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CREATIVE INDUSTRIES MAPPING EXERCISE

THE STATISTICAL REPORT

PREPARED FOR
NATIONAL ARTS COUNCIL,
SEYCHELLES (NACS)

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Introduction

The creative industry in Seychelles has considerable potential for development. The recent Creative Industry Policy (April 2012) highlighted the importance of harnessing the creative talents of the Seychellois people, building on the knowledge of the society and extending on the entrepreneurial skills of the community. However areas of concerns such as the image of the industry, lack of material resources and the need to establish a productive link between the Tourism and Culture have also been identified. The need to improve quality, strengthen support and promote the arts has been reiterated throughout the policy document.

In order to provide strategic direction in the implementation of the policy it has become necessary to establish the present developmental status of the creative industry. As a first step the views of the artists themselves have been sought through a comprehensive questionnaire on inputs, processes and outputs. Some of the main inputs to the industry such the people involved, the resources used and the environmental conditions have been considered. The processes involve the whole range of creative activities and the output is concerned with the product and the marketing of those products. In effect the data collected was so extensive that they had to be reduced and combined to produce an initial report that would explain the situation concerning the creative industry, its mode of functioning and its contribution to the economy of the country.

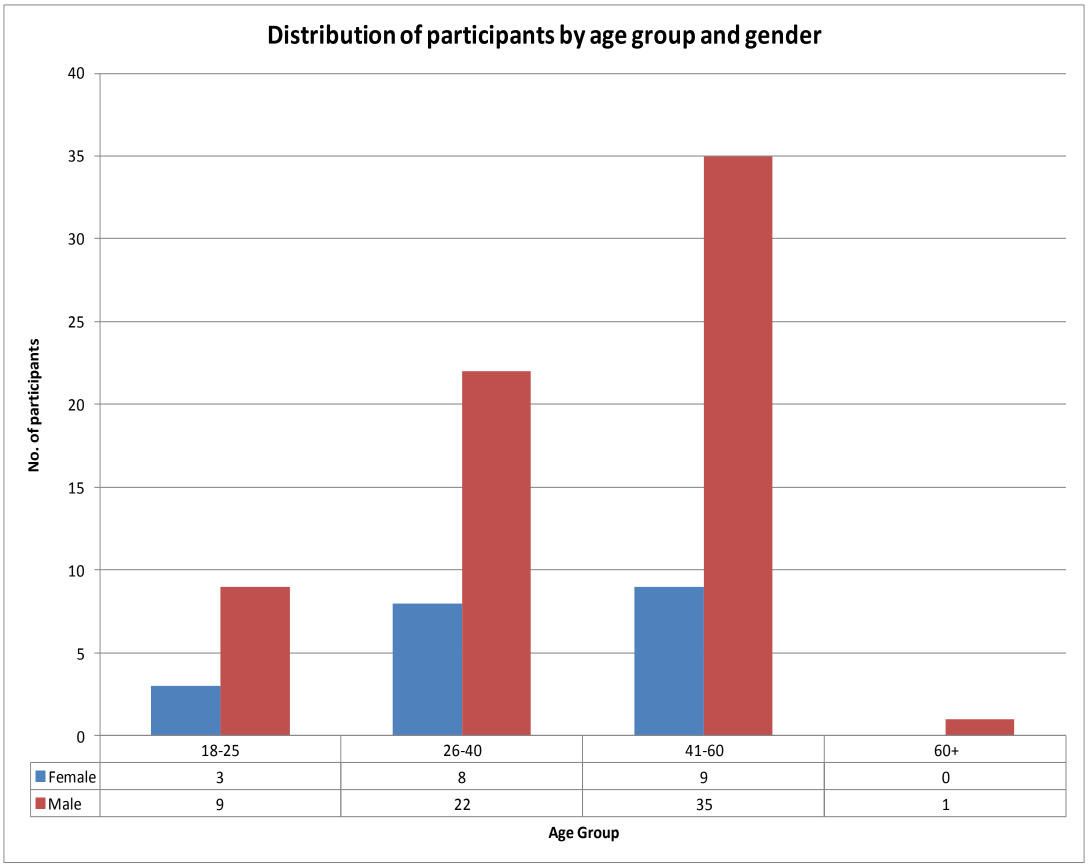
The report which follows has been organised in three sections. In the first section the characteristics of the personal and professional characteristics of the participants, their level and type of participation, and their membership of and views on art associations have been presented. The second section reports on the economic activities of those engaged in the creative business, their business profiles, operation and management, and funding. The analysis in the final section concentrates on the variety of roles undertaken by the participants in the creative industry.

Section 1 - Artists Profiles

Section 1 covers general information relating to the creative industry. For this exercise, 92 creative industry related employees/employers participated and the valid response constitute 24% female and 76% male. As shown below in **Figure 1**, they are distributed according to the age groups 18-25, 26-40, 41-60 and 60+ with an average age of 41 years and each age group dominated by male. It may also be noted that the largest group falls in the age group of 41-60 followed by the age group 26-40, then by the age group 18-25.

The above data indicate that the creative industry is dominated by older men and this may lead to the understanding that the National Arts Council Seychelles (NACS) may need to develop a strategy that will attract more female and youths to join the creative industry otherwise the creative industry may suffer and come to a close.

Figure 1: Per gender and age



	18-25	26-40	41-60	60+
Female	3	8	9	0
Male	9	22	35	1

Domain refers to the area of work the participants are involved with. It should be noted that a participants may be involved with more than one domain as shown below in **figure 2**, but mostly (65%) are involved with a single domain, 30% are involved with 2-5 domains and only 5% are involved with more than 5%.

Figure 2: List of domains and percentage distribution of number of domains involve with

Museum
Archeological & Historical Places
Cultural Landscapes
Natural Heritage
Performing Arts
Music
Festivals, Fairs and Feasts
Fine Arts
Photography
Crafts
Books
Newspaper & Magazine
Other printed matter
Library
Book Fairs
Film & Video
TV, Radio & Internet
Internet podcasting
Video games
Fashion Design
Graphic design
Landscape design
Architectural Services
Advertising Services
Disc Jockey

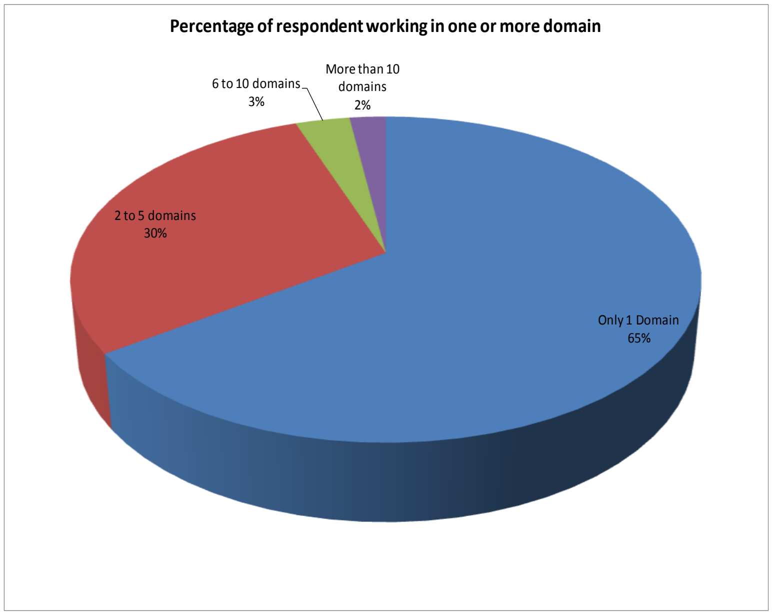


Figure 3 below shows the percentage participation from the different domains. It can be observed that the music domain (38%) is dominant, followed by the fine arts domain (21%), then by the performing arts domain (17%), then photography domain (12%), with the rest contributing less than 10% each. It should be noted that there was no participants from the book fair domain, internet podcasting, video games, and landscape design. A question may need to be asked about the importance of those last three domains and if there is a necessity to make photography more prominent in the creative industry in Seychelles.

Figure 3: Percentage participation from the different domains

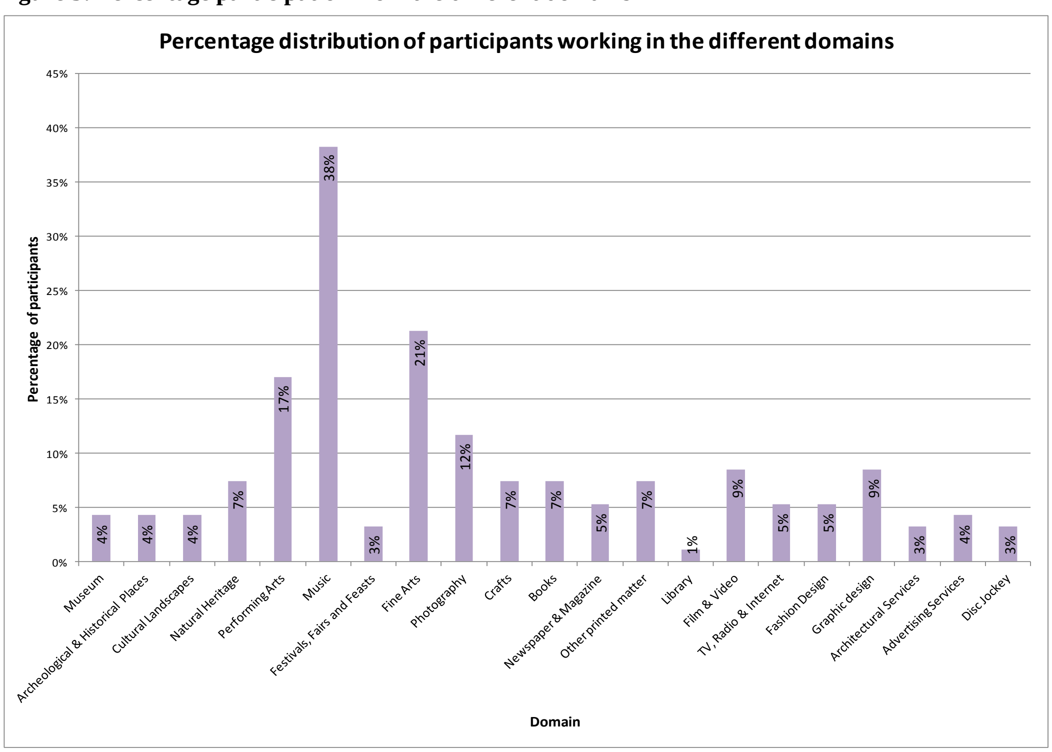
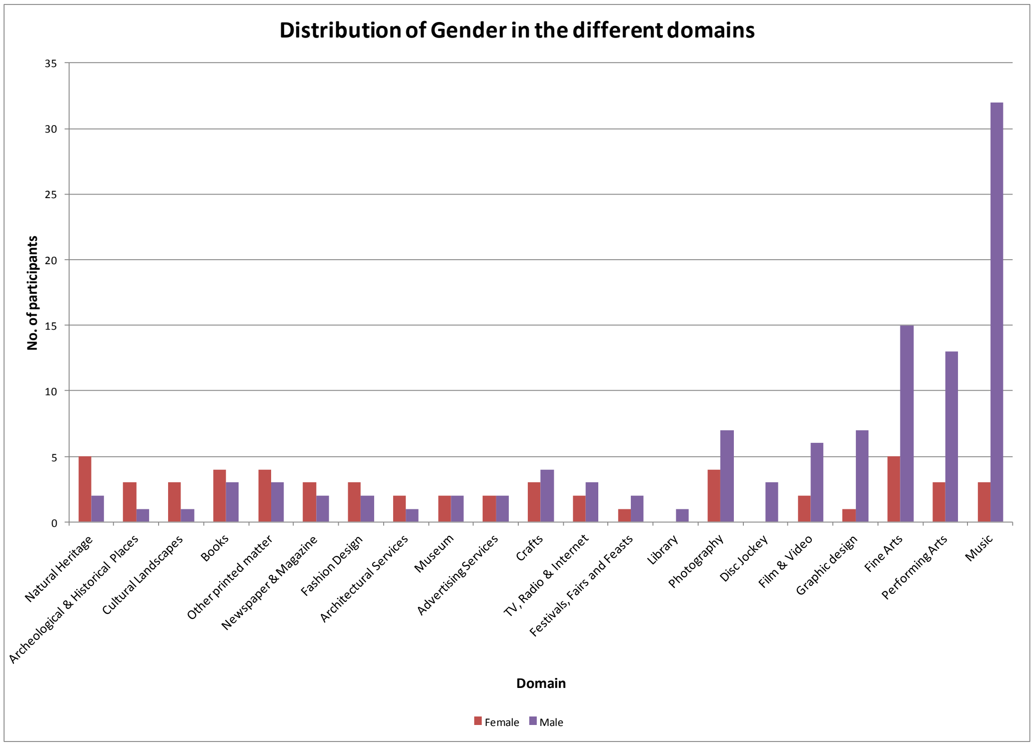


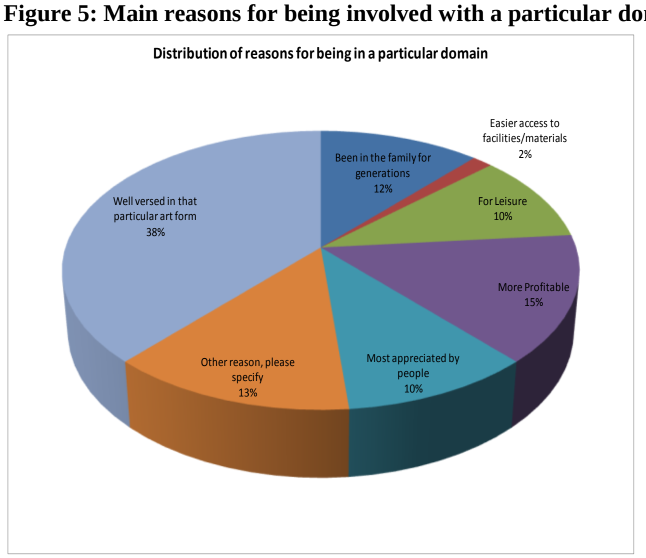
Figure 4 below shows the participation by gender from the different domains which has been presented in order of domains with female domination first. It may be noted that there is a good balance of male and female domination across the different domains (approximately 50% of domains each), with female dominating from the domains Natural Heritage to Architectural services and male dominating from Crafts to Music, and an equal share for Museum and Advertising Services.

Figure 4: Participation by gender from the different domains



The main reasons given for being involved with a particular domain is illustrated below in **figure 5**.

Figure 5: Main reasons for being involved with a particular domain



Competence is the main reason for being in the particular domain (38%), followed by profitability (15%), then by family ties (12%), and then by leisure and the audience appreciation with 10% each.

Other reasons such as work related and the love for the arts contributed significantly (13%).

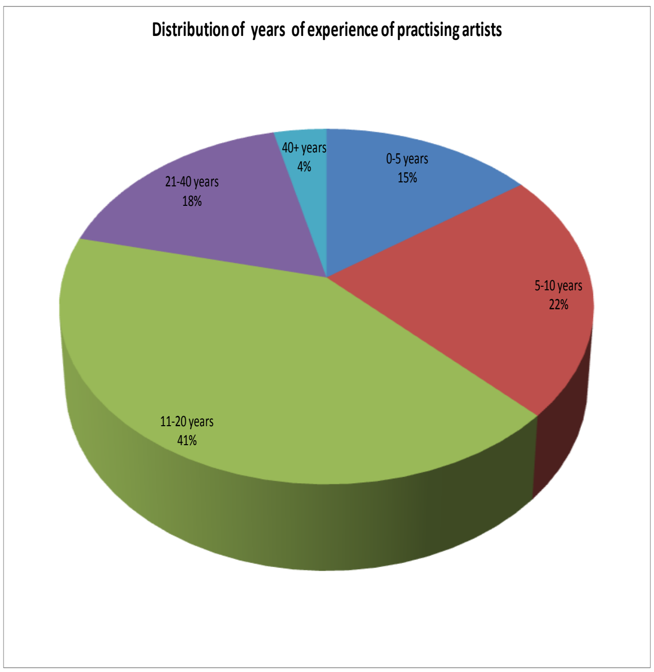
It is worth noting that easy access to facilities to certain domains is also attracting artist practitioners (2%).

Even when looking at reasons given by domain, the more commercially related artistic activities such as Performing Arts, Fine Arts, Photography, Crafts, Books, Printing, and Graphic Design are still dominated by competency, with the exception of music which is dominated by family ties followed by equal share for competency and profitability, and other less commercially related artistic activities such as Museum, Archeological and Historical Places, Cultural Landscapes, Natural Heritages, Library, and Architectural Services which are dominated by other reasons such as work related and the love for the practice.

It is clear that competency and profitability are the main drivers attracting artistic practitioners and, therefore, there is the need to clearly present the opportunity paths to specialisation to the potential artistic practitioner and further develop the market for selling artistic products.

Years of experience as an artist demonstrate a person's commitment to the creative industry.

Figure 6: Commitment to the creative industry



As illustrated in **figure 6** on the left, artists with over 10 years of experience make up 63% of the participants and if over 5 years experience were to be considered a significant number of years of experience, then it would make up 85% of the participants.

Together with an average practicing experience of approximately 14 years, it shows that artists are committed to the creative industry. Given that the artists remain in the creative industry for a relatively long time would mean that this industry is rich in experienced human resources and this would help to bring the full potential development of the industry well within reach.

The information in **Figure 7** below shows that both gender have high commitment towards the creative industry. Female practitioners tend to leave the industry earlier but they still commit up to 20 years of practice which is very significant for any industry.

Figure 7: Commitment to the creative industry by gender

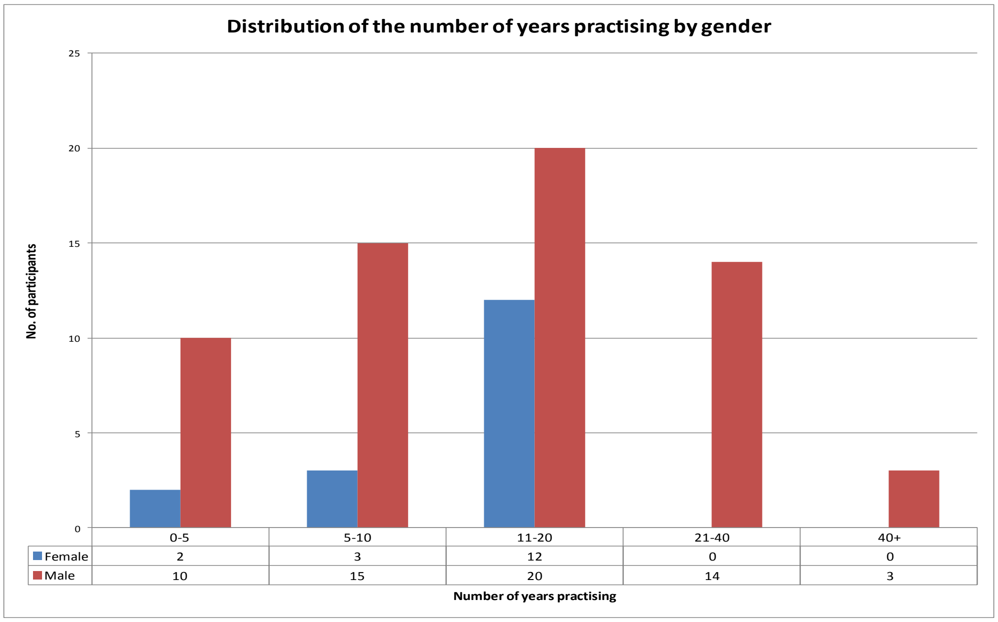
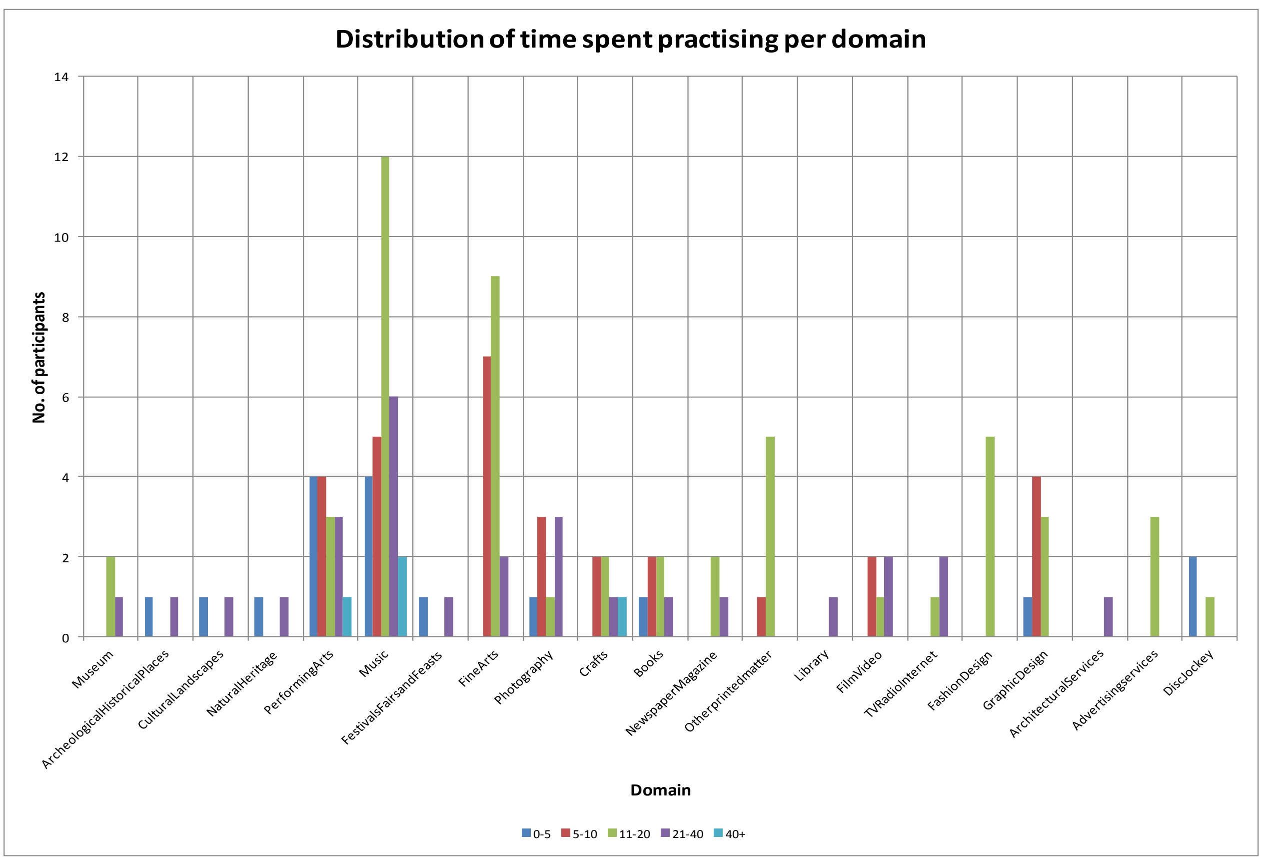


Figure 8 below allows the viewing of the years of experience within the different domains. In most domains, the grouping 11-20 years tends to be most common, including also grouping of 20+ years of experience, showing that the commitment is across all domains.

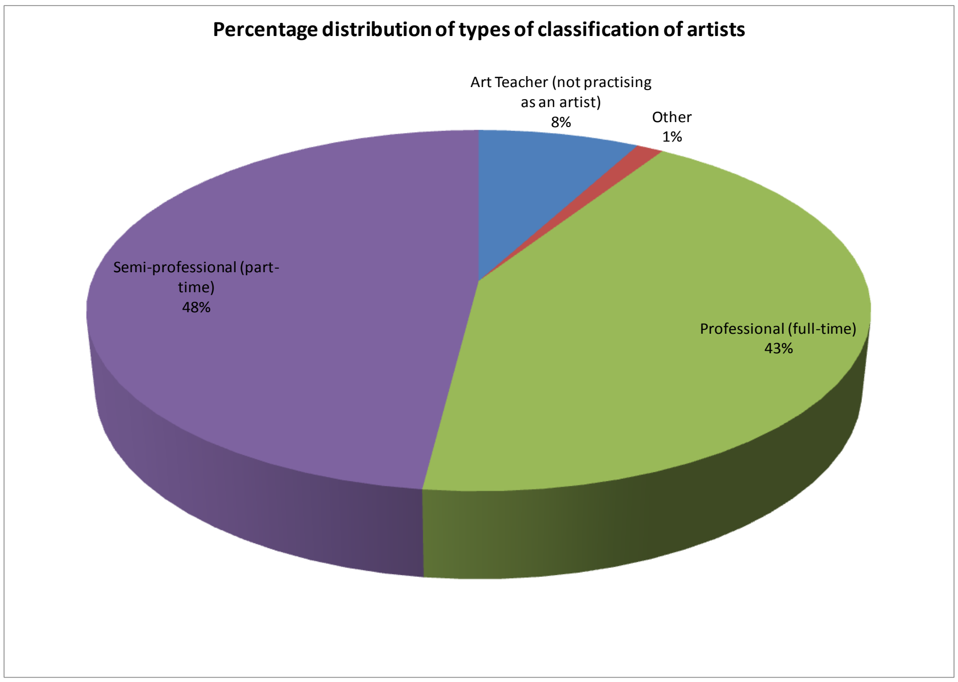
Figure 8: Commitment to the creative industry by domain



Classification of artist demonstrates the kind of time an artist can allocate doing artistic activities. A professional artist dedicates most of his/her time doing artistic activities and therefore referred to as full-time practitioner whereas a semi-professional artist will be doing artistic activities on a part-time basis. Art teachers are not considered a practicing artist but will still do artistic activities when their teaching schedules permit.

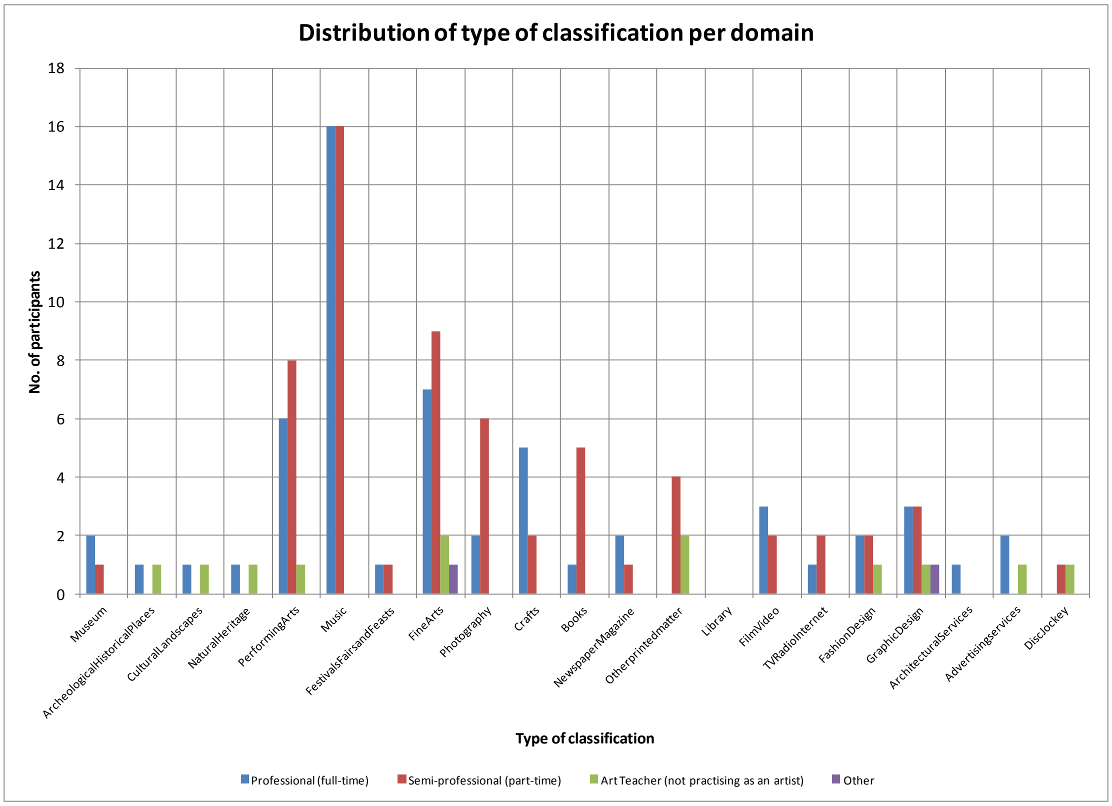
In **Figure 9** below it can be seen that most of the participants are either professional (43%) or semi-professional (48%) making a total of 91% of the participants practicing artist, with a few (8%) being art teachers. Though there is a high percentage of practicing artist, only 43% represents professionals (full-time practitioners). Full-time practitioners are normally better positioned to see through any strategy that the creative industry may see needed and therefore, creating an environment that may encourage conversion from semi-professionals to professionals which will be ideal for further development of the industry. An expansion of the art products market will also be an end result.

Figure 9: Distribution of types of classification of artists



The type of classification of artist by domain in **Figure 10** below shows that professionals (full-time practitioners) appear in most domains, giving the domains equal opportunities in terms of human resources to keep up with the industrial development. Semi-professionals (part-time practitioners) also appear in most domains meaning there can be sufficient support to the professionals for whatever implementation is intended.

Figure 10: Distribution of type of classification of artist by domain



Looking at the type of classification with regards to gender and age group as shown in **Figure 11** and **12**, respectively, classifications professionals and semi-professionals are dominated by male above 25 years. This confirms the initial remark above and it calls for some strategies to encourage more female and youths to join this industry.

Figure 11: Classifications by gender

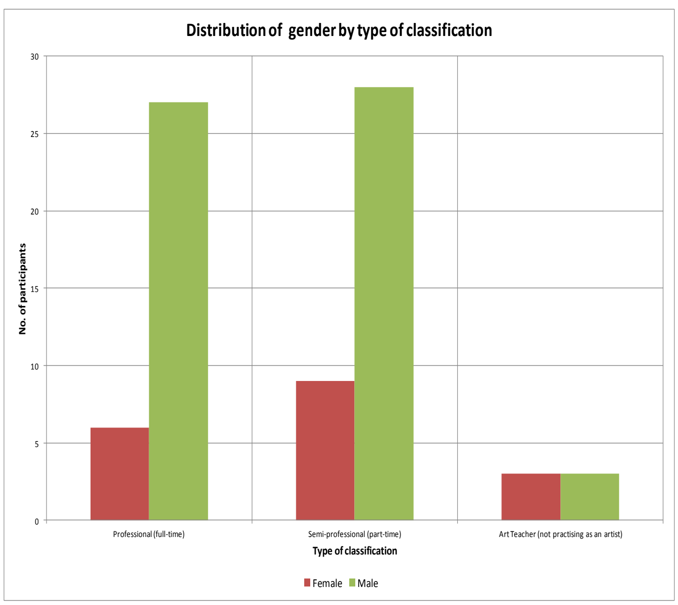
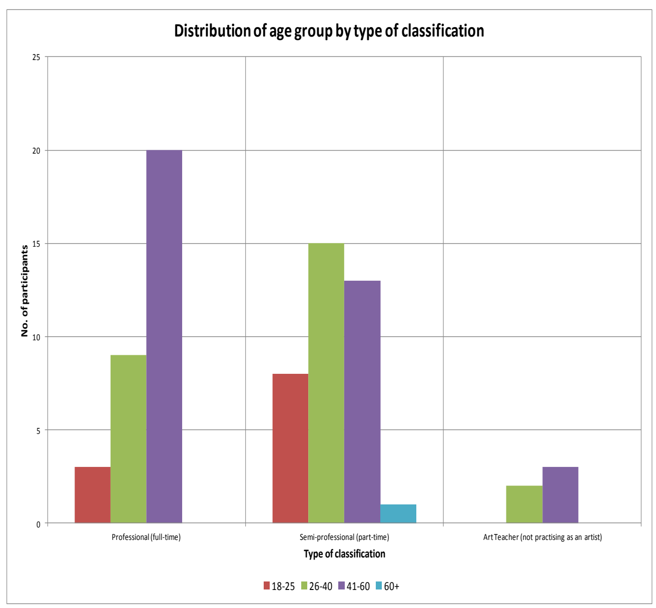
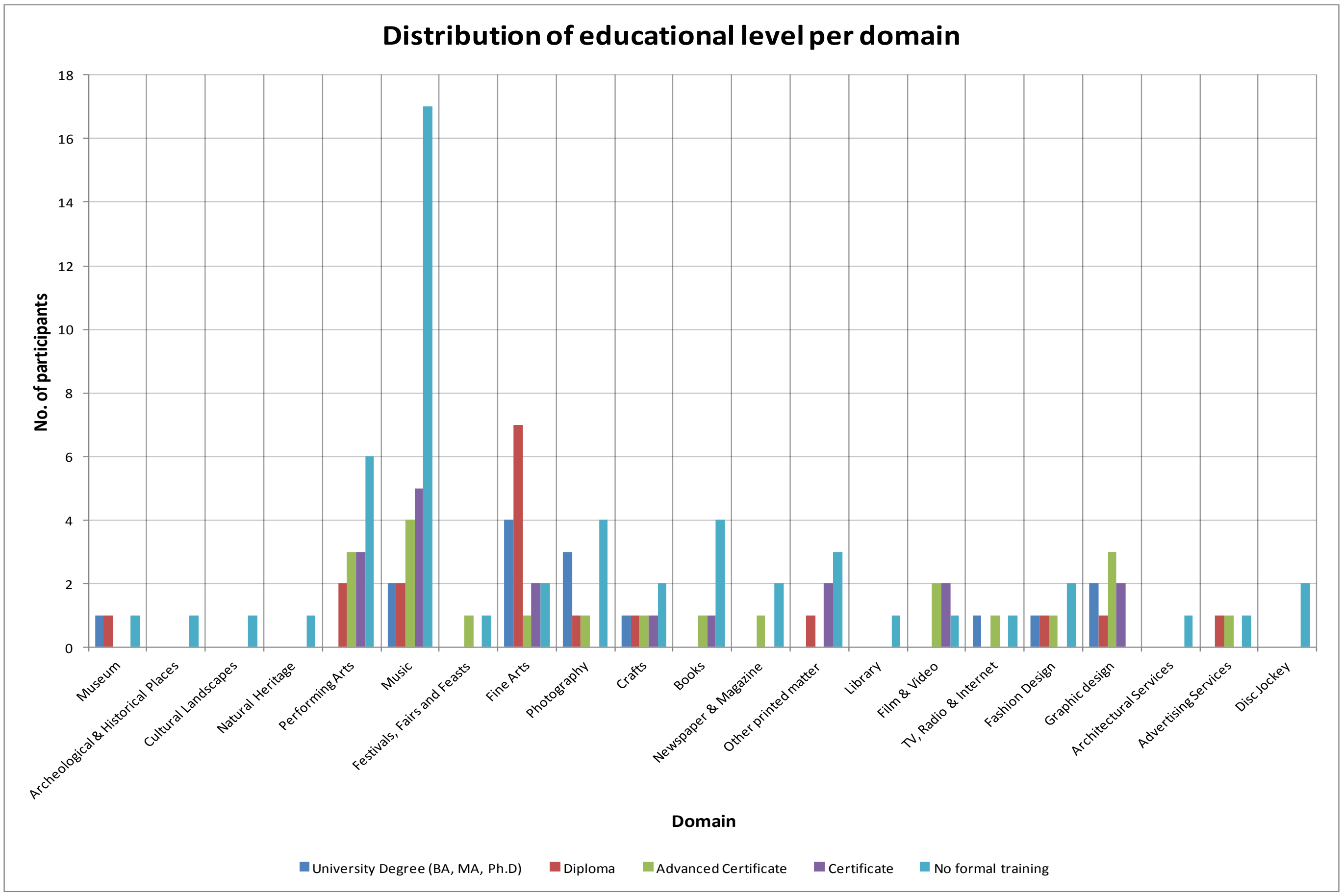


Figure 12: Classifications by age group



Level of education demonstrates the opportunity for potential and practicing artists to be formally trained. Looking at level of education across the different domains as shown in **Figure 13** below, it is fairly clear that most candidates involved are without formal training. They are followed by those with certificates to diploma level with very few having a university degree. This would indicate that the industry relies heavily on candidates without formal training and this might not be the ideal set up. It is important to make available more training opportunities to the potential and practicing artists to increase the number of practitioners with formal training. This should improve the quality of the creative industry in the future.

Figure 13: Level of education by domains



All levels of education are dominated by male as shown in **Figure 14** and of age groups 41-60, followed by 26-40, with very few from 18-25 as shown in **Figure 15**. This shows that only a few new practicing artists are being trained. The training programme for creative industry needs to be reviewed with some emphasis on gender equality.

Figure 14: Level of education by gender

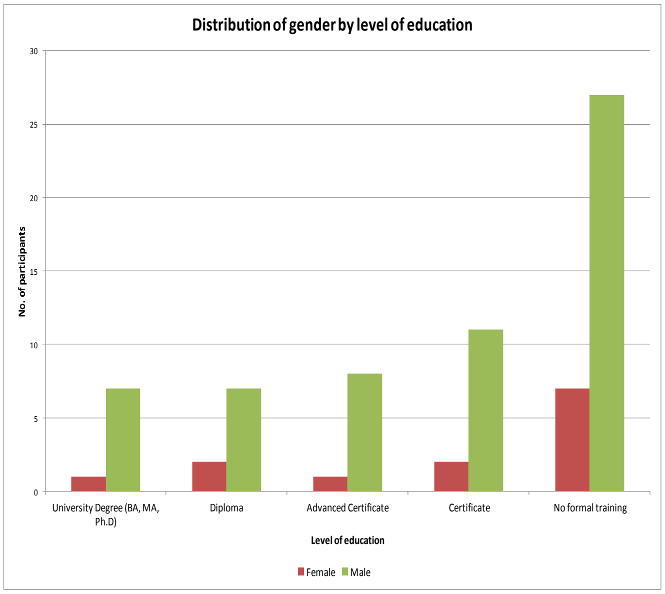
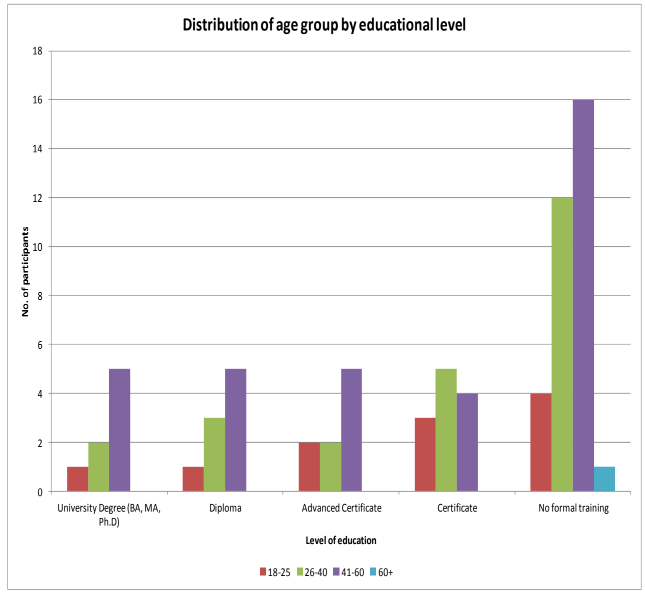
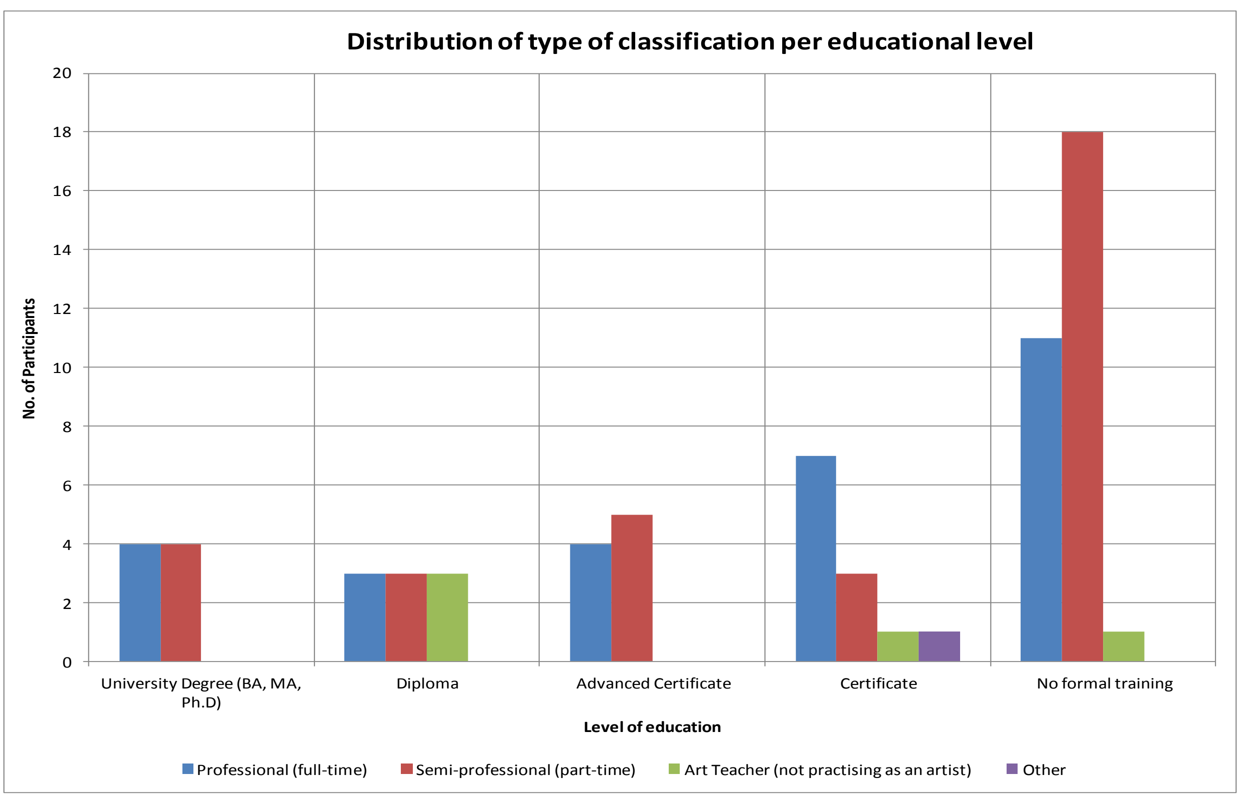


Figure 15: Level of education by age group



With regards to level of education by type of classification, only about 50% of university graduates work as professional (full-time) and even fewer practitioners are diploma and advanced certificate holders as shown in F**igure 16**. This shows that the most qualified artists are not working as professionals (full-time) within the creative industry and as a result this may be a setback for the full development of the industry.

Figure 16: Level of education by the type of classification



It is necessary to prioritize what is most important for the development of each domain. A rating 1 to 10 is being used for prioritization where 1 represents the most essentials and 10 being the least essential. Ratings 1 to 5 are considered as top priorities and **Figure 17** below highlights the top priorities for each domain.

Figure 17: Priorities for each domain

	Marketing	Showcasing	Increased Opportunity	Access to Info	Access to Finance	Networking	Skill Training	Exporting	Startup	Additional Staff
Museum	1	-	8	1	-	1	1	1	1	-
ArcheologicalHistoricalPlaces	-	-	-	-	-	-	-	-	-	-
CulturalLandscapes	-	-	-	-	-	-	-	-	-	-
NaturalHeritage	-	-	-	-	-	-	-	-	-	-
PerformingArts	3	4	5	5	6	6	3	5	4	9
Music	2	3	4	5	-	4	6	6	5	8
FestivalsFairsandFeasts	-	-	-	-	-	-	-	-	-	-
FineArts	3	3	6	4	4	5	2	5	2	7
Photography	3	2	7	5	-	6	1	6	1	9
Crafts	4	5	8	5	5	6	2	5	2	6
Books	5	5	7	5	5	7	4	5	3	9
NewspaperMagazine	8	7	6	5	2	8	3	8	-	7
Otherprintedmatter	5	3	5	5	5	7	4	7	5	10
Library	3	-	-	-	-	-	-	-	-	-
FilmVideo	3	4	6	5	5	9	5	6	4	8
TVRadioInternet	5	5	6	7	6	5	5	8	3	7
FashionDesign	3	5	7	6	3	7	2	6	3	7
GraphicDesign	3	4	6	4	3	6	3	7	3	8
ArchitecturalServices	-	3	-	-	-	-	-	-	-	-
Advertisingservices	4	7	7	6	4	7	2	7	4	7
DiscJockey	1	-	-	-	-	-	-	-	-	-

Arts associations exist to group and provide forum for discussions for the different type of artists. This allows the sharing of views and creates a common understanding and vision for the artists. Participation approach normally results in ownership of any decisions taken and, therefore, a better chance of successful implementation.

Several arts associations have been formed within the creative industry. 48% of the participants belong to at least one art association and they are mainly male, mostly coming from the age group 41-60, followed by 26-40, with a very few coming from the age group 18-25. Encouraging higher participation with a better gender and age groups balance will bring further benefits as highlighted above.

Figure 18 below shows the members' participation in the different arts associations. Associations such as Fashion, Pro-Art, SAMEP, Producers, and Theatre have low participation and therefore practicing artists need to be encourage to join.

Figure 18: Arts Associations with members participation

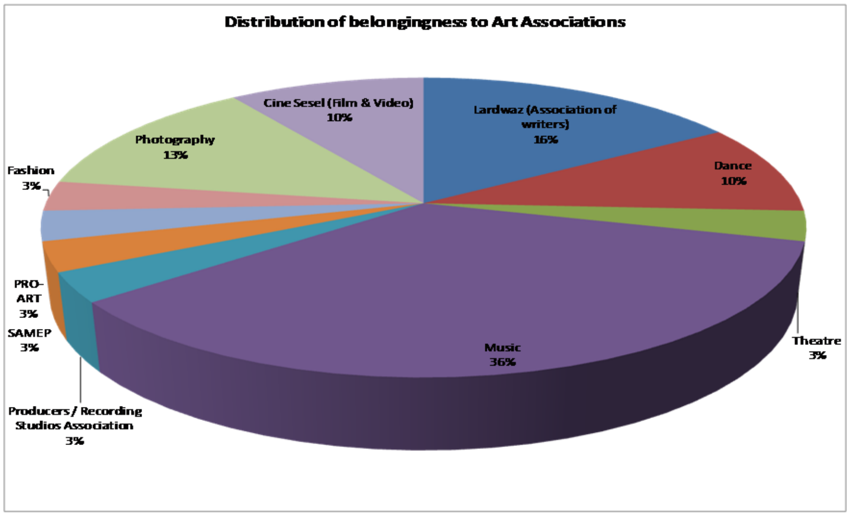
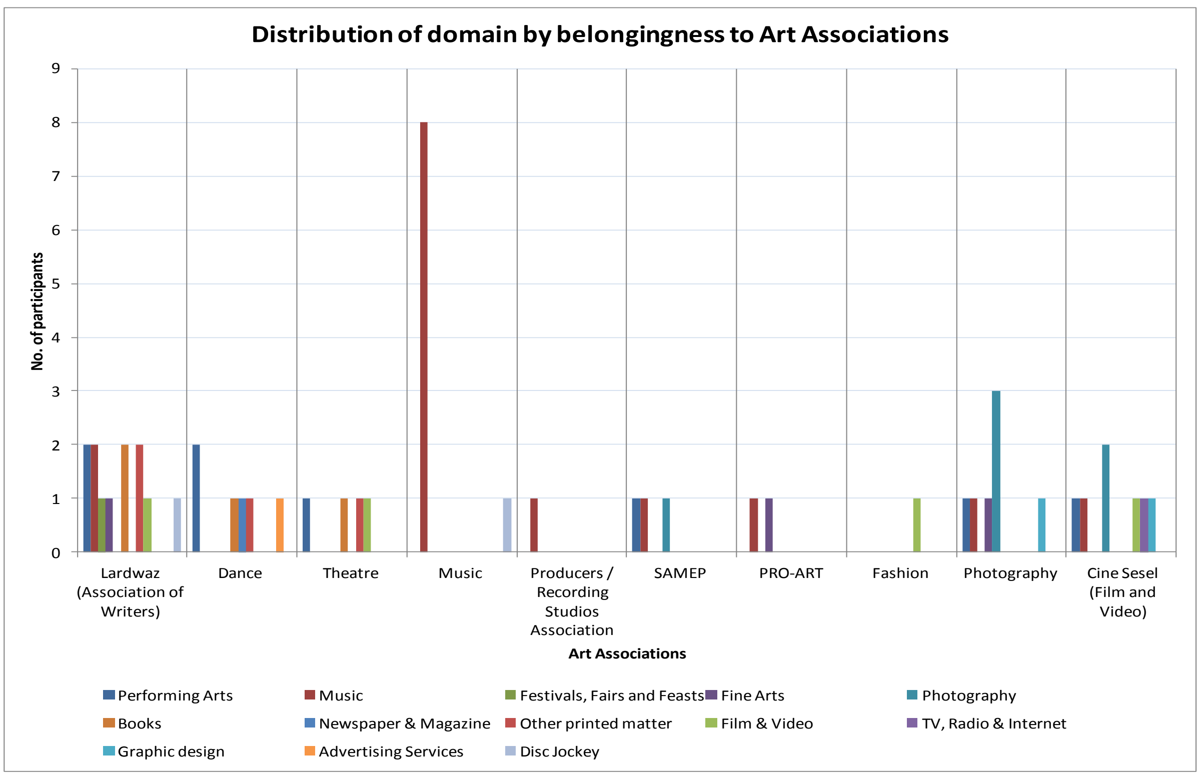


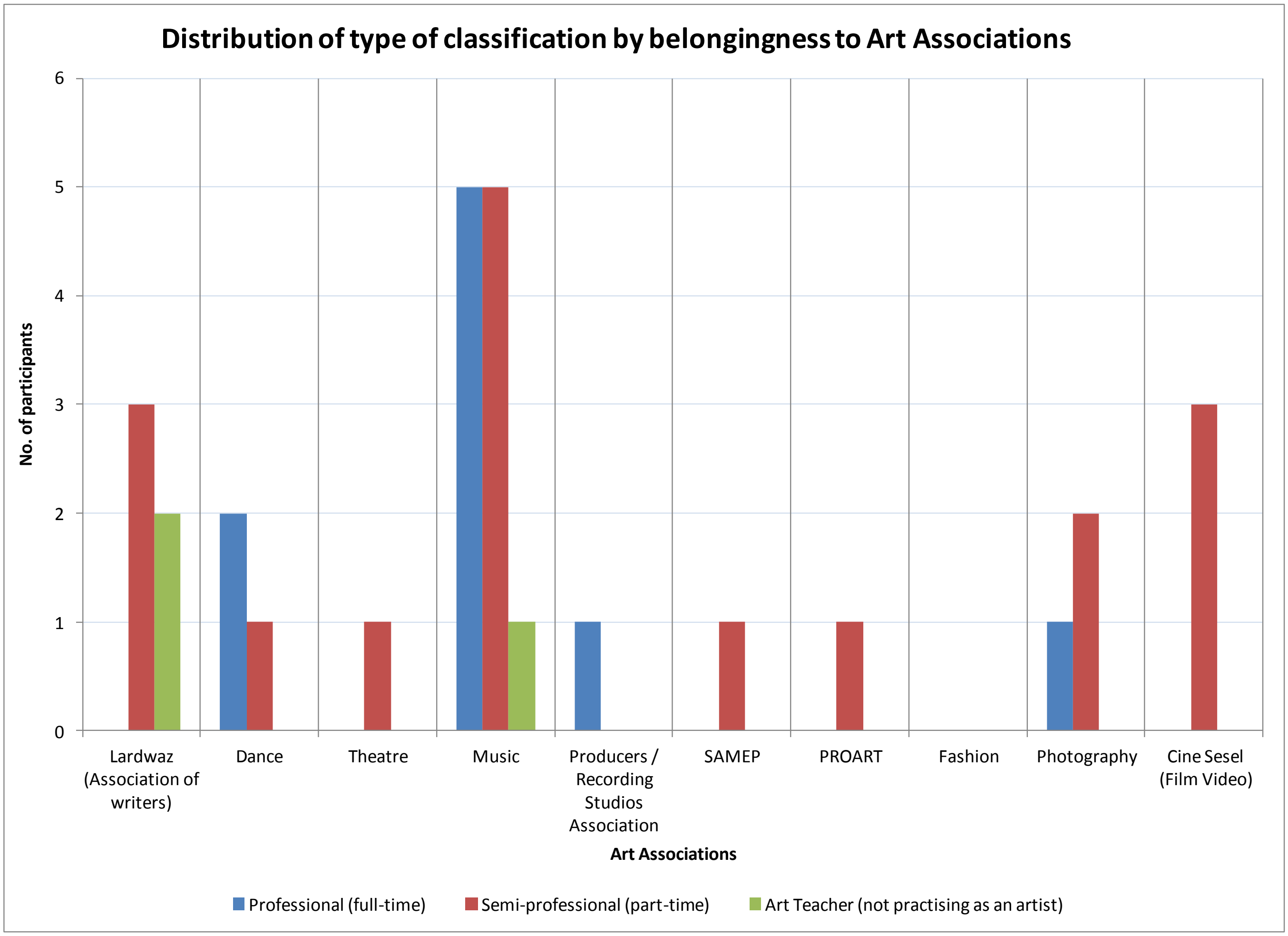
Figure 19 below shows the domains which members of the different arts associations come from. Associations such as Lardwaz, Dance, Theatre, Photography and Cine Sesel encompass a wider range of skills and therefore tend to attract members from a range of domains which may be healthy for an association in terms of capacity to discuss a wide range of related issues, whereas the others that encompass a slimmer range of skills such as Music, Producers, and Fashion, tend to attracts members from very specific domain. It may have positive effect to encourage members from different domains to join one particular art association as this may help practicing artist to better understand the creative industry rather than just their specific domains.

Figure 19: Members of the Arts Associations from different domains



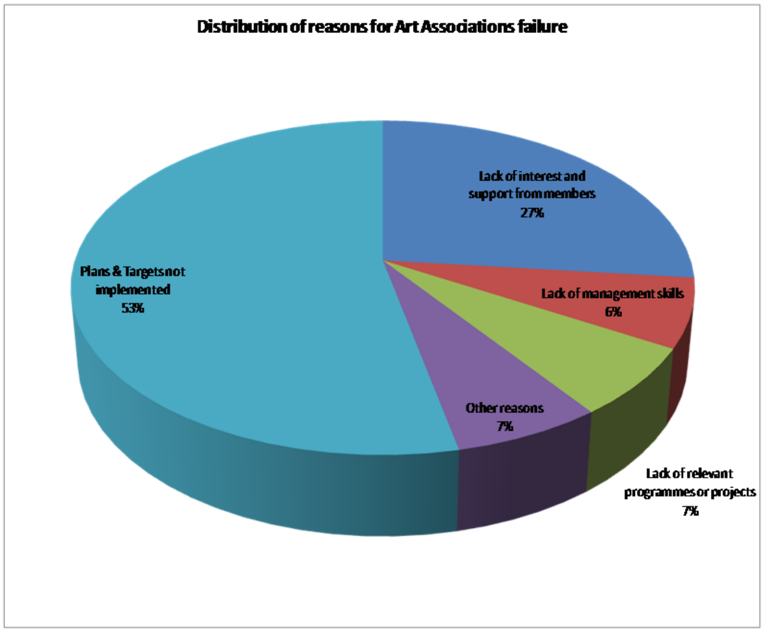
The effectiveness of arts associations also depend on the participation of full-time art practitioners (professionals) as they are the ones who will be better able to bring and implement the ideas discussed at association level to domain level. From **Figure 20** below it seems clear that there is little participation of professionals at association level and as pointed out, they need to be encouraged to participate.

Figure 20: Participation of art practitioners in art associations



As stated above, the arts associations can play a critical role in the future development of the creative industry and therefore it is important that they operate as expected. Currently, 80% of the participants perceived arts associations to be failing on the long term basis and the reasons given are shown in **Figure 21** below.

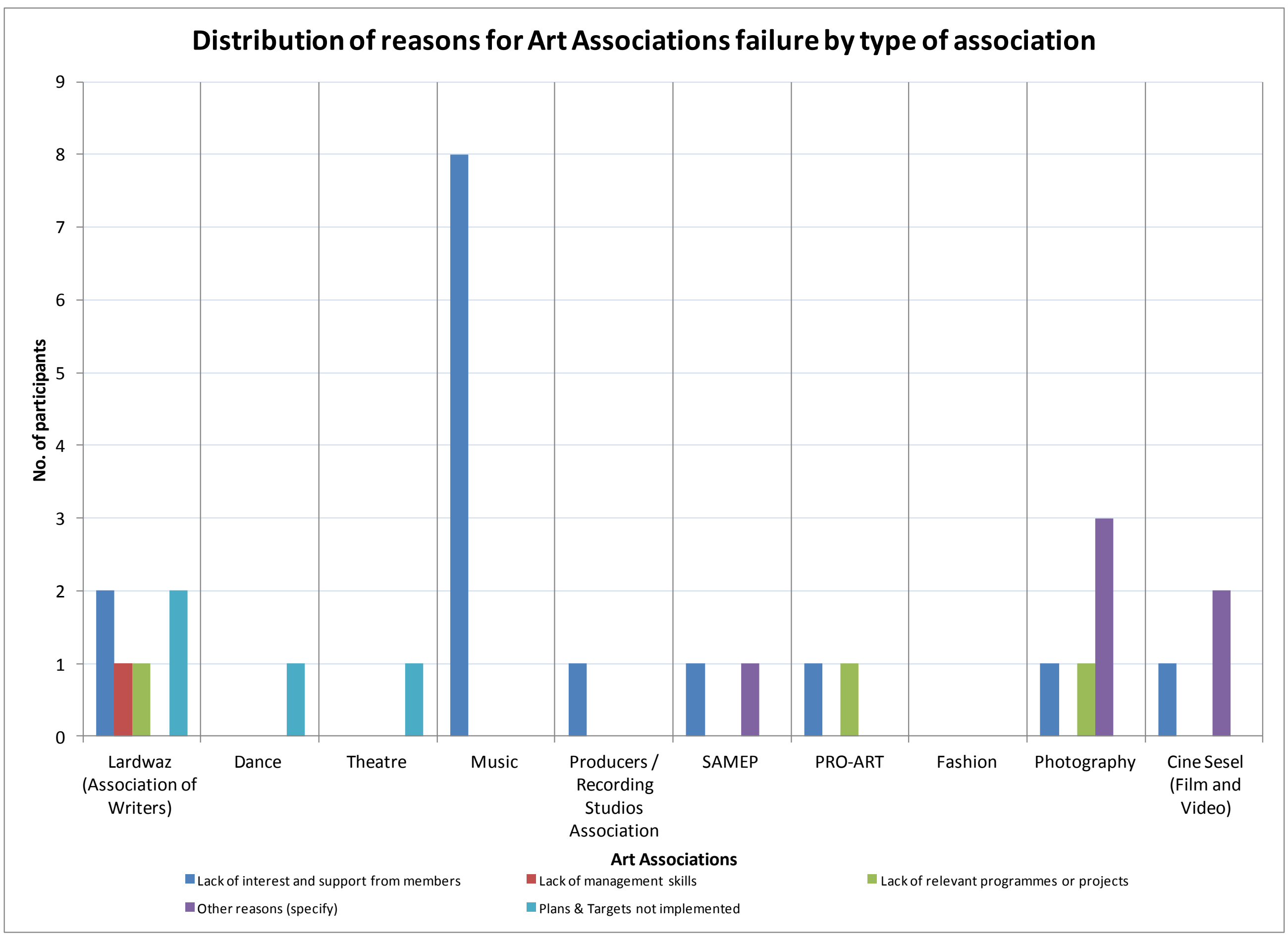
Figure 21: Reasons given for arts associations failure



Failure to implement plans and targets, and lack of interest and support from members were the main reasons given. This was expressed by 80% of the participants.

Lack of management skills and lack of relevant programmes or projects are also reasons that need to be considered though they contribute only 13%. Drilling down to individual art association, failure to implement plans and targets, and lack of interest and support from members are still the main reasons given for operation failure as shown in **figure 22** below.

Figure 22: Reasons for operational failure of individual art association

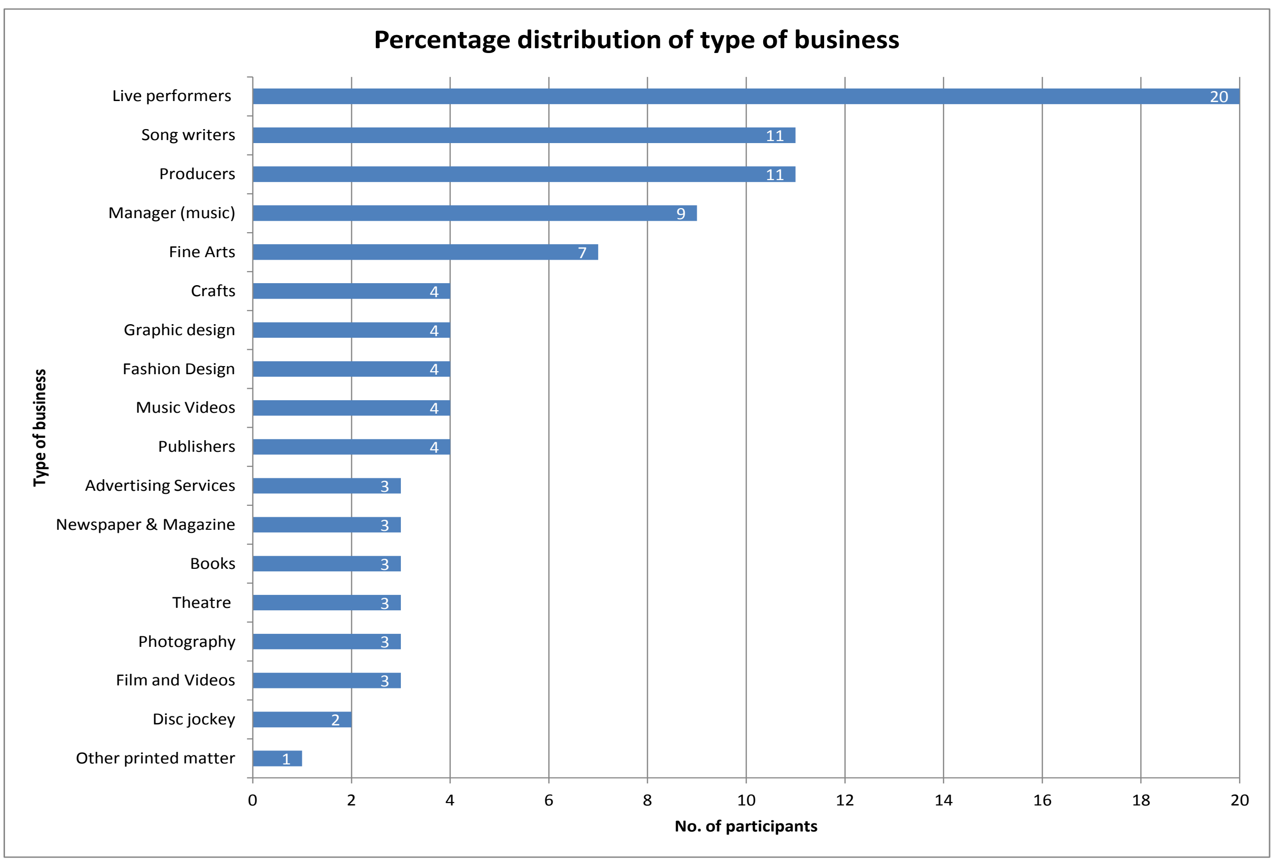


Section 2 - Business Profiles

This section focuses on the business profiles within the creative industry. Fifty-seven percent of the participants confirm that they are operating as a business, either as free-lance artists or under a business name, showing that practicing artists, on the whole, prefer to operate as a business. Concerning gender, from the views of the practitioners, men tend to prefer to operate as a business while for women their views were evenly split. Moreover, the art practitioners who believe in operating as a business were aged 40 year and over. As for the younger ones there was also an even split in their views. A similar scenario may be observed in the classification type where professionals prefer to operate as a business unlike those in the "others" category who were evenly divided in the way they operated.

Figure 23 below shows the type of business within the creative industry that practicing artists are involved in, starting with the highest involvement to the lowest. Businesses such as Live Performers (20%), Song Writers (11%), Producers (11%), Music Managers (9%) and Fine Arts (7%) are the most popular, whereas the others are not as popular.

Figure 23: Participation within each type of business



All the business types are dominated by male involvement except for Advertising Services and Fashion Design, and manned by artists coming mainly from the age group 41-60 are as shown in **Figure 24** and **Figure 25** below respectively.

Figure 24: Distribution of age group by type of business

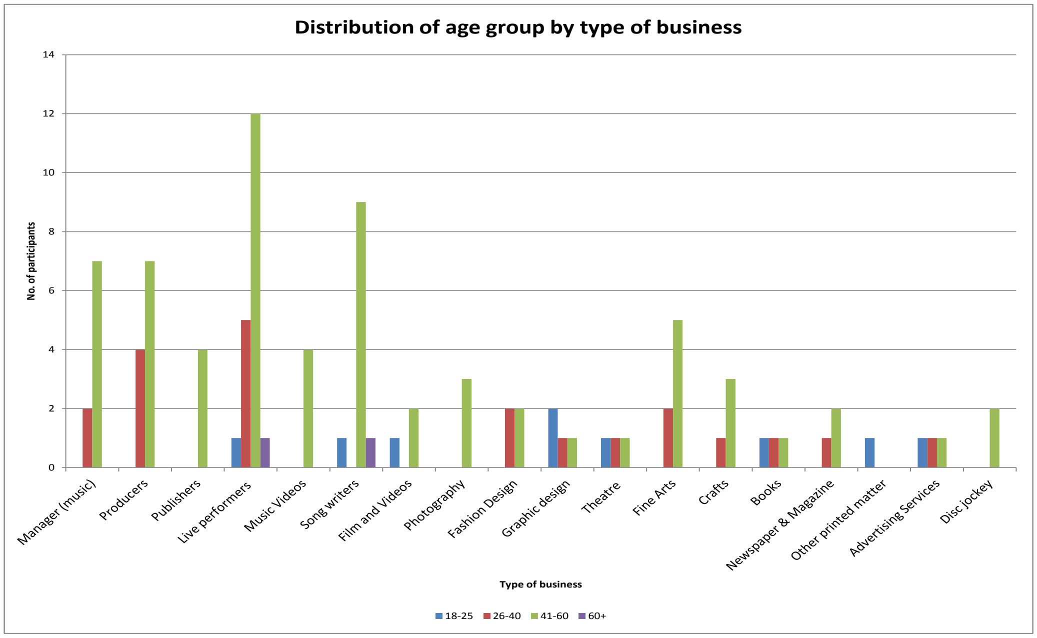
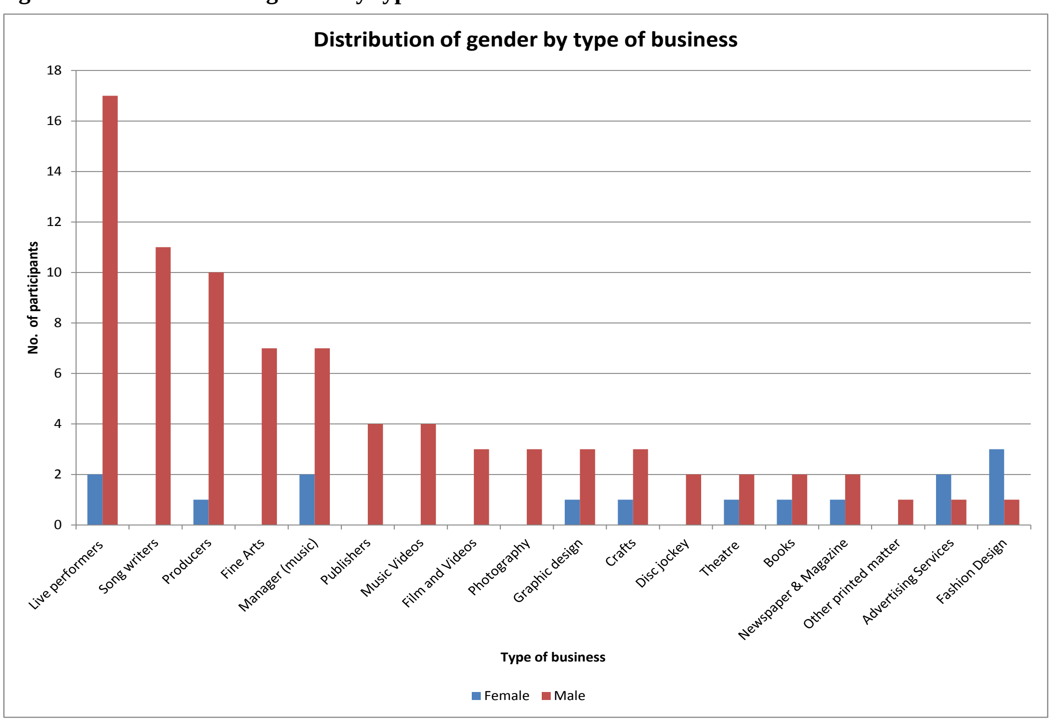


Figure 25: Distribution of gender by type of business



It is interesting to note that most of the business types are being operated mainly by professionals followed by semi-professionals as shown in **Figure 26** below. This is an encouraging scenario as each business type is getting the kind of attention (full-time personnel) to ensure successful operation.

Figure 26: Type of classification by type of business

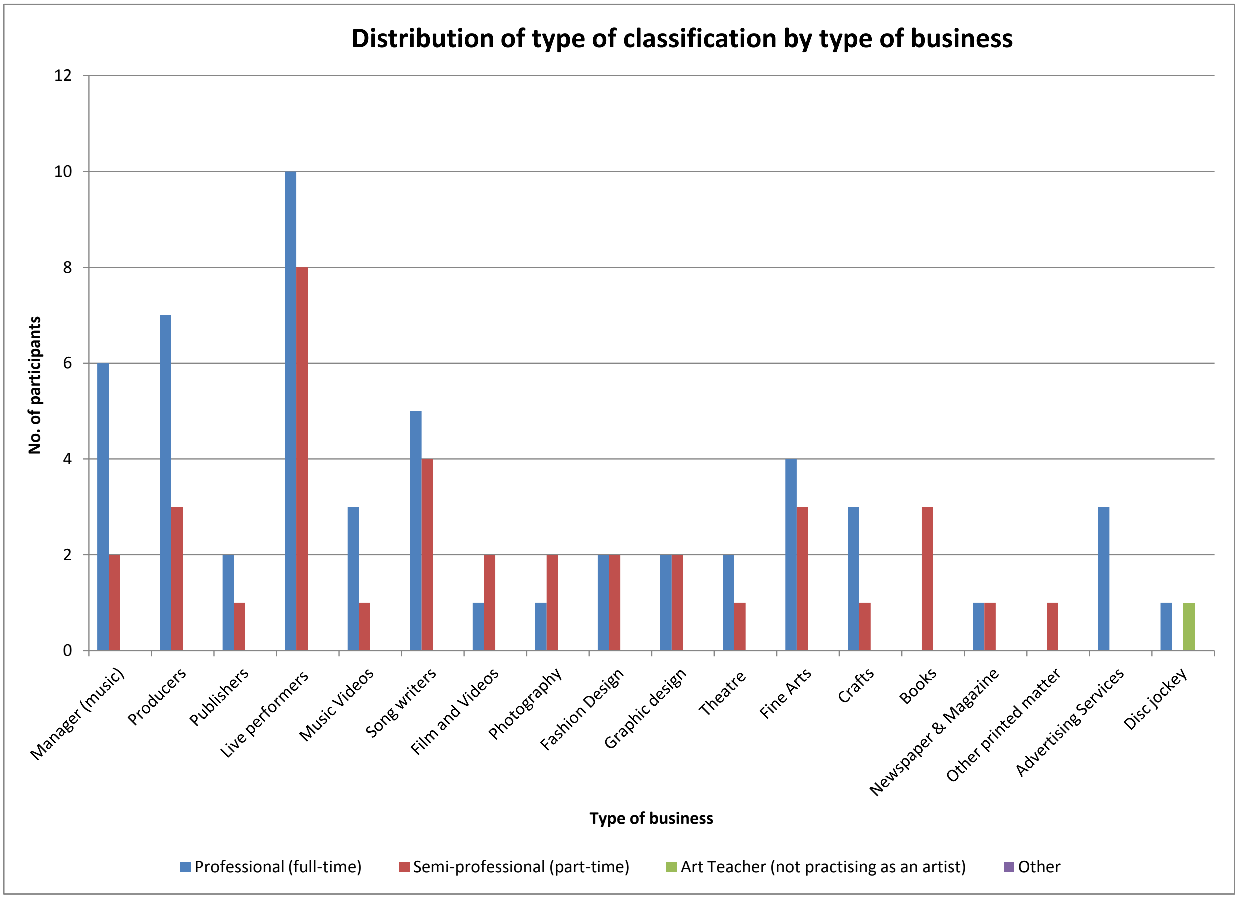
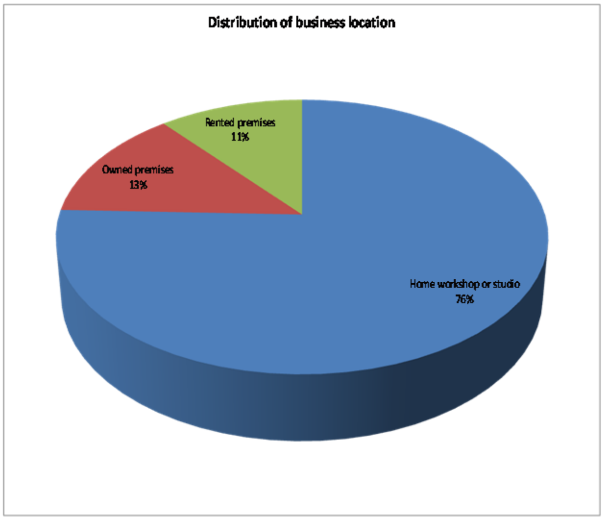


Figure 27: Location of business operations



Most practicing artists operate their businesses at home with 78% specifying that they have a home workshop or studio, followed by owned premises with 13%, and finally rented premises with 11% as shown in **Figure 27** on the left.

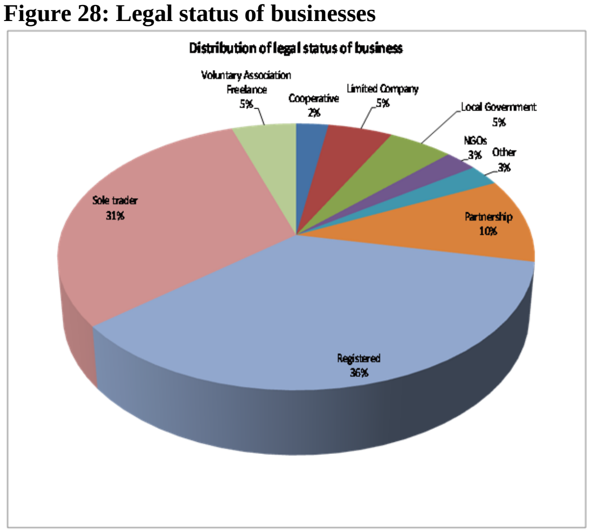
It should be noted that only 54% of business ownership is by Seychellois with 46% by non-Seychellois, with only 16% of owners having employees.

The number of employees ranges from 1 to 9 with an average of 4 employees per business owner which may be interpreted as an average of 2 males and 2 females per business owner as shown in the tables below.

No. of employees	Owners (Female)	Owners (Male)	Total (owners)
1	1	1	2
2	2	2	4
3			0
4			0
5		1	1
6	1		1
7	2	1	3
8			0
9		1	1

	No. of employees	Percentage	Average
Female	25	49%	2
Male	26	51%	2
Total	51		
Average	4		

Figure 28: Legal status of businesses

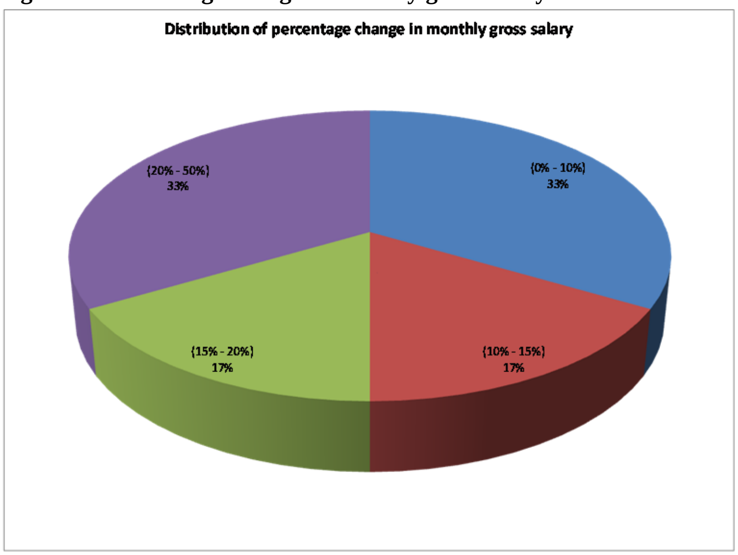


Most of the business owners are operating their businesses mainly under the legal status of registered (36%), sole trader (31%), and partnership (10%) with a very few operating under other legal status such as voluntary associations, limited company, local government, NGOs and so on as shown in **Figure 28** on the left.

Among the business owners, only 25% of them have experienced a change in their number of employees since 2008, showing that the employee status of creative industry has remained stagnant – this may be an indication of insignificant growth in the industry.

The average gross wage of the employees in this industry only falls within 2 wage groups, one being SCR 2,500 - SCR 5,000 comprising 62% of employees and the other being SCR 5,001 - SCR 10,000 comprising 38% of the employees. The average gross wage is fairly distributed among the two genders as shown in the table below with only 32% of participants having had a change in their average gross wages.

Figure 29: Percentage change in monthly gross salary

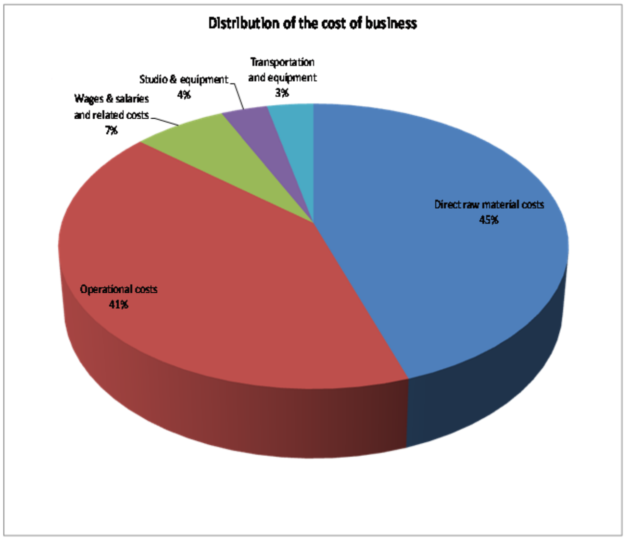


	Female	Male	Total
2,500-5,000	12	15	27
5,001-10,000	13	11	24
Total	25	26	51

For those who have had a change in their average gross wages, the changes have ranged from 1% to 50%. The percentage change in groups 0%-10% and 20%-50% being the most common with 33% each and the rest with only 17% as shown in **Figure 29** on the left.

Cost of running a business within the creative industry is an important factor for further development of the industry. **Figure 30** below shows the different elements that contribute to the main cost of running such business.

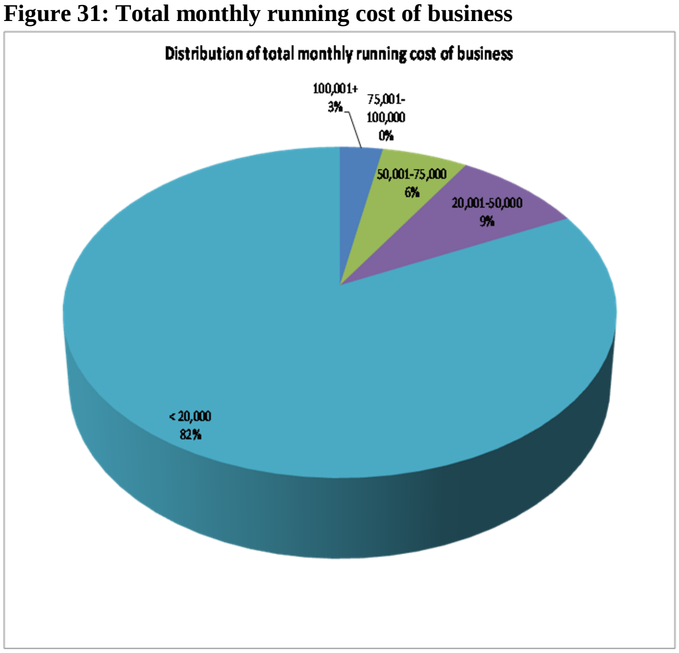
Figure 30: Business running costs



The contribution of each key elements are: access to raw materials at 45%, followed by operational costs at 41%, then wages & salaries at 7%, then studio & equipment at 4%, and finally, transportation at 3%.

Given that access to raw materials and operational costs add up to 86% of the overall business running costs, the appropriate bodies may need to look at strategies to reduce those costs in an effort to making the business more profitable and thus increasing the attractiveness of the industry.

Figure 31: Total monthly running cost of business

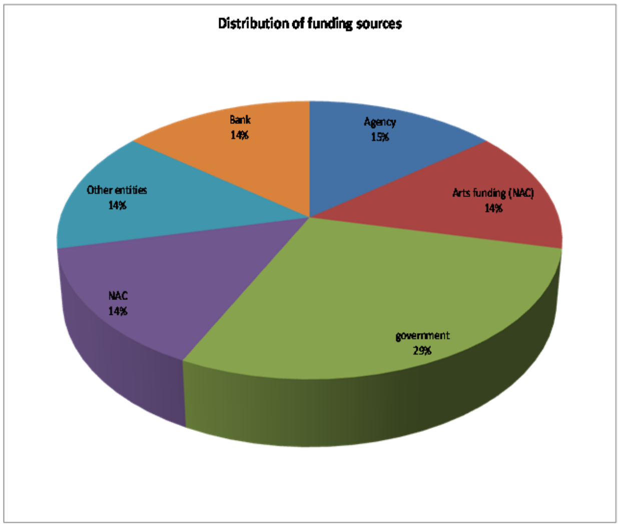


Considering the main elements that contribute towards the business overall running costs within the creative industry, the distribution of the average business overall running costs are presented in **Figure 31** on the left. It can be seen that 82% of costs falls below SCR 20,000, 9% between SCR 20,000 - SCR 50,000, 6% between SCR 50,001 - SCR 75,000, and only 3% going beyond that.

Achieving a cost reduction in the key elements discussed above will also help with the business overall running cost.

Securing funds is the key to the development of any industry. In the creative industry, only 24% of businesses managed to secure funds over the last 2 years. This may be a barrier in industry's development.

Figure 32: Funding sources

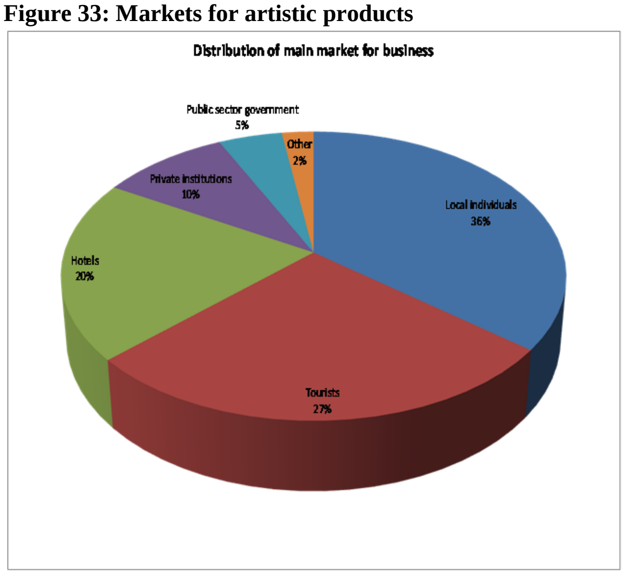


The sources of funds came from a range of bodies led by the Government with 29% and others such as agencies, banks, NACS, Arts Funding and other entities with each contributing approximately 14% as shown in **Figure 32** on the left.

Encouraging appropriate bodies to consider making more funds available with easier access for the creative industry businesses will allow more businesses to secure funds and encourage the growth of the industry.

To encourage further commitments by funding bodies, there needs to be clear markets for the artistic products as this will ensure ability for repayment of any funds borrowed. **Figure 33** below shows the range of markets used by practicing artists together with their frequency of use.

Figure 33: Markets for artistic products

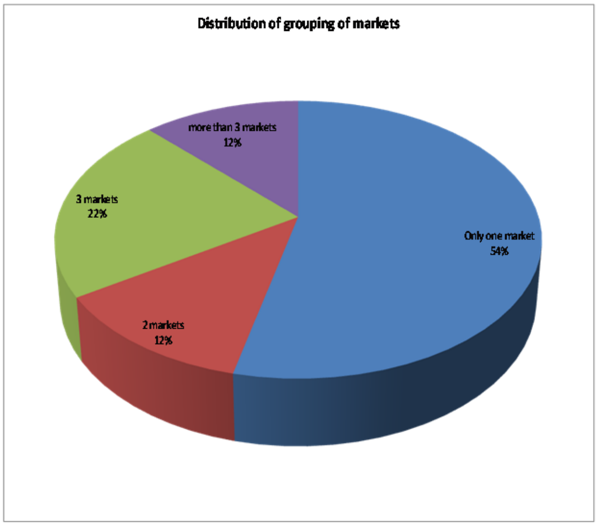


The most common market for the artistic products is selling to local individuals at 36%, followed by selling to the tourists at 27%, then selling to hotels at 20%, then selling to private institutions at 10%, then selling to public sector government at 5% and others at 2%.

With so many hotels being constructed, encouragement to use local artistic products may expand the existing market.

It may be noted that an artistic product may be sold in more than 1market making it easier for a practicing artist to sell his/her products. **Figure 34** below shows the grouping of markets that may be targeted by a particular practicing artist.

Figure 34: Grouping of markets



Though 54% of practicing artists target a single market for their products, there is still 48% targeting more than 1 market. It is encouraging to see that 36% of practicing artists are already targeting 3 or more markets.

Campaigning for a higher percentage of multiple markets for each artistic product will boost the confidence of funding bodies as they will see investment in creative industry as less risky.

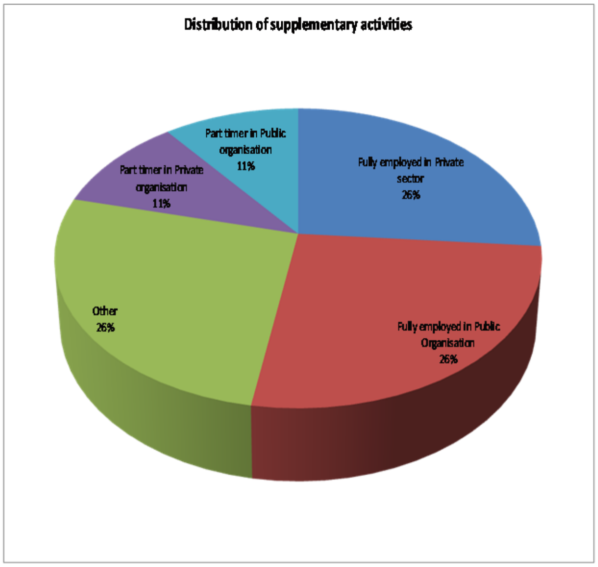
Given that the type of business determines the end products, a similar scenario may be noted when considering targeted markets in relation to type of business. It is dominated by local individuals, followed by tourists, hotels, private institutions, public sector government, and finally by others. The same recommendations for products against markets have to be used.

Type of classification against the type of market shows a slightly different scenario in the sense that professionals (full-time practitioners) are more likely to target the tourists market rather than the local individual markets, but it remains the same for the other type of classifications.

Sustainability of artistic activities refers to whether such activities may be used by the practicing artists to earn their living otherwise they have to source alternative incomes. Sixty percent of practicing artists claims that artistic activities are sustainable whereas 40% claims otherwise. Forty percent is quite significant and it would mean that sustainability and attractiveness of the creative industry may still be a concern, and it has been noted previously that such a situation such will hinder the potential development of the industry.

Those claiming that artistic activities are unsustainable have to engage in supplementary activities to complement their earnings, and in **Figure 35** below an indication of their engagements has been provided.

Figure 35: Supplementary activities



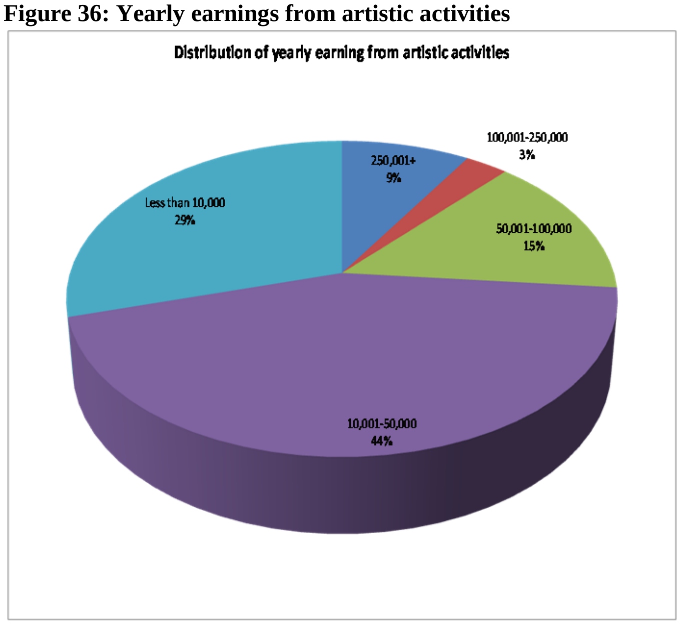
Fifty-two percent of practicing artists have to engage in full-time employment either in the public or private sectors, 22% have to engage in part-time employment, again, either in public or private sectors, and 26% have to engage in other activities.

Such figures show that many of the practicing artists are spending very little time with their artistic activities and they may be having difficulty in keeping up with buyers schedule and this is unlikely to attract potential buyers to commit themselves to purchasing their products.

There is a fairly balanced number of males and females involve in the supplementary activities mostly in the 26-40 and 41-60 age group.

Yearly earnings from artistic activities may range from less than SCR 10,000 to over SCR 250,000, and the distribution is shown in **Figure 36** below.

Figure 36: Yearly earnings from artistic activities

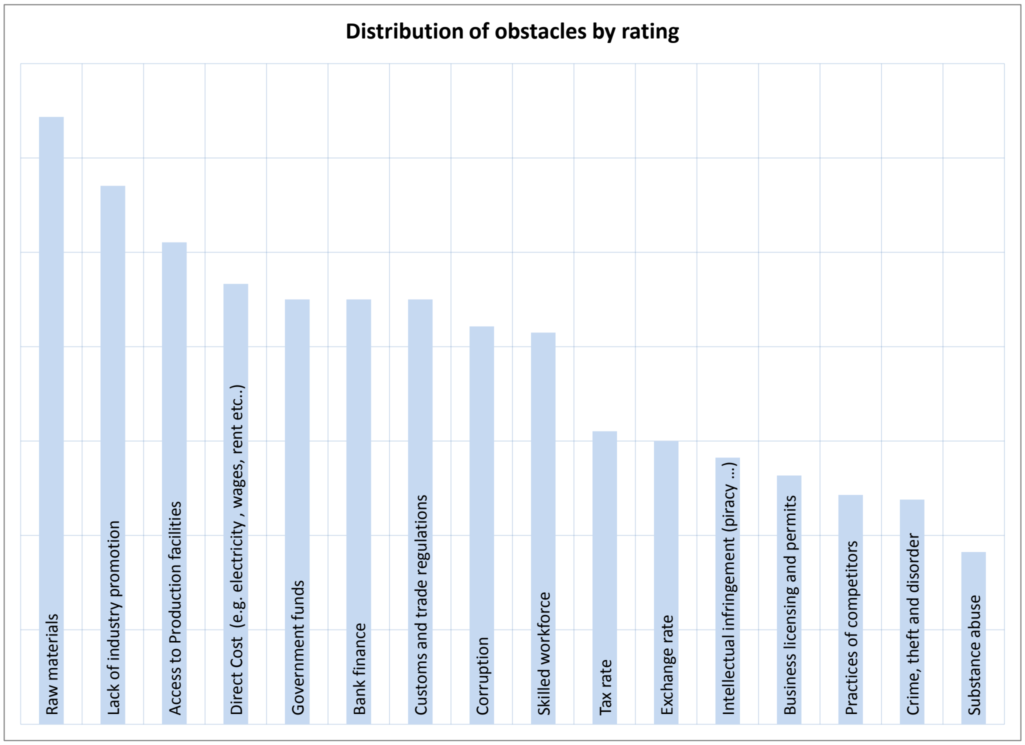


The majority of practicing artists (44%) are generating between SCR 10,000 to SCR 50,000, followed by 29% generating less than SCR 10,000, 15% generating between SCR50, 000 to SCR 100,000, and by less than 10% each for the others.

On average, practicing artists are generating a yearly income of around SCR 53,000 (approximately SCR 4,400 monthly) which is very likely to support the unsustainable claim if it is gross revenue.

A list of obstacles to the operation of creative industry businesses were identified and prioritised from the most common to least common as follows: access to raw materials, lack of industry promotions, access to production facilities, direct costs (utility), Government funds, bank finance, customs & trade regulations, corruption, skilled workforce, tax rate, exchange rate, intellectual infringement, business licensing & permits, practices of competitors, crime & theft & disorder, and finally, substance abuse. The results are shown in **Figure 37** below. I t can be seen that operational costs and funding sources remain top of the priority list which can be revised and adjusted through proper strategising by the relevant bodies.

Figure 37: Obstacles by rating



Remuneration of practicing artists is mainly from commissions, fixed fees, royalties and some other means. It is to be noted that male artists and artists in the 41 to 60 age group are remunerated the most. Remuneration is very much lower for those in the 41-60 age group.

The kind of remuneration generated depends on the type of business and **Figure 38** below shows businesses such as music managers, producers, music videos, song writers, film and video, photography, and advertising services generating their remunerations mainly from royalties, fixed fees and occasionally from other sources such as selling their products.

Businesses such as fashion design, graphic design, fine arts, books, newspaper & magazine, and other printed matter generate their remunerations mainly from other sources, - selling their products to be more precise.

Figure 38: Remuneration generations by businesses

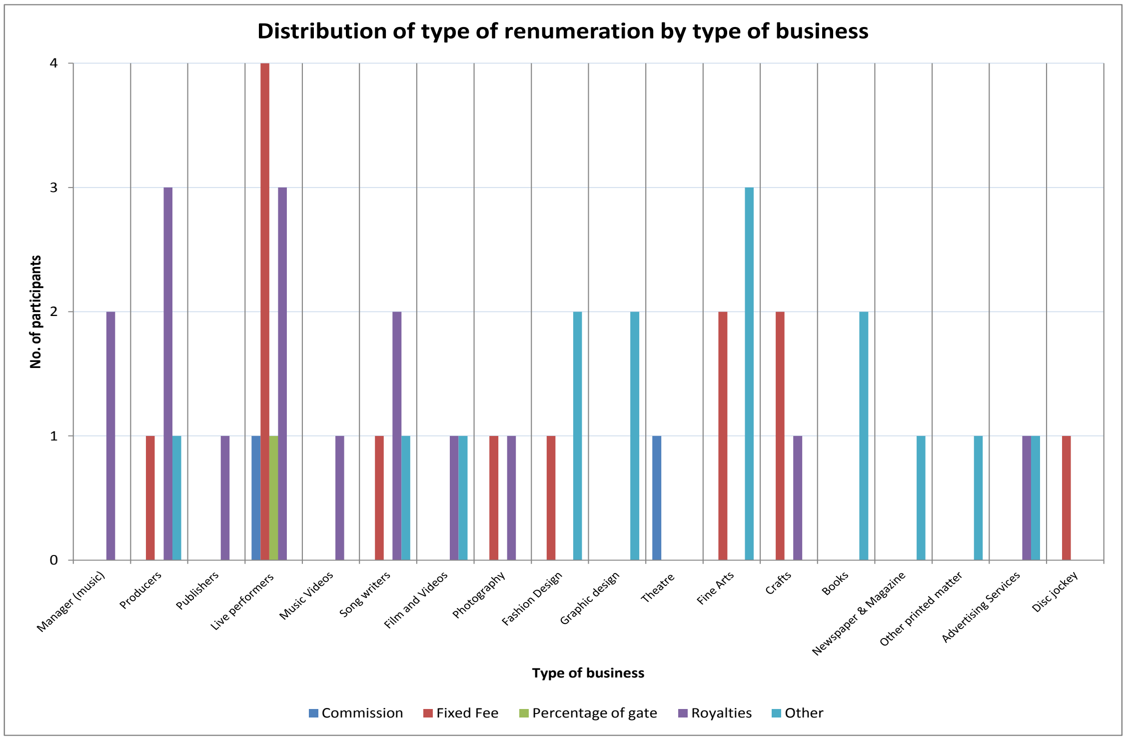
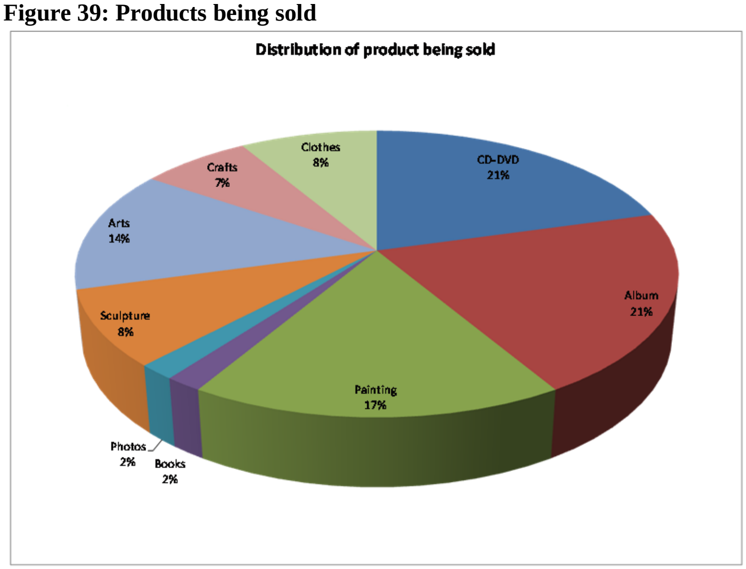
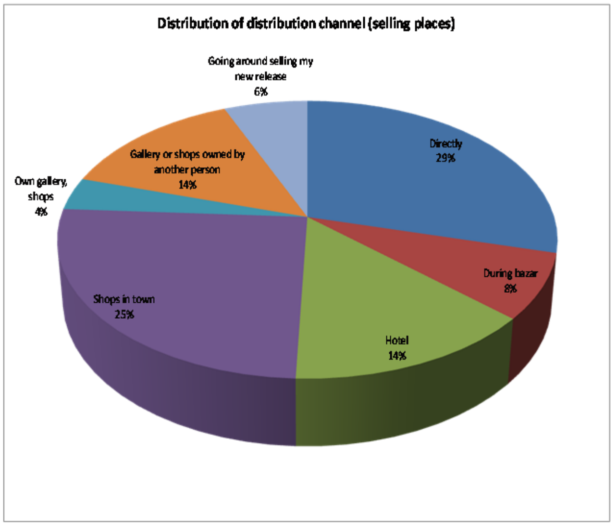


Figure 39: Products being sold



The range of products being sold by art practitioners are shown in **Figure 39** on the left. CD-DVD and album, are the most common ones with 21% each making up 42% of the products being sold. They are followed by painting and arts with 17% and 14 % respectively making up 31% of the products. The rest of the products range from 2% to 8%.

Figure 40: Distribution channels



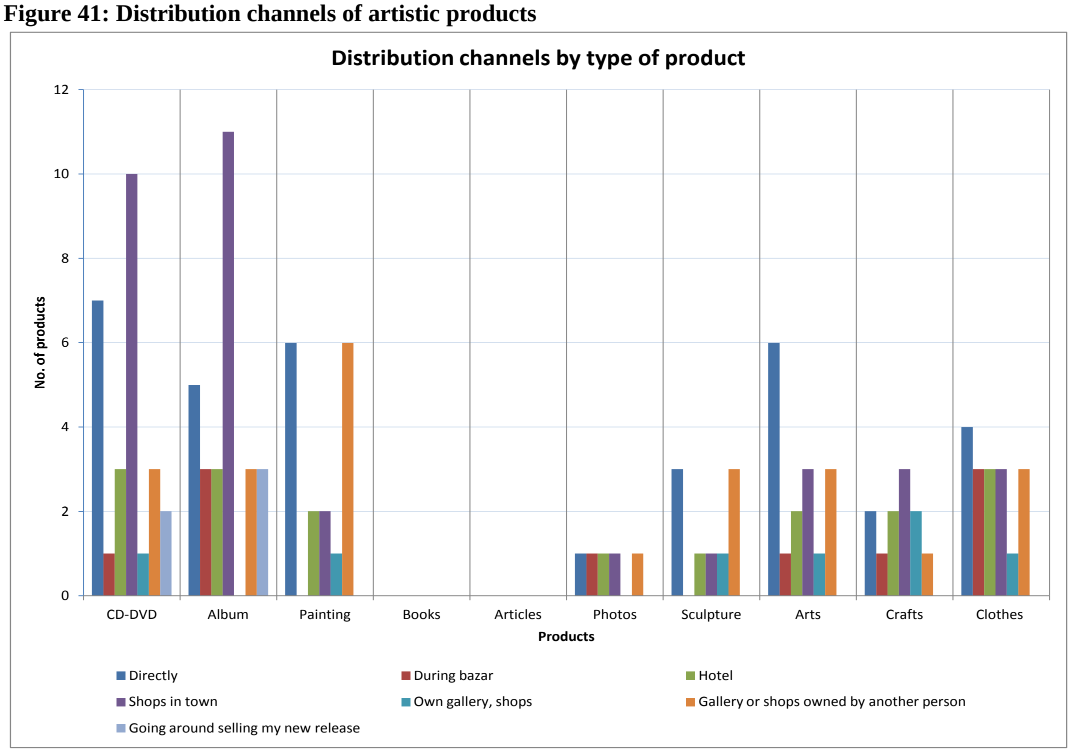
The products above are distributed through the distribution channels shown in **Figure 40** on the left.

Most of the products are sold directly to buyers by the artist (29%), followed by the use of shops in town (25%), then by hotels and gallery or shop owned by another person at 14% each, with a few in bazaar, going around selling, and using own gallery/shop.

Most artist use a single distribution channel (85%), followed by some using 2 to 4 distribution channels (14%), and a very few uses 5 to 10 distribution channels (1%).

Most artistic products allow for multi-distribution channels whereas others do not as shown in **Figure 41** below. Books and articles are the most difficult products to distribute and therefore, such artists will need significant support from relevant bodies to assist with the distributions. The easier the distribution, the more time may be spent on the art itself which may result in more quality and quantity of products.

Figure 41: Distribution channels of artistic products



The same scenario may be observed when considering the type of business against the distribution channels. Most of the type of business lend themselves to multi-distribution except for theatre, books, other printed matter, and disc jockey as shown in **Figure 42** below. Again, the necessary needs to be done to facilitate the distribution of products from the different type of businesses.

Figure 42: Distribution channels for art businesses

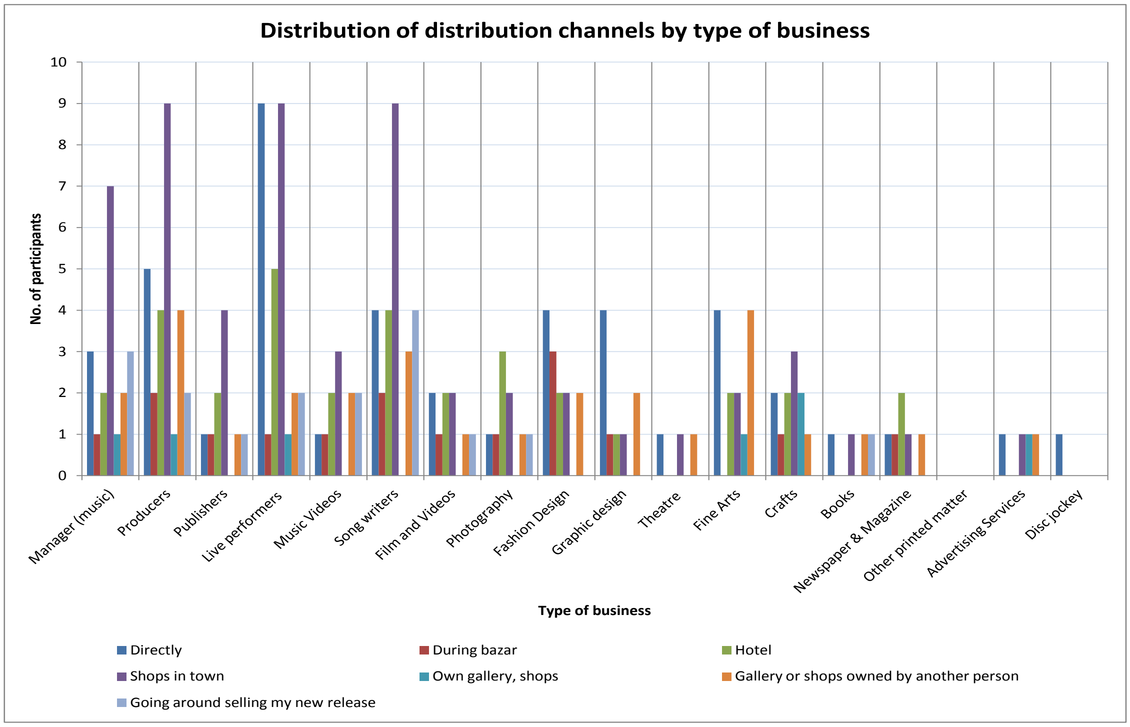
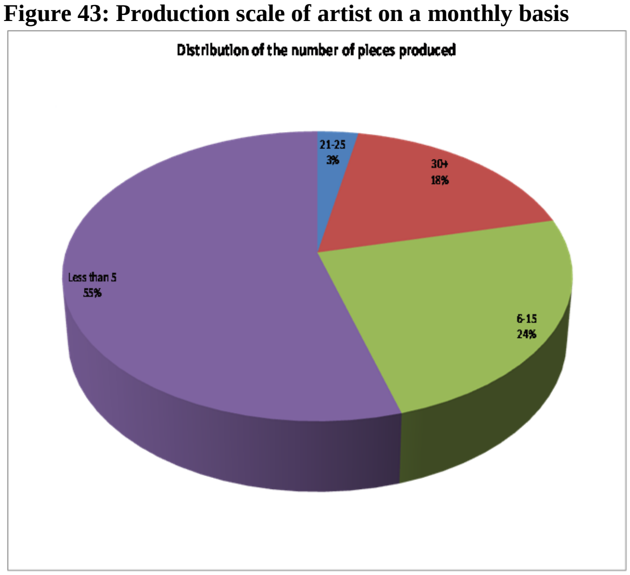


Figure 43: Production scale of artist on a monthly basis



Distribution facilities somehow impact the production scale of artist as every artist would want to see a return on investments for their products.

Figure 43 on the left shows that the production scale ranges from 1 to 30+ with most artist producing less than 5 pieces per month (55%), followed by 6-15 pieces at 24%, then by 30+ pieces at 18%, and very few producing 21-25 pieces per month (3%).To be a viable art market in the eye of potential buyers, the production scale needs to be increased significantly.

The production scale of less than 5 still dominates even when looking at individual product instead of artist except for products such as arts, crafts, and clothes as shown in **Figure 44** below as those can easily be mass produced. On average, approximately 13 pieces of each product is produced on a monthly basis.

Figure 44: Production scale of product on a monthly basis

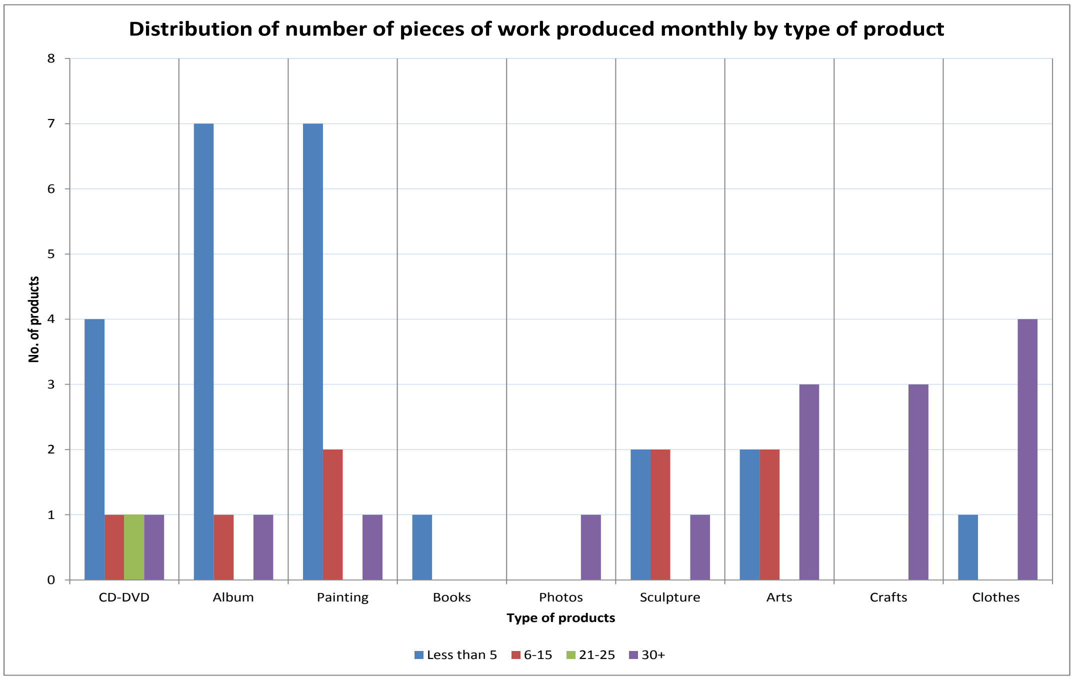
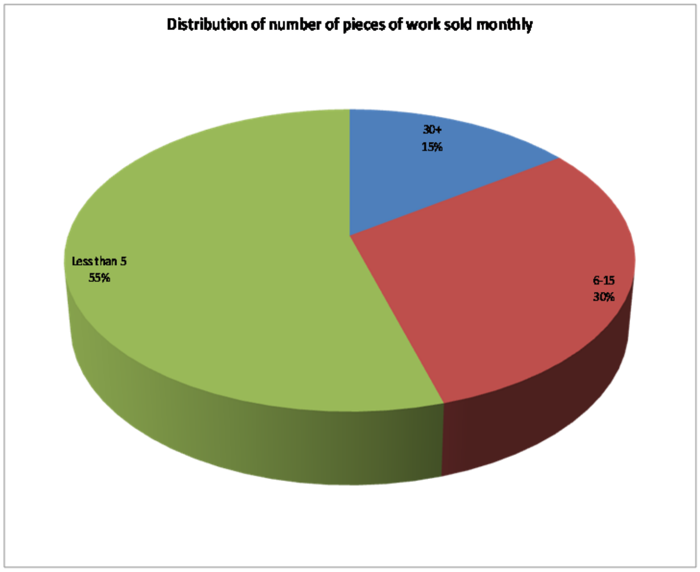


Figure 45: Product sales monthly



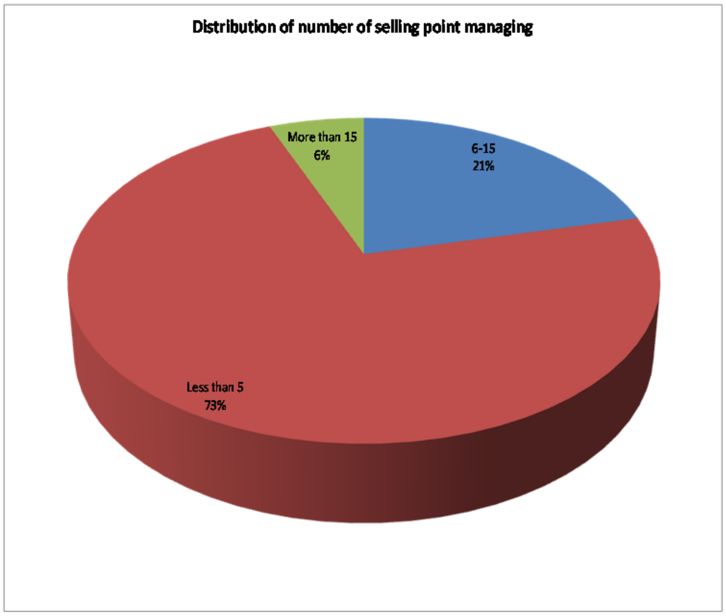
As stated above, the distribution facilities somehow dictates the production scale of artists and individual products. This is well illustrated in **Figure 45** on the left which shows sales figure of pieces sold by artist per month.

55% of the sales fall in the category less than 5, followed by 6-15 with 30%, and then by 30+ with 15%.

On average, 12 pieces of a product are sold monthly, which generally matches the production average of 13 pieces.

The sales figure for individual product is still dominated by the category less than 5 except for photos, crafts, and clothes which fall in the category 30+ pieces.

Figure 46: Managed selling points



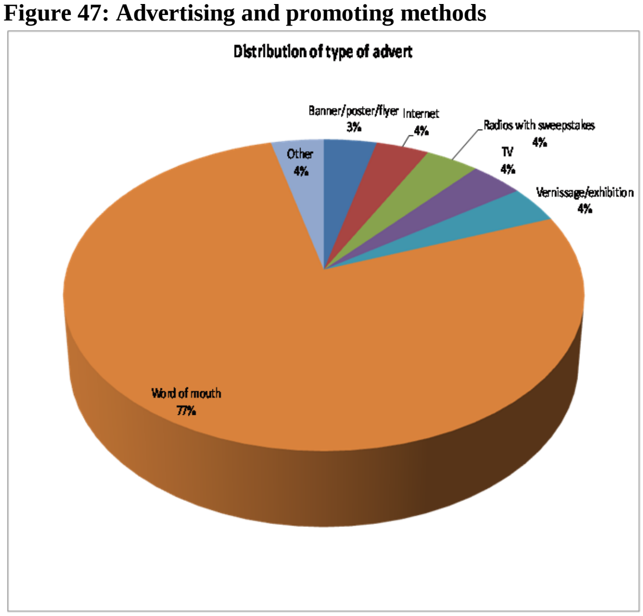
Practicing artists are also involved in managing selling points.

Most practicing artists manage less than 5 selling points (73%), followed by managing 6-15 selling points (21%), and a very few managing more than 15 selling points (6%) as shown in **Figure 46** on the left.

Even managing selling points by product are mainly less than 5 except for crafts and clothes which fall between 6 and 15.

In terms of advertising and promoting their products or services, practicing artists rely mainly on word of mouth with 77% whereas all the other means of advertising and promoting such as banner/poster/flyer, internet, radio, television, and exhibition contribute at most 4% each as shown in **Figure 47** below. It was pointed out earlier that one of the main reasons operations of associations failed was lack of promotion of products and services, and this further confirms the point.

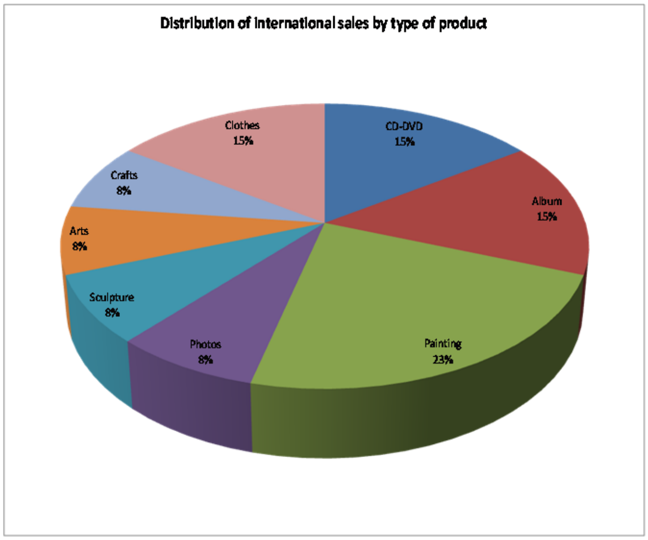
Figure 47: Advertising and promoting methods



It is clear that the aim of advertising and promotion is to get the attention of the mass market and word of mouth will not be the ideal means to do that. The necessary needs to be done to increase the other means especially radio and television.

Even for individual products, word of mouth is being used for every single product. Advertising and promoting products and services may be costly and therefore the associations and other relevant bodies need to review the existing strategies.

Figure 48: International sales by type of product



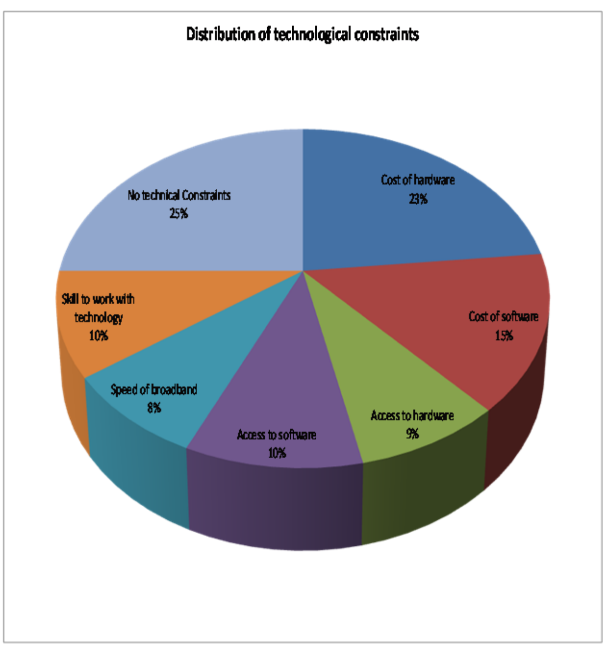
Exporting artistic products may be another fairly lucrative distribution channel besides those being used locally. Sixteen percent of practicing artists are exploring such option through the use of a variety of products as shown in **Figure 48** on the left.

The main product being sold internationally is painting at 23%, followed by clothes, album, and CD-DVD at 15% each, then by crafts, arts, sculpture, and photos at 8% each.

Technological developments are having significant impact on artistic activities and therefore there is a need to bring the practicing artists up to speed with such developments. On the other hand, the new developments come with a cost and this may cause the practising artists to be reluctant to move on with the developments. Such constraints make it difficult for practicing artists to compete on the international markets, the regional markets, and even on the local markets.

Analysis of the impact of technological developments on the artistic activities is shown in **Figure 49** below.

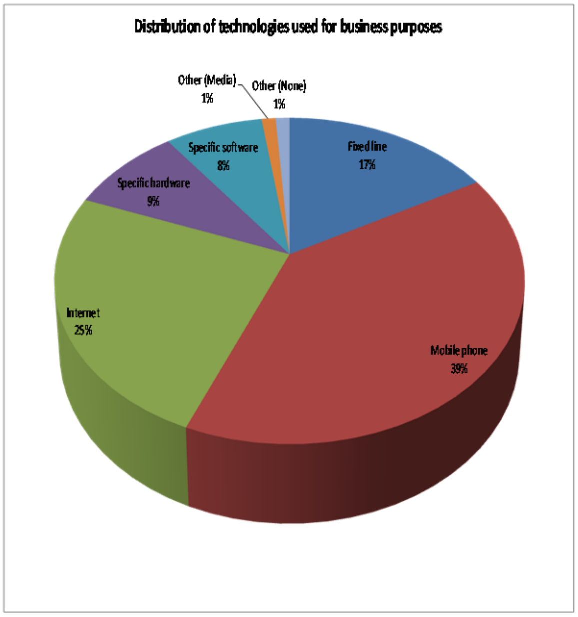
Figure 49: Technological constraints



The cost of hardware and software are identified as the main constraints with 23% and 15% respectively, followed by access to hardware and software, and skill to work with technology with all 3 contributing up to 10% each, then by the speed of internet playing the least role at 8%.

It is encouraging to note though that 25% of practicing artists are claiming that they are not experiencing any technical constraints. This shows that a number of practicing artist are finding their own way of keeping up with technological developments but still, there is the other 75% who needs assistance to keep up.

Figure 50: Technology used for business purposes



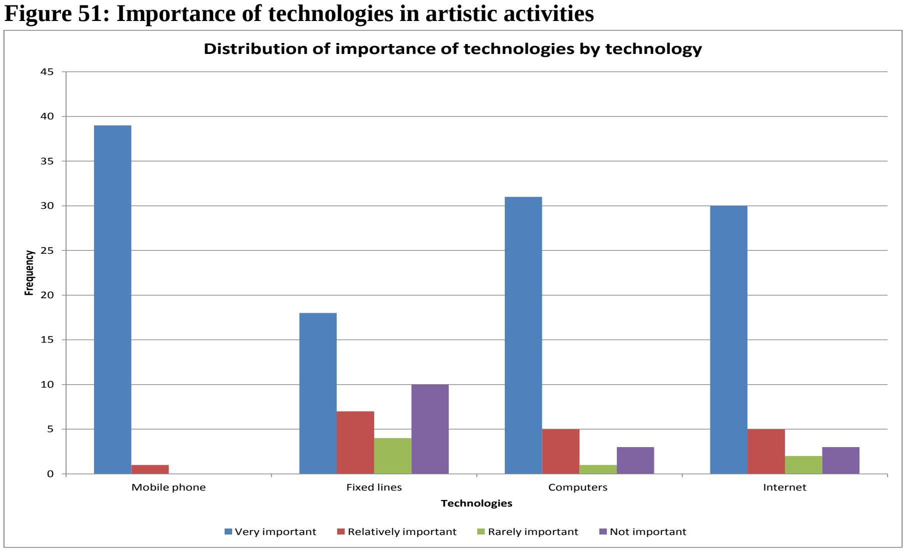
Despite all the technological constraints discussed above, the more commonly used technologies such as mobile phones, internet and fixed lines have well penetrated the arts industry. Eighty-one percent of practicing artists are making use of them with mobile phone leading with 39%, followed by internet with 25%, then by fixed lines with 17%.

The more recently developed technologies such as computer hardware and software are not doing that well with only 9% and 8% respectively.

It is surprising though to see that there is 1% of practicing artists who are not using any of the technologies. All these are shown in **Figure 50** on the left.

It is to be noted that many of the practicing artists would normally use a combination of technologies to practice whatever arts they are involved in. **Figure 51** below shows the importance practicing artists placed on each technology with regards to their artistic activities. It is clear that all the technologies considered are classified as very important by the practicing artists for their artistic activities with a very few saying not important. Particular attention needs to be placed on practicing artists not valuing technologies within their artistic activities in this modern day business environment.

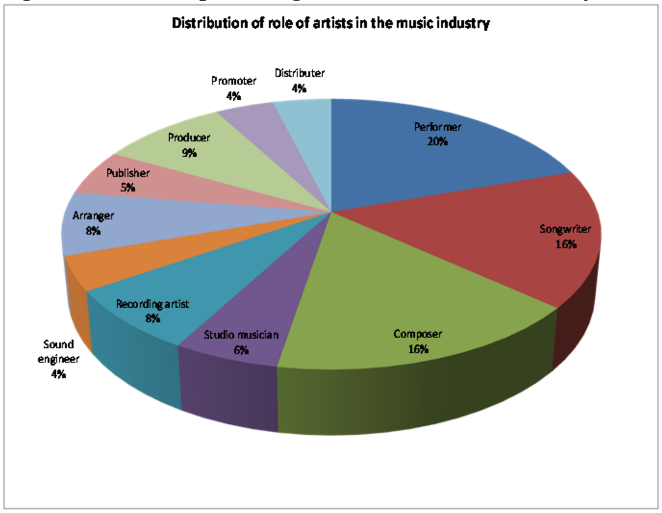
Figure 51: Importance of technologies in artistic activities



Section 3 - Roles of artists within the creative industry

This section focuses on the roles of practicing artists from the different area of the creative industry.

Figure 52: Roles of practicing artists in the music industry



Fifty-two percent of the participants are involved in the music industry and **Figure 52** on the left shows the different roles they perform within the industry, dominated mainly by performer (20%), songwriter and composer with 16% each and the rest contributing up to 9% each.

All the different roles are performed mainly by male artists from the age group of 41-60 years. Again, the issues of gender balance and attractiveness to the youth become a matter of concern.

It is encouraging though to note that the different roles are performed mainly by professionals (full-time) meaning that the necessary time is being allocated for each role except for composer, promoter and distributor which are performed mainly by semi-professionals (part-time) as shown in **Figure 53** below. Many of the participants perform more than 1 role with only 24% performing a single role whereas 42% perform 2 or 3 roles and 34% perform more than 3 roles.

Figure 53: Classification by role of artist in the music industry

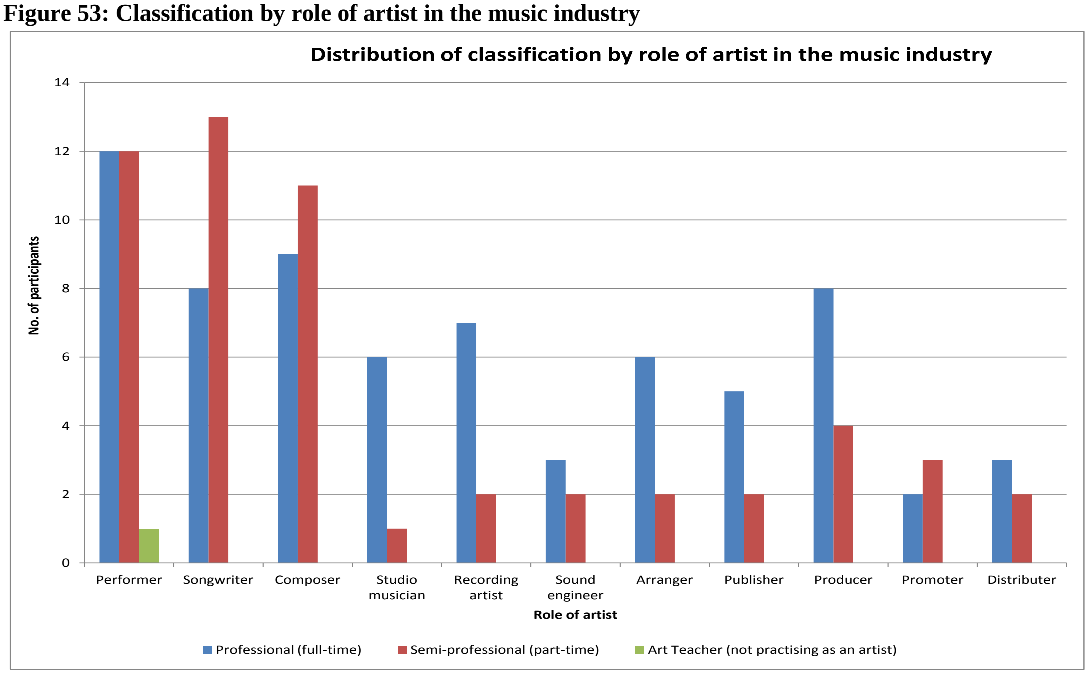
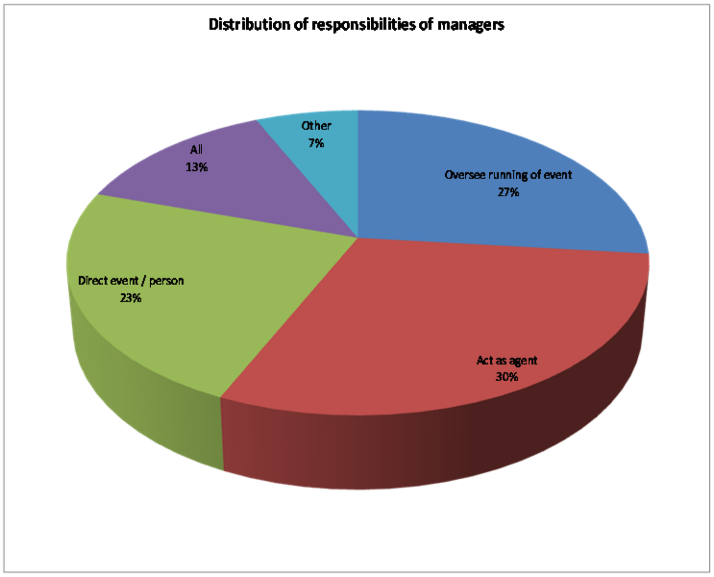


Figure 54: Responsibilities of managers



Eighteen percent of the participants have managerial roles and **Figure 54** on the left shows the different roles they perform as managers, mostly by being an agent (30%), then followed by overseeing running of event with 27%, then by directing event with 23% and 13% assuming all the roles.

Fifty-seven percent perform for independent contractors, 29% for stars, and 14% for personal pleasure. Payment for their services is normally made by regular pay cheque.

Figure 55: Expenses associated with responsibilities of managers

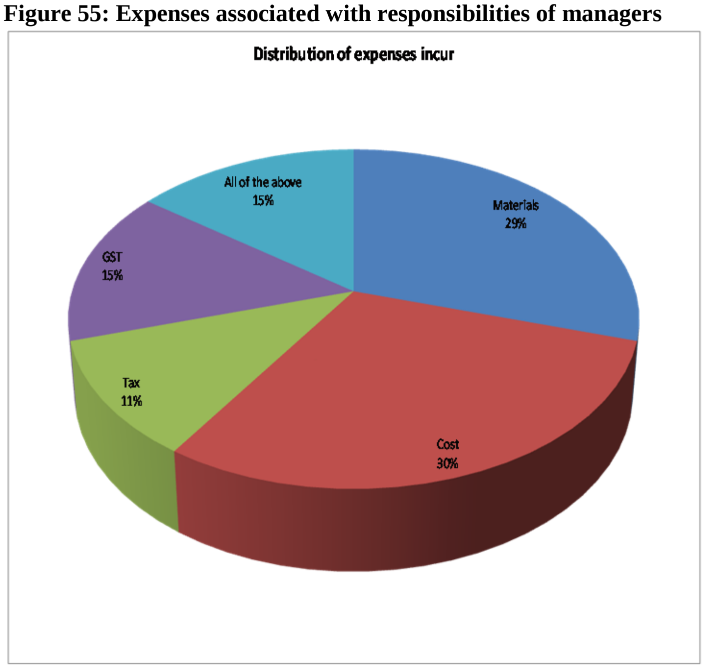


Figure 55 on the left shows the expenses incur while mangers are discharging their responsibilities. Thirty percent and 29% of managers respectively claim that general cost and materials required to organise and manage contributes the highest, followed by GST and a combination of cost and materials with 15% each, and then tax with 11%.

Only 8% of the managers claim that they are reimbursed for the cost incur while discharging their responsibilities, and as expected, this is not a motivating factor for practicing artists to assume managerial roles.

Fifteen percent of the participants have producing roles with 45% of them having their own studios, engineers and arrangers. Of the 55% who do not own their own studio, engineers and arrangers, 38% of them make use of free-lance members. The payment agreement with the free-lancer members is mainly per song (56%), followed by per recording session (33%) and then by other means (11%).

Twenty-seven percent of the producers are also involved in talent scout activities, 27% are also involved in label deals and 44% are also involved in pressing and distribution deals (profit participation deals). Only 29% of producers receive higher percentage from major artists showing that well established artists tend to reap maximum benefit from their work. For independent producers who are not associated with a record company, 29% of them either use a stated recording fund provided by the record companies or use a predetermined budget, with 17% giving a producer guarantee to pay excess cost over recording fund. Eighty-eight percent of them handle the demo production costs whereas the for the other 12% these are handled by the artists themselves.

In cases where there are excess funds after the production is completed, the excess funds are equally split between the independent producer, the studio and the artist. When it comes to controlling music publishing rights on the original recording, only 8% of the independent producers have such agreement.

Figure 56: Distribution of arrangement when producing or recording

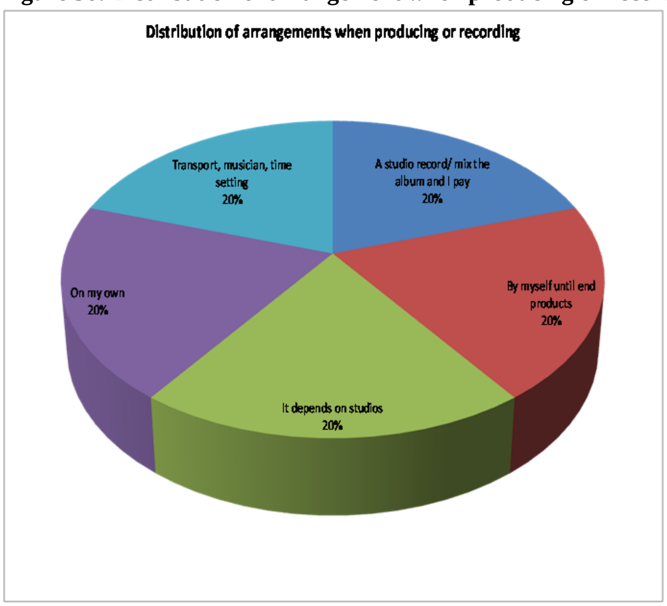


Figure 56 on the left shows the kind of arrangements the independent producers make with the recording company during producing or recording. The kinds of arrangements are equally split and are based on the studios' requirements, the producers requirements, a studio recording and mixing while the producer pay, and the transport, musician and time setting. The record companies are paid mainly by product (38%), followed by a flat fee (37%), and then by a commission rate (25%).

In instances where musicians and/or performers are hired, most often they are paid a flat rate (57%), sometimes per day (29%) or per hour (14%). For such instances, the hired musicians and/or performers are mostly treated as independent contractors (88%) with only 12% of the time treated as employees.

Among the independent producers who are paid a salary during those arrangements of hiring musicians and/or performers, 17% of them act as an agent and during that role, they would again mostly treat the hired musicians and/or performers as independent contractors (83%) and occasionally as employees (17%).

Twenty-eight percent of the participants have the role of writing songs with 64% of them assuming other related roles. The other related roles are shown below together with the kind of participation of the artists.

Figure 57: Other roles of music writers

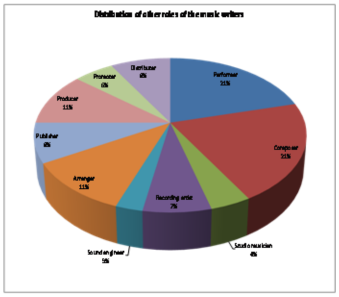


Figure 57 on the left shows the other roles that music writers have to assume.

Most of them also assume the role of composer and performer (21% in each role), followed by the role of producer and arranger (with 11% in each role), and very few assume the role of distributor, publisher, recording artist, promoter, studio musician and sound engineer (the figure ranges from 3% to 8% in each role).

Eighty-eight percent of the music writers go on to participate in musicians activities

Figure 58: Number of songs written by music writers

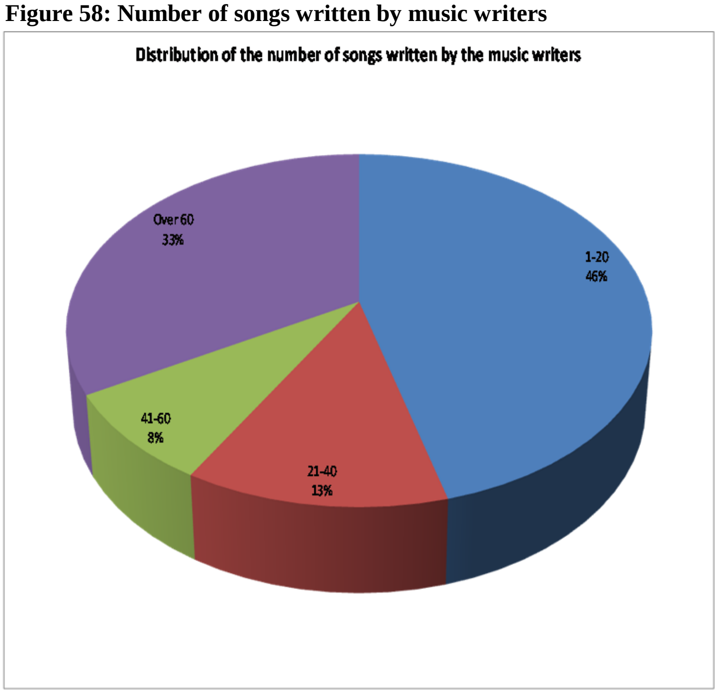


Figure 58 on the left shows the number of songs written by music writers. Most of them (46%) have written between 1 to 20 songs, followed by 33% of them having written over 60 songs, then by 13% of them with between 21 to 40 songs, and 8% of them with between 41 to 60 songs.

There is a well experienced group in the music writing area, writing songs, and this explains why the music industry tends to be leading industry within the creative industry.

Figure 59: Type of music written by music writers

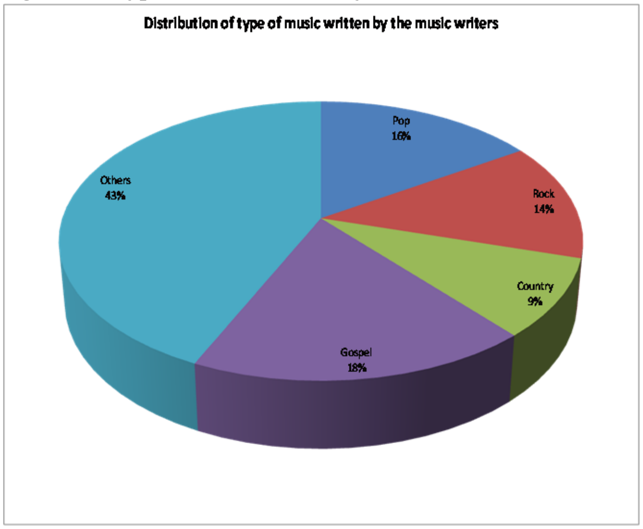


Figure 59 on the right shows the type of music written by music writers. Most of the music writers (43%) are writing other type of music besides those on the general list such gospel, pop, rock and country.

Currently, the new generations of singers are adopting their own type of music explaining the shift from the usual list. Still gospel is contributing 18%, pop contributing 16%, rock contributing 14%, and country contributing 9%.

The majority of music writers (55%) tend to focus on a single type of music whereas the other 45% tend to focus on 2 or more type of music.

Seventy-nine percent of the music writers also perform, 88% also write lyrics and compose music, 65% also publish their own work with 9% having contracts with their publishers, 26% also publish their work in foreign countries where 33% of that is done through the registration with any foreign publishers and 67% through the registration with local publishers. The collection of foreign receipts is mainly done through SACS (83%) and occasionally (17%) through other agents.

Sixty-one percent of the music writers have agreement with performing rights society which is very encouraging as they value the intellectual property rights concept. Their songs are registered mainly with SACS and some music writers (14%) have extended their membership to collecting society in the African Region where 12% of those are receiving mechanical royalties. The 20% of the music writers who are receiving mechanical royalties consider this to be self-employed income.

Education on compulsory licenses for the music writers is a must as only 35% of them are aware of any compulsory licenses but they are at least very familiar with the copyright concept as 95% of them own the copyright on their songs. A very few music writers (10%) decide to sell the copyright of their songs and 18% of them decide to assign rights in their songs where 36% of those who decided to assign rights in their songs are compensated for it.

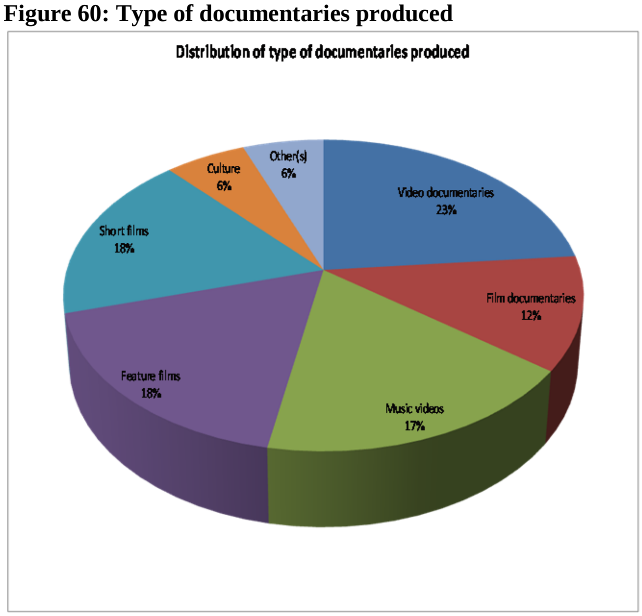
Forty-four percent of music writers work with arrangers where 65% of them make their own demo of songs and 35% of them, their demo of songs are made by recording studios. There is an equal split of music writers who have a home office and those who do not. Thirty percent of them have been involved in making commercial jingles and 11% of them are involved in litigation.

Twenty-five percent of the participants have the role of live performer where their performances are scheduled through hotels (40%) and through private deals (15%) but very often (45%), they use other means such as scheduling their own performances (53%). While performing live, a few performers (38%) charge a fixed rate for their performance while 62% of them will use other charging methods.

Very few participants (5%) assume the role of music video producer. Most of the time (67%), a video will be produced with each recording and most often (67%), there is no agreement between the music video producers and the companies they are working with, for exclusive rights to their video. It appears that only 33% of them pay attention to the rights concepts and therefore, education may become useful for such art area. For those who choose the option of pursuing exclusive rights to their videos, equally shares the view that duration should either be 1-5 years or 6-10 years.

Generally, the music video producers have no rights from any artist and when it comes to financing and producing video, the responsibility is assume either by the music video producer or the agent who will also assume the copyright to those music videos. More often, music videos are not considered as work made for hire, with no licensing agreement with music video library agencies, as they are produced primarily for promotion. The music video producers would normally be responsible for their distribution and would treat any hired performers and technicians identified through the word of mouth as independent contractors. Besides, the music video producers have to absorb any travelling expenses incurred during the production of music videos.

Figure 60: Type of documentaries produced



Also very participants (8%) assume the role of film and video producer.

Figure 60 on the left shows the type of documentaries produced by the film and video producers. Most of the film and video producers (23%) produce video documentaries, followed by short and feature film (18%), music videos (17%), film documentaries(12%), and finally culture and others (6%).

Very often, film and video producers would be involved in more than 1 type of documentaries when drama tends to be the most common ones.

Publisher is another role that has very few participants (6%) with 20% of them also performing the promoter's role. Thirty-three percent of the publishers have had songs published in foreign countries and their royalties are mainly collected through an agent (75%) and the rest through other organised institutions (25%), and a few of those publishers have sub-publishers (17%).

The majority of the publishers belong to a society (67%) and 83% of them own copyright which usually occurs without much negotiation. The amount paid to songwriters is either determined by the agent or a deal is worked out. The publishers would normally be responsible for making demo of songs, make master recordings by using/hiring free-lancers, and produce the songs, but do not make payment to musician pension fund.

Most of the time, publishers work with arrangers but when it comes to working with musicians, half of them prefer to work only with society musicians whereas the other half are as happy to work with non-society musicians.

Literature is also an art field which has not managed to attract that many practitioners. Only 12% of the participants are actually involved in the literature field.

Figure 61: Type of writing

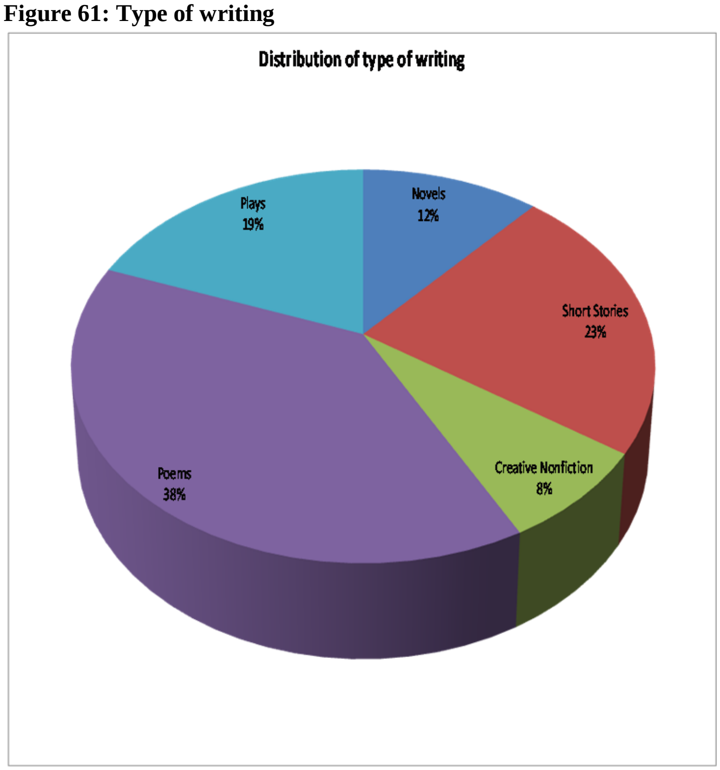


Figure 61 on the left shows the type of writing done by the artist in the literature field. Most of them focus on poems (23%), followed by short stories (23%), then by plays (19%), then by novels (12%), and then by creative non-fiction (8%).

The number of participants in the literature field involved in a single type of writing and those involved with more than 1 type of writing are equally split. Those involved with more than 1 type of writing are commonly involved with up to 5 types with a very few getting involve in more than 5.

Figure 62 and **63** below show the target audience and the means of publications of the literature work. Most of the literatures target children (46%), followed by adults of both genders (36%), then by adolescents (18%). The most common publication channels used are The Kreol Institute, National Arts Council, and self-published with 33%, followed by others with 10%.

Figure 62: Target audience

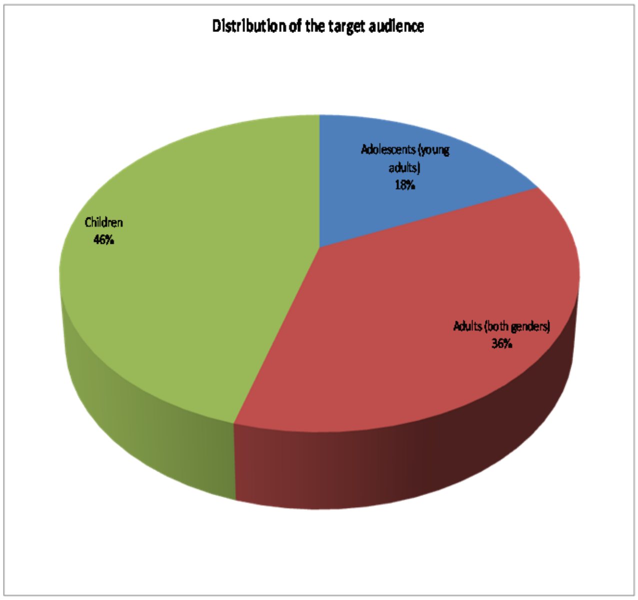
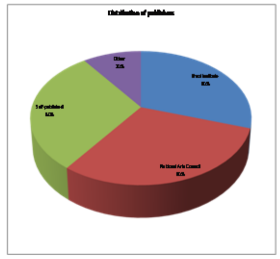


Figure 63: Means of publications



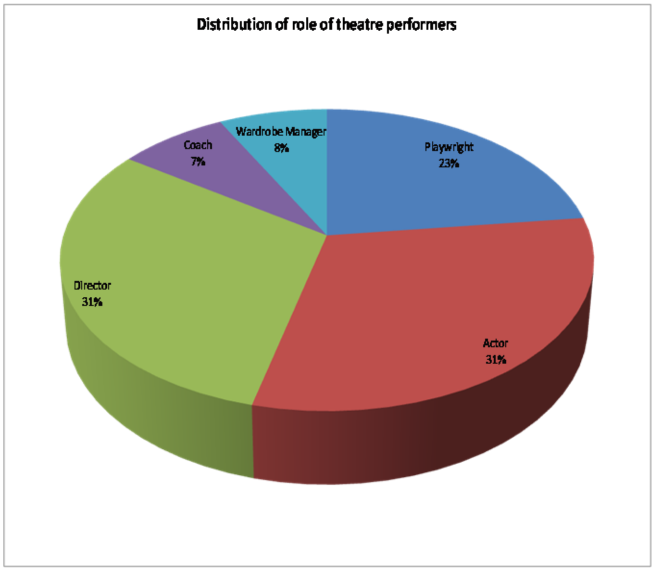
Many participants (70%) claim that they have books written but are yet to be published with most having 1 or 2 books and very few with about 10 books. The majority of the books written (63%), are registered for copyright at the Cultural Property and Copyright Office in the Culture Department with 38% of the writers selling their copyrights to book publishers. Forty-four percent of written books are registered at the ISBN and ISSN agency office at the National Library which is quite significant but it should be encouraged that all books written go through that registration process.

The need for education keeps popping up every now and then. It is again the case when it comes to knowledge of copyright where no artist is well informed. Twenty-seven percent of the artists have no knowledge and 73% of artists are fairly well informed. A similar scenario may be observed when it comes to knowledge of publishing industry. Sixty percent of artists have no knowledge of publishing industry, 30% are fairly well informed, with only 10% as very well informed. As a result, only 30% of artists in the literature field have ever signed a contract with a book publisher, yet 200 copies and in some cases, 400 copies of their books have been sold with only 13% of them earning royalties from the sale.

Very few dancers participated in this exercise but from what can be gathered, modern dance is the type of dancing being practiced, and the dancers do not necessarily belong to a dance group consequently rehearsing at home.

The same scenario could be observed when it comes to theatre performer with only 4% of participants. Most of them would normally assume several roles in theatre performance as shown in **figure 64** below.

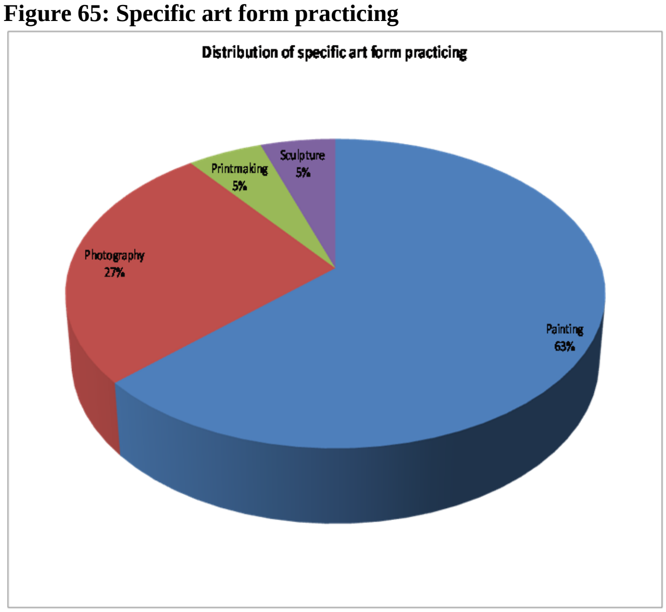
Figure 64: Roles of theatre performers



In most instances, they assume the role of actor and director with 31% each, followed by playwright with 23%, then by wardrobe manager and coach with 8% and 7% respectively.

The plays they focus on most is drama and comedy as there are demand for those. Not much attention is placed on tragedy even though there are demands for it. On average, 1 to 2 plays are written per year, with only 1 being produced and directed per year.

Figure 65: Specific art form practicing



Visual Artists tend to be more popular with 28% of the participants. The most popular art form being practiced is painting with 63%, followed by photography with 27%, then by print making and sculpture with 5% each as shown in **figure 65** on the left.

Most visual artists do not manage to put up any exhibition in one year. Only 20% of visual artists manage to put up 1-3 exhibitions per year and a very few (8%) manage 4-8 exhibitions per year.

Only a few fashion designers participated in the exercise. They would normally shop for fabrics once or twice per week, targeting fabrics for ladies wear which appears to be in more demand. The fashion designers believe that fashion ads influence their fashion style and their new designs can last for more than 3 years with casual clothes, dresses and skirts being on top of their list.

Heritage and research has also attracted very few practitioners with only 6% of the participants. In this field, there are 4 categories. The first category is **Tangible Heritage** which focuses on built heritage covering restoration, archaeological, cultural monuments, and cultural heritage sites. The second category is **Intangible Heritage** covering conservation programmes, development programmes, and dissemination programmes. The third and fourth categories are the **Oral Traditions** covering the documentation of the Seychelles Oral Traditions and the **Kreol Language** covering study or research conducted on the Kreol Language respectively.

Social practices and the different rituals of Seychellois people are documented, with a complete list of all religious celebrations available. The Seychellois people have a good knowledge or practices related to nature and the traditional crafts are fairly well documented with a number of heritage research programmes conducted in the last 30 years.

Disc Jockey has also managed to attract a few artists (5%) who perform mainly at parties and other places such as nightclubs. Those performing at nightclubs are expected to perform every weekend with the possibility of a during-the-week session whereas those performing at parties will do so whenever requested.