominates the country's television broadcasting primarily because its signal covers about 90 percent of the country and operates at government subsidized rates compared to other stations. Private broadcasters include; Africa Broadcasting Corporation (NTV), Wavah Broadcasting Service (WBS), Top TV, Urban TV, East Africa TV, and LTV.

In the Radio sub-sector, there are public and private operators who are well distributed in all parts of Uganda with almost every district hosting a radio station.

In the film sub-sector, there are a few film producers. However, the few own fairly large companies such as VCL studio and Photogenix. There are various kiosks that sell films including Ugandan films across the country but most are operating informally and illegally.

4.4.2 Statistical Data Collected

42 percent of the enterprises are located in Kampala, 26 percent are in central region and 16 percent are in the eastern region. 12 percent are in the northern region. The west with 4 percent has the least number of enterprises in this domain.

52 percent of the institutions under this domain are registered. Of the registered institutions, 33 percent are in Kampala. The central has 22 percent, eastern has 24 percent. Northern has 14 percent and western has 6 percent. In this domain 88 percent of operators are male while 12 percent are female. Previous studies such the UNATCOM 2009 and Synovate of 2009 indicates that Uganda has over 20 Television stations and about 220 Radio Broadcasting companies across the country.

4.4.3 Economic Activities

The economic activities under this domain include; competitive broadcasting services with television and radio, advertising and entertainment. There is also a slow but visible growth of local Ugandan movies some of which have enjoyed continental success. Coupled with these are annual film festivals such as the "Amakula" and "Manya" film festivals. The Uganda Federation of the Movie Industry estimates that there are about 1200 movie distributors in Kampala alone although only a few are licensed to do this business. The component of cinema and audio visual media is also becoming common in the densely populated towns of Uganda.

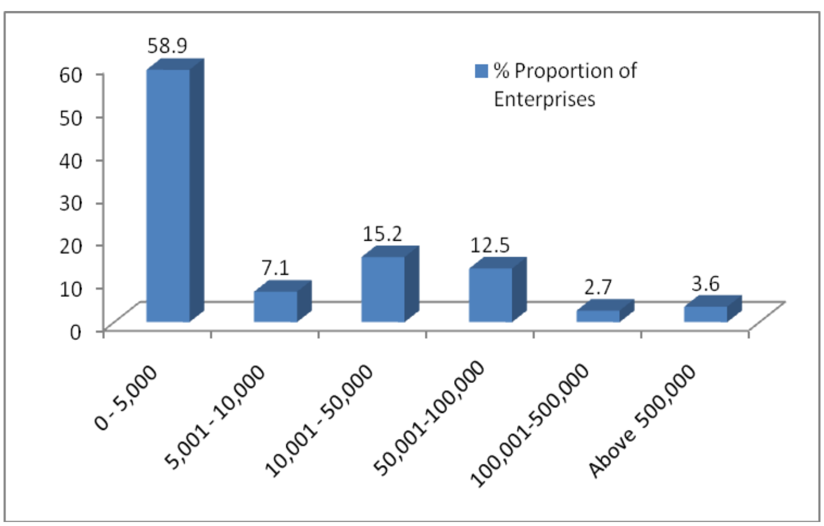
4.4.4 Contribution to Employment

Under this domain, people are employed in production, journalism, studio recording, broadcasting and lighting among others. It is estimated that freelancers make up almost 60 percent of the total labour force in these enterprises (UNATCOM 2009). 32,953 out of 148,371 constituting 22 percent covered under the Survey. Male employees dominate both professional and non-professional categories of employment under this domain. Employment categories are summarized in the figure below;

4.4.5 Contribution to Gross Revenue

Although there are a good number of enterprises of US$ 50,000 and beyond, the majority of the enterprises fall under the gross revenue bracket of US$ 0-5000

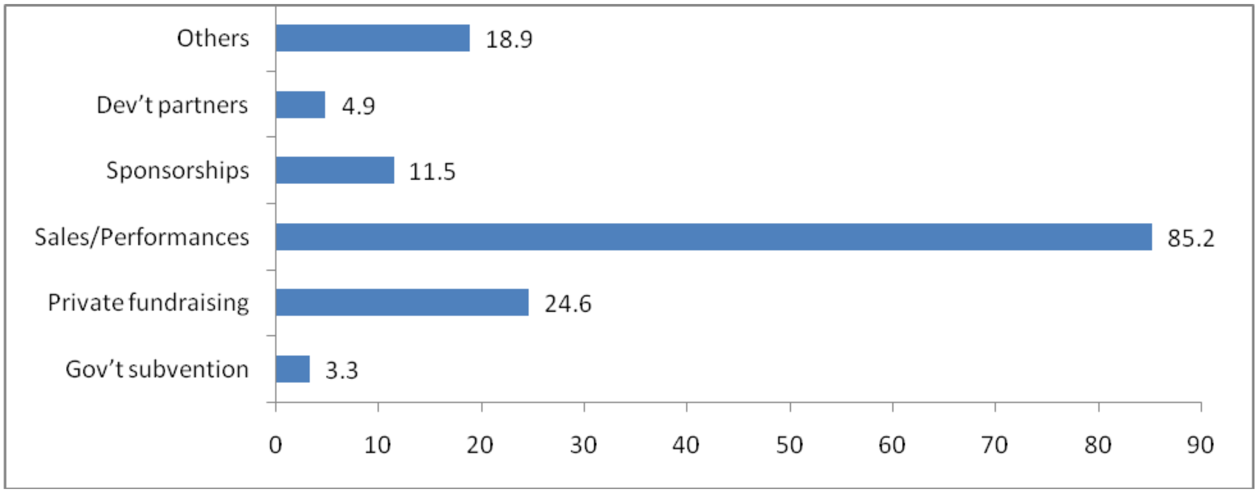
Figure 4. 5 : Gross Revenue(X) vs % Proportion of Enterprises (Y)



Source: Survey Data

The major source of revenue for enterprises under this domain fall in the category of sales and performances. The other sources of revenue are private fundraising and sponsorships as shown in the figure below.

Figure 4. 6 : Source of Funding vs % Proportion of Revenue Contribution

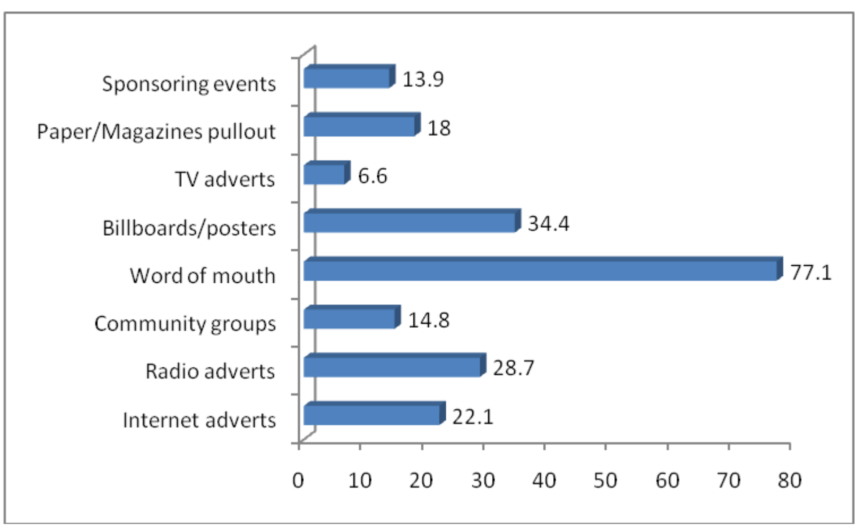


Source: Survey Data

4.4.6 Marketing strategies

In this domain, marketing and promotion strategies are through the word of mouth, followed by billboards, radio advertising and papers/magazines as captured in the figure below.

Figure 4. 7 : Use of Marketing Strategy by Percentage



Source: Survey Data

4.5 Cultural and Natural Heritage

This domain includes; Museums, Archeological and Historical Places, Cultural Landscapes and Natural Heritage (UNESCO 2009, Framework for Cultural Statistics).

4.5.1 Enterprises and Institutions

Uganda has an impressive historical stock of museum and heritage sites (Uganda Museums, 2009). Some of the themes/inspirations presented by various museums include; peace and reconciliation, African religion and Christianity, history and politics, wildlife, clans, cultural identity, indigenous literature, bark cloth, iron-smelting as well as music, dance and drama. The Uganda Museum, which was founded in 1908, is the largest in the country. It has exhibits of traditional culture, archeology, history, science, and natural history. There are about 15 small but living museums in the towns of Gulu, Moroto, Jinja, Butambala, Kampala, Hoima, Kibaale, Fort Portal, Kasese, Mbarara and Kabale (CCFU 2007).

Others include; the traditional palace in Kawere, African Museum in Wakiso, Kogere Museum in Fort Portal and Kabala museum. The central region leads in terms of museum and heritage sites followed by eastern region most of whose cultural sites are found among the Bagisu and Iteso. Teso has a mini museum that was established after the installation of the traditional cultural leader *"Emorimor"*.

The museum and heritage sites in the western region are concentrated in Kabarole and Hoima districts. The most active museums are in Tooro Kingdom located at the main Rukurato building (Traditional Parliament) and the traditional palace (the Kikari). Also, there are cultural sites in Kasese. Other Museums are in Mbarara, Isingiro and Kabale towns.

Cultural landscapes in the western region include; Nyamusure, Nyakasura tombs and *Mabele-ga-nyina-mwiru*. Other significant culture features in this region are; Bwindi impenetrable forest, Kitagata hot springs, the Mountains of the Moon (Rwenzori). Furthermore, according to Cross-Cultural Foundation of Uganda (2005), a number of communities use their homes, extra space like garages and basements as museums. Two such museums exist in Isingiro in western Uganda and in Moroto in north eastern Uganda reflecting the importance people attach to these enterprises. Furthermore, Makerere University's main library has a general collection of museum literature which is the largest in Uganda. The most important specialized collections are found in the Albert Cook Library at Makerere Medical School, the Institute of Teacher Education, (Kyambogo University) and the Makerere Institute of Social Research.

Further still, there are various monuments and conservation areas in Uganda. Also, the country has more than 300 cultural sites.

4.5.2 Statistical Data Collected

Data collected indicates that 46 percent of the enterprises are registered and operating in Kampala while 18 percent are in the central region. 36 percent are located in western region. The Survey did not indicate any enterprise in the eastern and northern regions of Uganda. This can be explained by the informal nature of operation in this domain thus making the community fail to appreciate enterprises falling in this domain. In terms of external market distribution, 43 percent target the EAC Market, 29 percent target the European market. North America and Asia account for 14 percent each.

4.5.3 Economic Activities

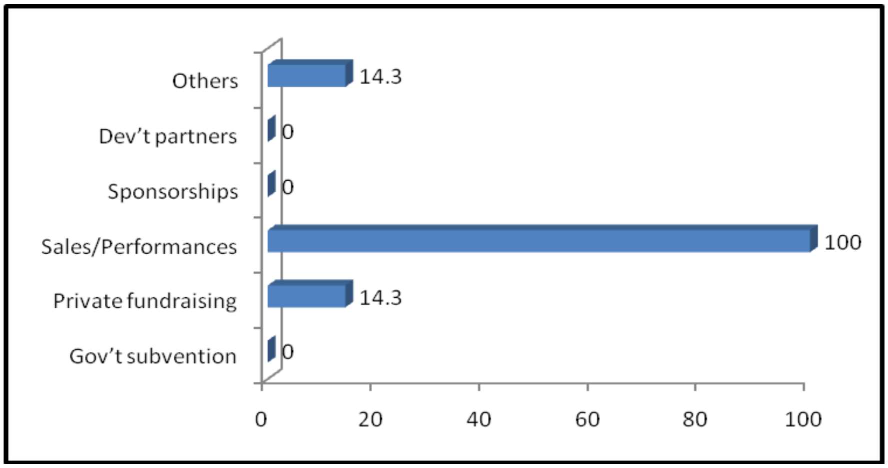
The economic activities in the domain include; tourism, research, education and learning services among others. The majority of the operators are private individuals, cultural institutions, CSOs and education institutions.

4.5.4 Contribution to Gross Revenue

Over 50 percent of the enterprises generate revenue of not more than US$ 5000 annually from foreign sales. About 25 percent generate revenue exceeding US$500,000. Many of these are major tourist attractions providing employment and contributing to the balance of trade in form of foreign exchange. For instance a single tourist in Bwindi pays US$ 530 and this area receives up to 2000 guests a year. By approximation Bwindi can generate total revenue of US$ 1million a year (UNATCOM 2009). These places also have a positive impact on local supply chains providing outlets for a wide range of specialist crafts and skills, whilst also being an important user of new technology for education, communication and research.

The Survey indicates that much of the revenue under the domain comes from sales and performances. Other significant sources of revenue and funding in the domain are private fundraising and sponsorship as indicated in the figure below.

Figure 4. 8 : Source of Funding Vs% Proportion of Revenue Contribution

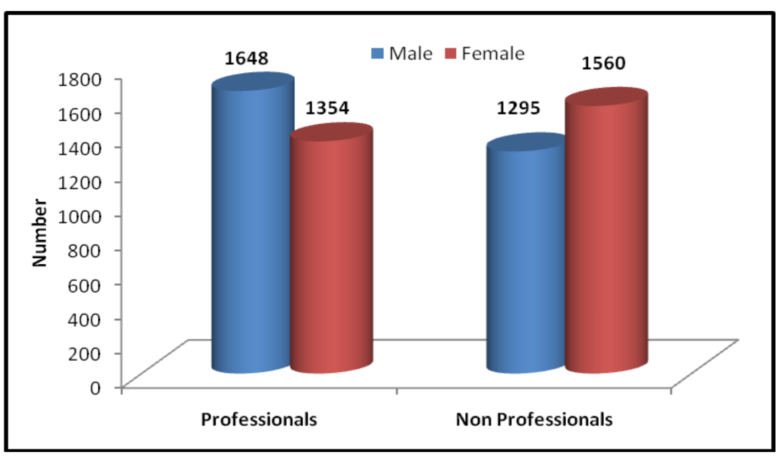


Source: Survey Data

4.5.5 Contribution to Employment

The domain provides employment to both professional and non- professionals with the majority being male employees as captured in the figure below.

Figure 4. 9 : Category of Employees Vs Total Number

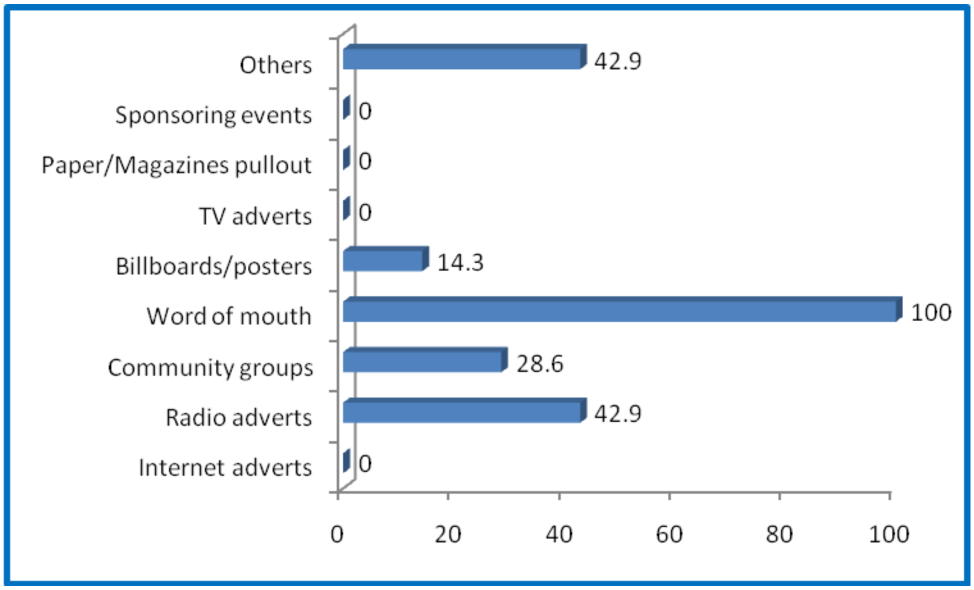


Source: Survey Data

4.5.5 Marketing strategies

Under this domain much of the marketing is done under the word of mouth, with the few promotion efforts done through bill boards and posters, radio advertising and print advertising in the newspapers and magazines as shown in the figure below.

Figure 4. 10 : Use of Strategy by Percentage



Source: Survey Data

The inadequate advertising explains the low revenue generation of enterprises in this sector coupled with the low appreciation by the community.

4.6 Design and Creative Services

This domain includes; Fashion Design, Graphic Design, Interior Design, Landscape Design, Architectural Services and advertising services (UNESCO 2009, Framework for Cultural Statistics).

4.6.1 Institutions and Enterprises

In this domain, the supportive institutions include training schools such as the schools of Art and Design in Universities and other tertiary institutions. There are some private enterprises that provide specialized training in design and fashion. There are also various enterprises involved in graphic designs around the country and many of these focus on printing services.

4.6.2 Statistical Data Collected

58 percent of the institutions are located in Kampala. The central region accounts for 26 percent eastern, 9 percent, western 7 percent and the north trails with 5 percent. 65 percent are registered and operating in Kampala while 13 percent are registered and operating in the east and central region each. Western region accounts for 7 percent. 82 percent of the enterprises target the EAC market. 9 percent the rest of Africa. North America and Australia account for 5 percent each.

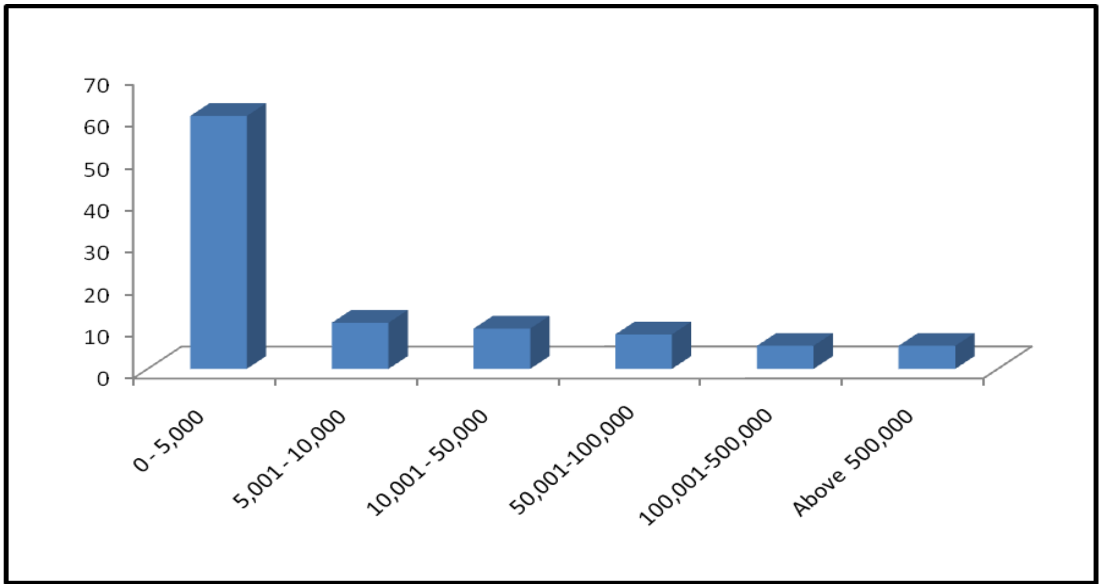
4.6.3 Economic Activities

Enterprises under this domain are involved in fashion design, art and design, graphic designs for the printing and publishing industry as well as broadcasting and entertainment. Some of the products in this domain are exported to different markets. Most enterprises under this domain operate on a small scale.

4.6.4 Contribution to Gross Revenue

44 percent of the enterprises are in the gross revenue range of US$0-5000, 6 percent earn between US$ 100,000-500,000 and 16.7% earn US$ 500,000 as captured in the figure below.

Figure 4. 11 : Gross revenue (X) Vs % Proportion of Enterprises (Y)

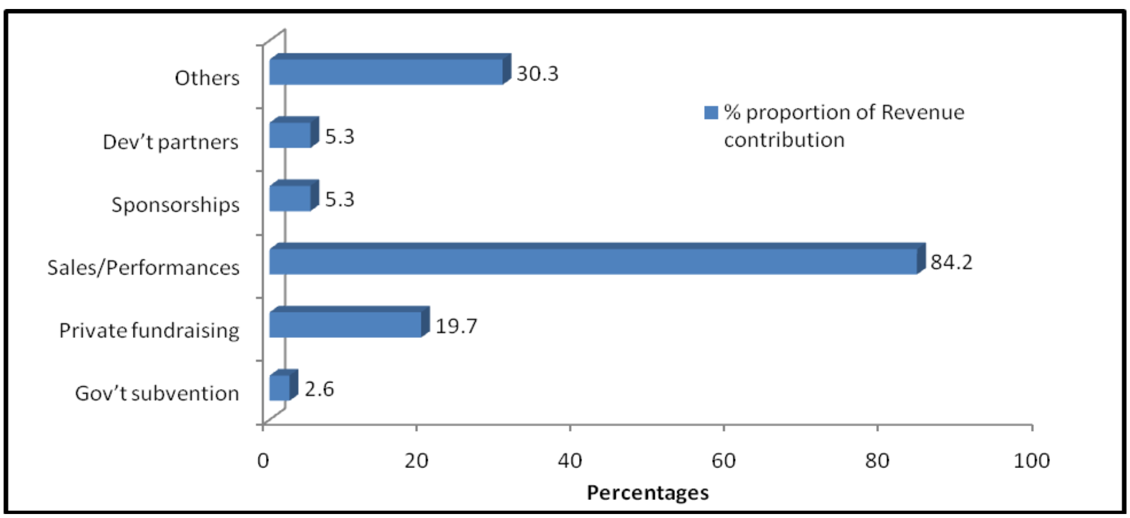


Source: Survey Data

Figure 4.12: Gross Revenue(X) vs % Proportion of Enterprises (Y)

The major source of revenue under this domain is sales and performances. Other sources include private fundraising and development partners' support as captured in the figure below.

Figure 4. 12 : Source of funding Vs % proportion of revenue contribution

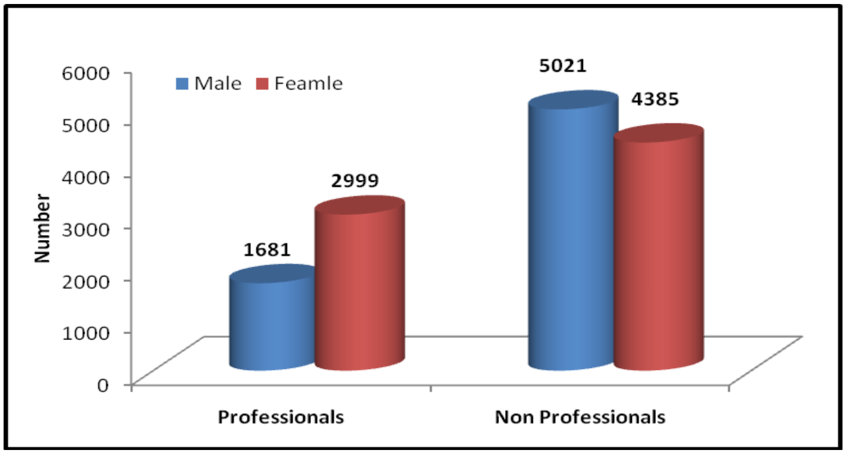


Source: Survey Data

4.6.5 Contribution to employment

The sector provides employment to male and female professionals. The majority are women accounting for 67 percent although there are more male non-professionals as shown in the figure below.

Figure 4. 13 : Category of Employees by sex

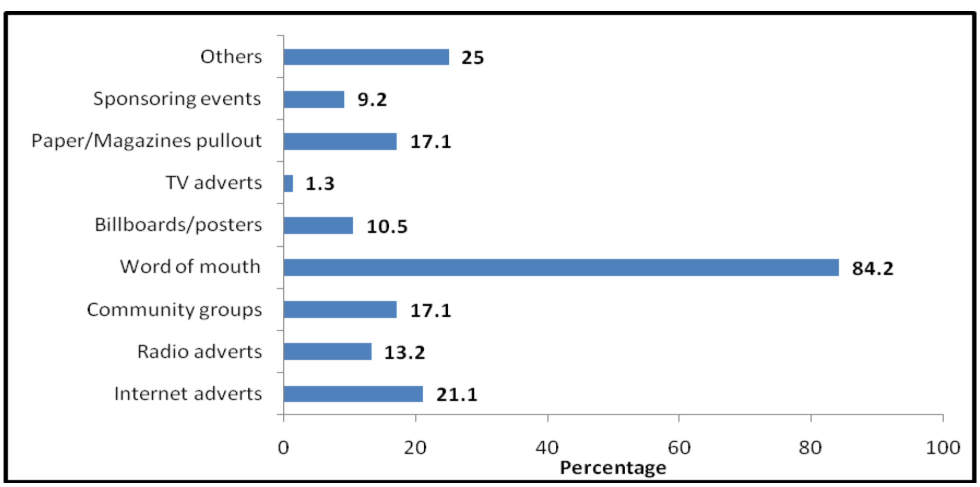


Source: Survey Data

4.6.6 Marketing strategies

The word of mouth is the dominant marketing strategy although a significant number of enterprises are involved in online marketing through the internet. Others strategies are; community groups, magazines and billboards as illustrated in the figure below;

Figure 4. 14 : Marketing Strategies used by Percentage



Source: Survey Data

4.7 Cultural Tourism

This domain includes; Cultural travel and tourist services, Hospitality and accommodation (UNESCO 2009, Framework for Cultural Statistics).

4.7.1 Institutions and Enterprises

The Ministry of Tourism, Wild life and Antiquities is the lead institution under this domain with the Uganda Tourism Board as the principal agency for tourism. Other key government institutions include; the Ministry of Gender, Labour and Social Development and the Uganda Export Promotion Board. The traditional/cultural institutions also play a key role in the development and promotion of cultural tourism. The private enterprises in this domain include; tour and travel agencies, transport operators, hotels and gift shops for cultural products.

4.7.2 Statistical Data Collected

Data collected indicates that 57 percent of the enterprises are operating in Kampala while 17 percent are in the central region and 20 percent are located in western region. The eastern region accounts for 6 percent and there were no enterprises identified in the northern region. This can be explained by the recent social and political history which has destroyed the community and cultural fabric of the area. A number of formal and informal activities are in a state of recovery and re-organization. In this domain, 89 percent of the institutions and enterprises are registered with 79 percent belonging to the private sector. Public companies and Government Ministries account for 4 percent each.

4.7.3 Economic Activities

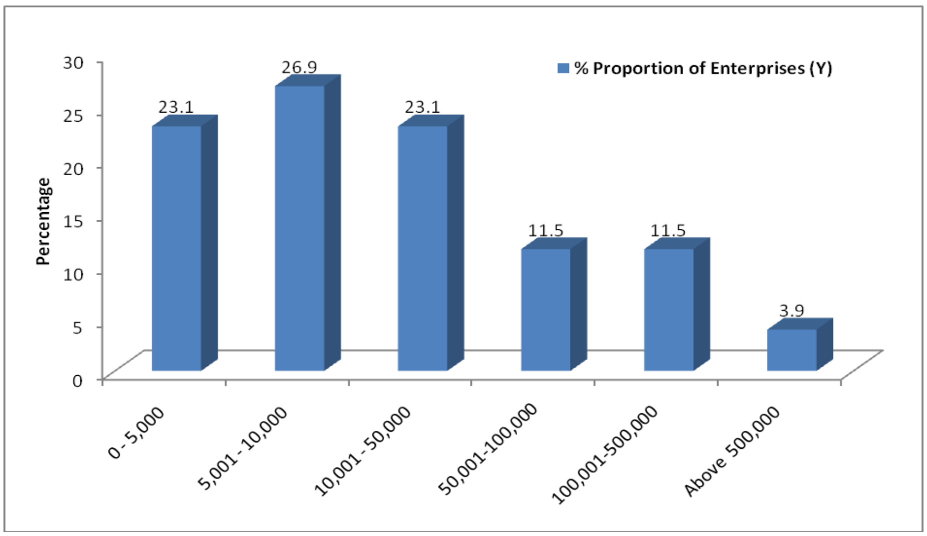
The domain is dominated by tour and travel, hospitality, promotion of sites and museums, sale of art and crafts and performances by cultural groups.

4.7.4 Contribution to Gross Revenue

The major source of revenue in this domain is the small scale Tour and Travel Agencies, resorts and camp sites, craft shops and art centre's. There are a few large enterprises under this sector especially those that provide hotel and hospitality services.

In this domain, majority of enterprises are small and medium. Over 25 percent earn between US$5000-10,000 annually. 10 percent of the enterprises earn up to US $500,000 and less than 5 percent earn above US$ 500,000 as shown in the figure below.

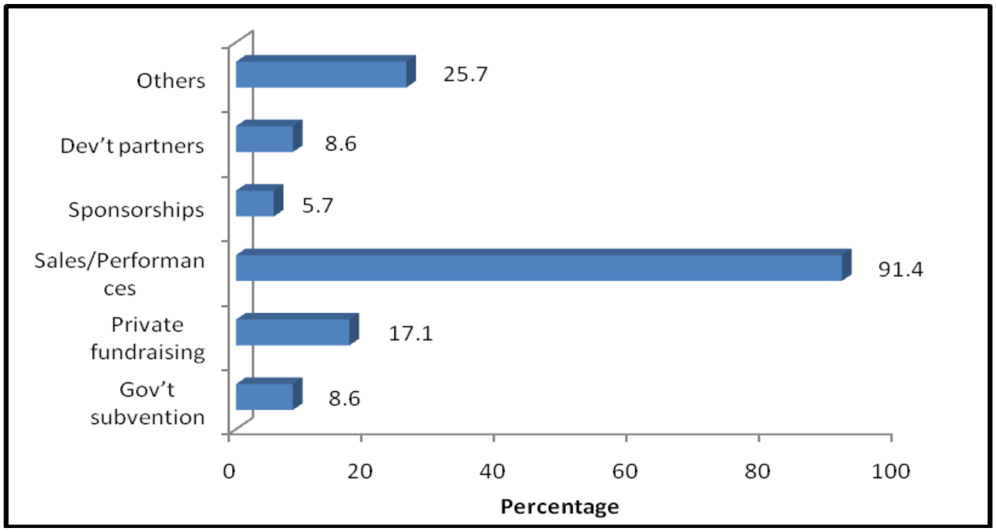
Figure 4. 15 : Gross Revenue(X) % Proportion of Enterprises(Y)



Source: Survey Data

Sales and Performances constitute the main source of revenue under the domain with private fundraising coming second followed by Government subvention and development partner support as shown in the figure below.

Figure 4. 16 : Source of funding VS % Proportion of revenue contribtion



Source: Survey data

4.7.5 Contribution to Employment

The domain offers employment to all categories of person's professionals and non-professionals, women and men. Males are the majority among the professionals while the females constitute the majority among the non-professionals.

4.8 Sports and Recreation

This domain includes; Sports, Physical fitness and well-being, amusement and theme parks, gambling (UNESCO 2009, Framework for Cultural Statistics).

4.8 1 Institutions and Enterprises

The Ministry of Education and Sports is the lead institution under this domain with National Council of Sports as the principal agency for sports. Other key institutions include the various federations, associations and clubs. The private enterprises include fitness and health clubs that are usually situated in hotels.

4.8.2 Statistical Data Collected

Data collected indicates that 49 percent of the enterprises are operating in central region with Kampala alone accounting for 30 percent. Western region accounts for 16 percent while the north and the east account for 2 percent each. In this domain, only 33 percent of the institutions are registered of which 75 percent are private and 8 percent are government owned.

4.8.3 Economic Activities

The domain is dominated by sports leagues, gala's and competitions, health and fitness activities. These generate revenue and provide employment.

4.8.4 Contribution to Gross Revenue

Most of the enterprises under this domain are micro and small. 73 percent earn between US$0-5000 annually. About 10 percent earn between US$ 10,001- 50,000. Only 7 percent earn above US$500,000.

4.8.5 Contribution to employment

Both men and women are employed under this domain with the majority of professionals being men. There are many non-professional men and women employees in this domain.

4.8.6 Marketing Strategy

Marketing in this domain is largely dominated by word of mouth, radio advertising, paper and magazine pull out and billboards.

4.9 Intangible Cultural Heritage

Intangible Cultural Heritage is considered as a supporting area of the domains. It includes; Oral traditions and expressions, rituals, languages, social practices (UNESCO 2009, Framework for Cultural Statistics).

4.9.1 Institutions and Enterprises

The Ministry of Gender, Labour and Social Development which is also the institution responsible for culture is the lead institution under this domain. The other key institutions include the Ministry of Tourism, Wildlife and Antiquities, the Ministry of Education and Sports and the

Local Governments. There are various civil society organizations involved in this domain and so are traditional/cultural institutions. This domain gained prominence when the Government of Uganda ratified the 2003 Convention on the protection and safeguarding of Intangible Cultural Heritage.

4.9.2 Statistical Data Collected

Data collected indicates that 71 percent of the institutions are in central region and Kampala alone accounts for 29 percent. No enterprises were identified in the rest of the regions. This could be because such institutions elsewhere may be operating informally.

4.9.3 Economic Activities

The domain is dominated by community culture activities such as funeral rites, naming ceremonies, initiation and marriage rites among others. Inventorying of intangible cultural heritage is another key activity. Most of these are social activities but some provide an income and employment to people.

4.9.4 Contribution to Gross Revenue

Most of the enterprises under this domain are micro and small. Seven percent earn between US$0-5000 annually. About 29 percent earn between US$ 10,001- 50,000. No enterprises earn above US$500,000.

4.9.5 Contribution to employment

Both men and women are employed in the domain at both professional and non-professional level. Women are the majority of the non-professionals in this domain.

CHAPTER FIVE
POLICY RECOMMENDATIONS

1. The Legal and Policy environment in the country has promoted the support and growth of culture and creative industries in Uganda. However, there are laws that are relevant to the growth of these industries that are obsolete and need review. Also, Uganda has ratified Conventions that are responsive to the growth of these industries but none of these have been domesticated. The Ministry of Tourism, Wildlife and Antiquities and the Ministry of Gender, Labour and Social Development and the Ministry of Justice and Constitutional Affairs should fast-track the review of relevant laws and the domestication of Conventions. Additionally, they should ensure that regulations are developed to support enforcement so that the sector can achieve its potential.

2. Financing of the Culture Sector at all levels by Government and the private sector is inadequate. Consequently, the actors in the sector are usually left on their own and their businesses do not survive. The Ministry of Gender, Labour and Social development should develop a strategic plan with the intention of advocating for the function and attracting sufficient funds to it at all levels. Additionally, the Ministry should provide guidance on the mainstreaming of culture in development plans and monitoring of culture related programmes in Government and Civil Society Organisations. The Ministry should consider initiating a grant for cultural practitioners. The Ministry should also be charged with coordinating and supporting National Associations.

3. Uganda lacks a statistical framework to guide the collection of culture statistics. The Ministry of Gender, Labour and Social Development should work with the Uganda Bureau of Statistics and the Uganda National Commission of UNESCO to develop the Uganda statistical framework for culture statistics. This would enhance the generation of statistics within the sector and enhance its visibility as a driver to the economic and socio-development of the Country. The framework would also support planning in the sector and at the same time attract financial support to it.

4. The Survey findings indicate that the Creative Economy provides revenue to Government, employment and incomes to people and sustains creativity which is needed in all aspects of economic and socio growth. However, the Creative Economy in Uganda is largely informal and underfunded and therefore has not taken its place in the development arena of the Country. The Ministry of Gender, Labour and Social Development should implement the Action Plan for the

Creative Economy so that the sector can be better coordinated and formalised and therefore attract the attention and funding that it deserves. The plan will also enhance professionalism which is lacking in the sector.

5. The capacity in the Culture and Creative Industries in Uganda is inadequate. A significant number of the primary stakeholders are un-trained, un-professional or generally lack skills and therefore cannot compete with their peers in the East African region and globally. Furthermore, the infrastructure is lacking or inaccessible to the primary stakeholder. Other capacities that are lacking are in form of knowledge and equipment including ICT. The Ministries responsible for culture, trade, ICT and finance should develop and implement a capacity building plan for the actors in the culture and creative industries so that the sector can become more competitive and contribute significantly to Uganda's Vision 2040.

6. The Survey findings indicate that although the Culture and Creative Industry products have penetrated the regional and global market, the problem of markets and marketing still persists. Coupled with this is the reality that most of the enterprises are small and therefore cannot meet the demands of a global market. The Ministry of Trade, Industry and Cooperatives and the Uganda Export Promotion Board should support the identification of markets and build capacities to meet the demand of the regional and global markets. This could be achieved through the development and management of producer clusters. Furthermore, the capacities of primary stakeholders should be built to use modern marketing methods.

7. Investment in the culture and creative industries is limited. The Ministry responsible for trade, the Private Sector Foundation and the Uganda Investment Authority should ensure that they attract and sustain local and international investment in the sector. The sector is dogged with micro, small and medium enterprises whose impact on the economy is limited. Sub-sectors such as film can only realize their potential if there is a sizeable investment in their operations. With adequate support including investment incentives and infrastructural development, the investors would make a profit and benefit the sector as well.

8. Uganda has only three recognized collective management organizations. These are; the Uganda Performing Right Society, the Reproduction Rights Organization and the Uganda Federation of Movie Industry. These are responsible for collecting and distributing royalties in the music,

books and film sub-sectors. They are also at the fore-front of the protection of the intellectual property of their stakeholders against piracy which is still rampant in Uganda. These institutions should be supported by the Ministry of Justice and Constitutional Affairs, the Ministry of Trade, Industry and Cooperatives, the Ministry of Internal Affairs, the Ministry of Gender, Labour and Social Development and the Ministry of Finance, Planning and Economic Development to enhance the protection of Intellectual Property Rights of creative artists. Their most urgent request is provision of intellectual property police and inspectors.

9. Arts Education is critical for the sustenance of culture and creative industries. Therefore, advocacy for arts education in educational institutions at all levels should be sustained. Additionally, the Ministries of Gender, Labour and Social Development and the Ministry of Education and Sports should influence the curriculum in educational Institutions so that skills in the industry are enhanced. For instance, a course in culture economy should be introduced at tertiary level and the curriculum at primary and secondary level should ensure that all students undertake a creative subject so that creativity in the populace is increased for the betterment of the Creative Economy and the Country at large.

10. Intangible Cultural Heritage is the basis for the cultural product. The Ministry of Gender, Labour and Social Development, the Ministry of Tourism, Wildlife and Antiquities and the Ministry of Finance, Planning and Economic Development should therefore support and engage Local Governments and Traditional/ Cultural Institutions in the protection and promotion of Intangible Cultural Heritage.

11. The performance of culture and creative industries in the East African region varies. The Ministry in charge of East African Community Affairs in collaboration with the East African Community Secretariat should ensure continuous exchanges among practitioners to enhance learning. Joint projects across the region should also be encouraged.

APPENDICES

Appendix I: Persons who participated in the Survey

S/No	NAME	S/NO	NAME
	Interviewers		
1	Akiteng Deborah	17	Madyemu Francis
2	Alexandra Bagonza	18	Matovu Edward
3	Aluma Christine M	19	Mayanja Ivan Wills
4	Atukunda Lillian	20	Mary Atai
5	Aremwaki Pamela	21	Mukasa Joseph
6	Ediruma Edward Eric	22	Nakintu Proscovia
7	Ekwau Hellen	23	Nakyambade Jane G
8	Etoma Charles	24	Nalule Olivia
9	Gimui Dan	25	Nalwoga Sarah
10	Kadogo Kenneth M	26	Nandutu Rose Netalisire
11	Kalebbo Andrew	27	Nansubuga Margaret
12	Katumba James	28	Nuwagaba Winnie K
13	Kemigisha Juliet	29	Tabingwa Joyce Alice
14	Kibuuka Ambrose W	30	Wamoka Job
15	Kyomuhangi Grace	31	Ruyondo Elias
16	Lubale Allen	32	Yafesi Kuluhiira
	Review Team		**Technical Team**
1	Andrew Mukulu (UBOS)	1	Amos Tindyebwa (MGLSD)
2	Edward Sebina (MEACA)	2	Amutenda Salvatore (MEACA)
3	Naumo Juliana Kuruhiira (MGLSD)	3	Dorcas N. Halango (UBOS)
		4	Margaret Hellen Atiro (UBOS)
		5	Bob Okua (UBOS)
		6	Pamela Batenga (MGLSD)

Appendix II: Questionnaires

Institutional Questionnaire

(Organization/Institutional)

FOR THE MAPPING STUDY OF CULTURE AND CREATIVE INDUSTRIES IN EAC

We would like to request you to provide your response on issues presented in this questionnaire. The responses provided will be treated with utmost confidentiality and will facilitate policy making on Culture and Creative industries in the East African Community (EAC).

SECTION A: GENERAL INFORMATION

A1	QUESTIONNAIRE NUMBER.	|__|__|__|__|__|		
A2	Name of the interviewer:	……………………	Code	Skip
A3	Date of the interview	___\ ____ \ 2012 (DD\MM\YYYY)		
A4	Country	1. Kenya 2. Rwanda 3. Uganda 4. Burundi 5. Tanzania	1 2 3 4 5	
A9	Name of the Supervisor			
A11	Time Interview started	[__|__:__|__] AM/PM		
A12	Time Interview Ended	[__|__:__|__] AM/PM		

SECTION B: ABOUT YOUR ORGANIZATION /INSTITUTION

			Code	Skip
B1	Name of the institution			
B2	Contacts of the institution	District: __________ Postal Address:__________ Telephone:_________________ Fax: Email:____________________ Website: _________________		

B3	Name of the Respondent: (optional)			
B4	Title/role of Respondent:			
B5	Sex:	1.Male	1	
B6	Contact details of the respondents	Postal Address:_____________ Telephone:________________ Email:___________________		
B7	Education level of the respondent	1. Certificate 2. Diploma 3. Degree and above	*1* *2* *3*	
B8	For how long have you been working with this institution	______Years ______Months		
B9	When was your organization/ Institution established?	_____/______(MM/YYYY)		
B10	Is your organization/institution registered with the registrar of companies/organization	1. Yes 2. No 3. Don't know	1 2 3	 ➔C1 ➔C1
B11	If yes, when was it registered	_____/______(MM/YYY)		
B12	Under what category is your organization/institution managed/registered	1.Sole proprietorship 2.Partnership 3.Private Company 4.Public Company Others specify…	1 2 3 4 5	

SECTION C: CULTURAL PRODUCTIVE/ECONOMIC ACTIVITY

<table>
<tr><td>C1</td><td>Please circle the MAIN activity domain of Culture and Creative industry that best describes your organization/institution.</td><td>1. Cultural and Natural Heritage
2. Books and Press:
3.Performing Arts Celebrations
4.Visual arts and crafts:
5.Audiovisual and Interactive Media
6. Design and Creative services:
7. Culture Tourism:
8. Intangible Cultural Heritage:
9. Other; please specify: ……………</td><td>1
2
3
4
5
6
7
8
9</td><td></td></tr>
<tr><td>C2</td><td>Please, list all the specific Cultural Productive/Economic activity your organization/Institution undertakes in the domain in C1 above. E.g. Sound recording, Music publishing, Manufacture of music instruments etc</td><td>1……………………………………………………………………
2……………………………………………………………………
3……………………………………………………………………
4……………………………………………………………………
5……………………………………………………………………
6…………………………………………………………………..</td><td></td><td></td></tr>
<tr><td>Bc3</td><td>How many employees do you have in your organization/institution who under take cultural productive/Economic activities?</td><td><table><tr><td></td><td colspan="2">Skilled</td><td colspan="2">Unskilled</td></tr><tr><td></td><td>Male</td><td>female</td><td>male</td><td>female</td></tr><tr><td>Permanent</td><td></td><td></td><td></td><td></td></tr><tr><td>Temporary</td><td></td><td></td><td></td><td></td></tr><tr><td>Volunteer</td><td></td><td></td><td></td><td></td></tr></table></td><td></td><td></td></tr>
<tr><td>C4</td><td>What is the coverage of your cultural productive/Economic activities?</td><td>1.Local
2.National
3.Regional (EAC)</td><td>1
2
3</td><td>➔C13
➔C13
</td></tr>
</table>

		4.International	4	
C5	If Regional/international, In what countries does the organization/institution sell its products	**1.**………………………………………………………. **2.**………………………………………………………. **3.**………………………………………………………. **4.**……………………………………………………….		
C6	If Regional/international, What was your estimated total revenue from foreign sales in the last 12 months in USD.	1. 0-5,000 2.5,000-10,000 3.10,000-50,000 4.50,000-100,000 5.100,000-500,000 6.Above 500,000	*1* *2* *3* *4* *5* *6*	
C7	Basing on the last 12 months, what was your annual revenue/income from the productive/economic activity in USD	1. 0-5,000 2. 5,000-10,000 3. 10,000-50,000 4. 50,000-100,000 5. 100,000-500,000 6. Above 500,000	*1* *2* *3* *4* *5* *6*	
C8	Basing on the last 12 months, what was your annual budget/expenditure on productive/economic activity in USD	1.0-5,000 2.5,000-10,000 3.10,000-50,000 4.50,000-100,000 5.100,000-500,000 6.Above 500,000	*1* *2* *3* *4* *5* *6*	

C9	What is the main source of funding/income for your Cultural productive/economic activity?	1.Government subvention 2.Private fund raising 3.Sales/Performances 4.Sponsorships 5.Development partners 6.Others specify	*1* *2* *3* *4* *5* *6*	
C10	On a scale of 0 to 5, How do you score the contributions of each of the sources in C9 to your revenue? ***5 (highest) and 0 (no funding)***	(see score table below)		

	score
Government subvention	
Private fund raising	
Sales/Performances	
Sponserships	
Development partners	
Others specify	

SECTION D: CULTURE AND CREATIVE INDUSTRIES STATISTICS

			Code	Skip
D1	Does your organization/institution keep its own data /records? *Please circle*	1.Yes 2.No 3.Don't know	1 2 3	
D2	Is your organization collecting data on cultural/creative industries? *Please circle*	1.Yes 2.No 3.Don't know	1 2 3	→D3 →D2 →E1
D3	If no, why don't you collect such data	**a)** ………………………………………. **b)** ………………………………………. **c)** ………………………………………. **d)** ………………………………………. **e)** ………………………………………. **f)** ……………………………………….		→E1

<table>
<tr><td>D4</td><td>If yes, please indicate which modes of cultural/creative industry data collection method your institution uses.</td><td><table>
<tr><td></td><td>Frequency</td></tr>
<tr><td>Administrative data</td><td></td></tr>
<tr><td>System of National accounts</td><td></td></tr>
<tr><td>Business surveys</td><td></td></tr>
<tr><td>Census</td><td></td></tr>
<tr><td>Labour Force Surveys</td><td></td></tr>
<tr><td>Household expenditure surveys</td><td></td></tr>
<tr><td>Time use surveys</td><td></td></tr>
<tr><td>Visitor surveys</td><td></td></tr>
<tr><td>Others, specify</td><td></td></tr>
</table>
Frequency Codes: 1=Monthly, 2=Yearly, 3=after 2 years, 4=after 5 years, 6= after 10 years, 6=occasionally</td><td></td><td></td></tr>
<tr><td>D5</td><td>Are there any challenges you encounter in collecting/using the data?</td><td>1.Yes
2.No
3.Don’t know</td><td>1
2
3</td><td>
➔E1
➔E1</td></tr>
<tr><td>D6</td><td>If Yes, what challenges</td><td>a) ………………………………………………….
b) ………………………………………………….
c) ………………………………………………….
d) ………………………………………………….
e) ………………………………………………….
f) ………………………………………………….</td><td></td><td></td></tr>
</table>

SECTION E: MARKETING STRATEGIES AND EXPERIENCES

			Code	Skip
E1	What are major forms of communication used in conducting business in your organization/institution? ***Circle all that you use.***	1.Telephone 2.Fax 3.Internet 4.Post office 5.Radio	*1* *2* *3* *4* *5*	

		6.Television 7.News Paper/Magazines 8. Other Specify ……………………	*6* *7* *8*	
E2	Do you have a website. ***Circle***	1.Yes 2.No 3.Don't know	*1* *2* *3*	 ➔E4 ➔E4
E3	If yes, what do you use your organizational website for? ***Circle***	1.Information sharing 2.Marketing 3.Advocacy 4.Sales 5.Fund raising 6.Networking 7.Show casing 8. Other specify:………….………………………………………	*1* *2* *3* *4* *5* *6* *7* *8* *9*	
E4	What are the common marketing/advertising strategies you use? ***Circle***	1.Internet adverts 2.Radio adverts 3.Community groups 4.Word of mouth 5.Billboards/posters 6.TV adverts 7.News Paper/Magazines pullouts 8.Sponsoring events 9.Others, specify______________	*1* *2* *3* *4* *5* *6* *7* *8* *9*	

E5	What challenges do you face/encounter affecting the performance of your main cultural productive/Economic activities? ***Circle.***	1.Financial constraints 2.Limited human capacities 3.Lack of equipment 4.Lack of publicity 5.Insecurity 6.Limited market 7. Others, specify…………………………………………………………	*1* *2* *3* *4* *5* *6* *7*	
E6	How do you address these challenges listed above? ***Write***	**a)** ………………………………………. **b)** ………………………………………. **c)** ………………………………………. **d)** ………………………………………. **e)** ………………………………………. f) ……………………………………….		
E7	As an organization/institution, list four main opportunities in the domains you are dealing with. ***Write***	**a)** ………………………………………. **b)** ………………………………………. **c)** ………………………………………. **d)** ………………………………………. **e)** ………………………………………. f) ……………………………………….		
E8	Please make recommendations on how your organization can improve in the performance of its cultural productive/Economic activities. ***Write***	**For Government** **a)** ………………………………………. **b)** ………………………………………. **c)** ………………………………………. **d)** ………………………………………. **e)** ………………………………………. **f)** ………………………………………. **For Private Sector** **a)** ………………………………………. **b)** ………………………………………. **c)** ………………………………………. **d)** ………………………………………. **e)** ………………………………………. f) ………………………………………. **For Development Partners/Internationally** **a)** ………………………………………. **b)** ………………………………………. **c)** ……………………………………….		

		d) ………………………………………. **e)** ………………………………………. f) ………………………………………..		

Individual Questionnaire

EAST AFRICAN COMMUNITY SECRETARIAT

QUESTIONNAIRE

(*Individual)*

FOR THE MAPPING STUDY OF CULTURE AND

CREATIVE INDUSTRIES IN EAC

We would like to request you to provide your response on issues presented in this questionnaire. The responses provided will be treated with utmost confidentiality and will facilitate policy making on Culture and Creative industries in the East African Community (EAC).

SECTION A: GENERAL INFORMATION

A1	QUESTIONNAIRE NUMBER.	|__|__|__|__|__|		
A2	Name of the interviewer:	……………………	Code	Skip
A3	Date of the interview	__\\ ___ \\ 2011 (DD\MM\YYYY)		
A4	Country	1.Kenya 2.Rwanda 3.Uganda 4.Burundi 5.Tanzania	1 2 3 4 5	
A5	District/Province			
A9	Name of the Superior			
A11	Time Interview started	[__|__:__|__] AM/PM		
A12	Time Interview Ended	[__|__:__|__] AM/PM		

SECTION B: RESPONDENTS CONTACT DETAILS

			Code	Skip
B1	Name of the Respondent: **(optional)**			
B2	Sex:	1.Male 2.Female	1 2	
B5	Title of Respondent:			
B6	Postal Address:			
B7	Telephone			
B8	Email:			

SECTION C: CULTURAL PRODUCTIVE/ECONOMIC ACTIVITY

			Code	Skip
C1	Please circle the one domain/category of Culture and Creative industry that best describes your main Cultural Productive/Economic activity. ***Circle***	1.Cultural and Natural Heritage 2.Books and Press: 3.Performing Arts Celebrations 4.Visual arts and crafts: 5.Audiovisual and Interactive Media 6.Design and Creative services: 7.Culture Tourism: 8.Intangible Cultural Heritage: 9. Other; please specify: …………..	1 2 3 4 5 6 7 8 9	
C2	Please, list all the Cultural Productive/Economic activity you under take in the domain circled above: Sound recording, music publishing etc .***Write***	a) …………………………………….. b) …………………………………….. c) …………………………………….. d) …………………………………….. e) ……………………………………..		
C3	Is the Cultural productive Activity you indicated in C1 above your **MAIN** activity? ***Circle***	1.Yes 2.No	1 2	 ➔C7
C4	If Yes, How many hours of your working time do you spend on this activity daily? ***Write in 24 hour clock***	______________hours		
C5	Do you have any formal training in the Cultural productive activity you are engaged in? ***Circle***	1.Yes 2.No	1 2	 ➔C7
C6	If Yes, what is you highest level of qualification? ***Circle***	1.Certificate 2.Diploma	1 2	➔C8 ➔C8

		3.Degree and above	3	➔C8
C7	If No, how did you acquire your skill? ***Circle***	1.Self -training 2.Apprentiship 3.Traditional Cultural Academy 4.Others, Specify	1 2 3 4	
C8	For how long have you practiced your current Cultural productive activity/ business?	________________Years ________________Months		
C9	What is the coverage of your Cultural productive/economic activity? ***Circle***	1.Local 2.National 3.Regional (EAC) 4.International	1 2 3 4	
C10	Considering the last 12 months, How much revenue in USD did you get from the productive/economic activity you are involved in. ***Circle***	1.0-5,000 2.5,000-10,000 3.10,000-50,000 4.50,000-100,000 5.100,000-500,000 6.Above 500,000	1 2 3 4 5 6	
C11	In the last 12 months, what was your estimated budget/expenditure***? Circle the range where the revenue falls***	1. 0-5,000 2. 5,000-10,000 3. 10,000-50,000 4. 50,000-100,000 5. 100,000-500,000 6. Above 500,000	1 2 3 4 5 6	
C12	What is the main source of funding/income for your Cultural productive/economic activity? ***Circle***	1.Government subvention 2.Private fund raising	1 2	

		3.Sales/Performances 4.Sponsorships 5.Development partners 6.Others specify	3 4 5 6	
C13	On a scale of 0 to 5, How do you score the contributions of each of the sources in C9 to your revenue? ***5 (highest) and 0 (no funding)***	<table><tr><td></td><td>score</td></tr><tr><td>Government subvention</td><td></td></tr><tr><td>Private fund raising</td><td></td></tr><tr><td>Sales/Performances</td><td></td></tr><tr><td>Sponserships</td><td></td></tr><tr><td>Development partners</td><td></td></tr><tr><td>Others specify</td><td></td></tr></table>		
C14	Other than the cultural productive activities, are there any other services or products that you market/sale. ***Circle***	1.Yes 2.No	1 2	 ➔D1
C15	If Yes, what products/services. ***Write***	a) .... b) .... c) .... d) .... e)		
C16	Where do you sell these products? ***Circle***	1.Local 2.National 3.Regional 4.International	1 2 3 4	
C17	If Regional/international, which countries do you sale these products to? ***Write***	a) .... b) .... c) .... d) .... e)		

C18	If Regional/international, what is your estimated total revenue in USD from these sales? ***Circle***	1.0-5,000 2.5,000-10,000 3.10,000-50,000 4.50,000-100,000 5.100,000-500,000 6.Above 500,000	1 2 3 4 5 6	

SECTION D: MARKETING STRATEGIES

			Code	Skip
D1	Please circle four major communication channels that you use in your cultural business? ***Circle***	1.Telephone 2.Fax 3.Internet 4.Post office 5.Radio 6.Television 7.News Paper/Magazines 8.Other Specify	1 2 3 4 5 6 7 8	
D2	Do you have a website? ***Circle***	1.Yes 2.No	1 2	 ➔D4
D3	What do you use your website for?	<table><tr><td></td><td>1.Yes</td><td>2.No</td></tr><tr><td>Information</td><td></td><td></td></tr><tr><td>Marketing</td><td></td><td></td></tr></table>		

		Fundraising | | Advocacy | | Sales | | Show casing | | Other Specify | |		
D4	Please circle four main challenges affecting your performance in the domain(s) selected in C1 above. ***Circle***	1.Financial constraints 2.Limited human capacities 3.Lack of equipment 4.Lack of publicity 5.Insecurity 6.Limited market 7. Others, specify……………………………………………………….	1 2 3 4 5 6 7	
D5	What do you see as the four main opportunities for your cultural productive/economic activity in the domain you selected in C2? ***Write***	a) …………………………………………………………… b) ……………………………………………………………. c) ……………………………………………………………. d) …………………………………………………………….		
D6	Please make recommendations on how you think you can improve production of your cultural productive/Economic Activity you indicated in C2.	a) …………………………………………………………… b) ……………………………………………………………. c) ……………………………………………………………. d) …………………………………………………………….		

THANK YOU FOR YOUR RESPONSE.

Appendix III: Other Tables

Table 1: Percent distribution of institutional respondents by selected background characteristics

Characteristics	Cultural and Natural Heritage	Books and Press	Perfor-ming Arts and Celebr ation	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Sports and Recreat ion	Total
Sex										
male	61.1	52.5	90.0	69.5	84.4	51.3	62.9	42.9	88.4	69.9
female	38.9	47.5	10.0	30.5	15.6	48.7	37.1	57.1	11.6	30.1
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**31**	**2,597**	**23**	**2,088**	**4,850**	**1,727**	**151**	**206**	**800**	**12,472**
Level of education										
no schooling	11.1	1.6	0.0	6.8	2.5	11.8	0.0	42.9	7.0	5.3
primary certificate	11.1	3.3	20.0	15.3	14.8	25.0	0.0	14.3	25.6	14.4
o level certificate	27.8	6.6	10.0	15.3	16.4	6.6	5.7	28.6	11.6	12.6
a level certificate	11.1	6.6	5.0	20.3	5.7	13.2	14.3	0.0	16.3	10.1
post-secondary certif	0.0	13.1	5.0	8.5	4.1	4.0	0.0	0.0	2.3	6.5
diploma	22.2	23.0	15.0	11.9	16.4	10.5	17.1	0.0	16.3	15.9
degree and above	16.7	39.3	45.0	17.0	36.9	27.6	62.9	14.3	20.9	31.7
other	0.0	6.6	0.0	5.1	3.3	1.3	0.0	0.0	0.0	3.7
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**31**	**2,597**	**23**	**2,088**	**4,850**	**1,727**	**151**	**206**	**800**	**12,472**
Duration of Service										
Less than 1 Year	5.6	3.3	10.0	5.1	6.6	1.3	0.0	14.3	9.3	5.1
1-5 Years	16.7	52.5	40.0	40.7	51.6	42.1	60.0	28.6	62.8	49.0
6-10 Years	44.4	16.4	15.0	27.1	27.9	26.3	28.6	14.3	16.3	24.2
11-20 Years	11.1	21.3	20.0	23.7	13.1	21.1	11.4	14.3	9.3	17.5
Over 20 years	22.2	6.6	15.0	3.4	0.8	9.2	0.0	28.6	2.3	4.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**31**	**2,597**	**23**	**2,088**	**4,850**	**1,727**	**151**	**206**	**800**	**12,472**

Distribution of individuals by gross revenue/income from culture specific activities

	Domain								
	Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Total
USD 0 - 5,000	46.2	80.0	85.7	73.3	100.0	84.6	100.0	90.9	81.4
USD 5,001 - 10,000	15.4	15.0	-	26.7	-	-	-	-	8.8
USD 10,001-50,000	38.5	5.0	-	-	-	15.4	-	9.1	8.8
USD 100,001-500,000	-	-	14.3	-	-	-	-	-	1.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**13**	**20**	**7**	**15**	**22**	**13**	**1**	**11**	**102**

Distribution of individuals by annual budget/expenditure on culture specific activities

	Cultural and Natural Heritage	Books and Press	Performing Arts and Celebration	Visual Arts and Craft	Audio-visual and Inter-active media	Design and Creative Services	Cultural Tourism	Intangible Cultural Heritage	Total
USD 0 - 5,000	69.2	90.5	85.7	100.0	72.7	84.6	100.0	90.9	84.5
USD 5,001 - 10,000	30.8	4.8	0.0	0.0	18.2	7.7	0.0	0.0	9.7
USD 10,001-50,000	0.0	4.8	0.0	0.0	9.1	7.7	0.0	9.1	4.9
USD 100,001-500,000	0.0	0.0	14.3	0.0	0.0	0.0	0.0	0.0	1.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Freq.	**13**	**21**	**7**	**15**	**22**	**13**	**1**	**11**	**103**

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