Bulletin of Geography. Socio–economic Series / No. 39 (2018): 31–52

ISSN 1732–4254 quarterly

BULLETIN OF GEOGRAPHY. SOCIO–ECONOMIC SERIES
journal homepages:
http://www.bulletinofgeography.umk.pl/
http://wydawnictwoumk.pl/czasopisma/index.php/BGSS/index
http://www.degruyter.com/view/j/bog

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Suburban creativity: The geography of creative industries in Johannesburg

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How to cite:
Gregory, J. and Rogerson, C. (2018). Suburban creativity: The geography of creative industries in Johannesburg. *Bulletin of Geography. Socio-economic Series*, 39(39), 31-52. DOI: http://doi.org/10.2478/bog-2018-0003.

Abstract. Creativity is an increasing scholarly focus for urban and economic geographers. The aim in this paper is to contribute to what is so far mainly a Northern literature around the locational characteristics of creative industries. The results are analysed from a comprehensive audit undertaken of creative industries in Johannesburg, South Africa's leading economic hub. In common with certain other investigations of creative industries the largest component of enterprises in Johannesburg is creative services involving the production of goods or services for functional purposes. An aggregate picture emerges of the geography of creative industries in Johannesburg as strongly focused in suburban areas rather than the inner-city and its fringe areas. Nevertheless, certain differences are observed across the eight categories of creative industries. The evidence concerning the spatial distribution of creative industries in Johannesburg provides a further case for re-positioning the suburbs in post-Fordist debates around creative city economies and for re-examining neo-liberal cultural policies that preference inner-city areas.

Article details:
Received: 15 May 2017
Revised: 20 October 2017
Accepted: 03 February 2018

Key words:
creative industries,
suburbs,
inner-cities,
Johannesburg,
South Africa.

Contents:

1. Introduction

Creativity is considered to represent a dynamic focus for research across diverse disciplinary fields including sociology, anthropology, urban studies, economics, organizational studies and human geography (Bain, 2016). For Allen Scott (2014: 565) creativity "is a concept whose time has come in economic and urban geography". For other scholars creativity is viewed at the core of the twenty-first century's knowledge economy (Yum, 2016) and the fuel or new gold of the modern global economy (Flew, 2013; Gibson, 2014). Lampel and Germain (2016) stress that governments increasingly are seeing creative industries as pioneers of innovation and experimentation. Jones et al. (2016) go a step further and argue that the growth of creative industries is contingent upon a process of continuous innovation. Mitkus and Maditinos (2017) maintain that creative industries are a stimulus for innovation as well as exhibit growth, efficiency and stability even in times of economic uncertainty.

Not surprisingly, the economic significance and policy relevance of creative industries is rising at the global level (Garnham, 2005; Foord, 2008; Kong, 2014; Marco-Serrano et al., 2014; Jones et al., 2015; Sternberg, 2017). Gong and Hassink (2016) view creative industries as one of the newest contributors to the scale and variety of economic activities dependent on the creative class. Arguably, across many countries such activities now are a lever for growth in the knowledge economy and vital catalysts for urban economic expansion and regeneration (Cunningham, 2010; Flew, 2013; Cruz, Teixeira, 2015; Flew, Pintilii et al., 2015; Tafel-Viia et al., 2015; Bialic-Davedra et al., 2016). Throughout much of the European Union creative industries are considered as "a largely untapped resource" and a "potential economic powerhouse" (Mitkus, Maditinos, 2017: 1). In particular, for urban policy-makers clusters of creative industries are identified as at the 'cutting edge' for new place-based (local) economic development interventions (Gdaniec, 2000; Scott, 2006; Flew, Cunningham, 2010; Rogerson, 2014; Cunningham, Potts, 2015; Yum, 2016; Gong, Hassink, 2017).

During the 1990s, following the recognition by the United Kingdom government of creative industries as 'central' to the making of its post-industrial economy, there has occurred a marked upturn in international academic and policy discourse around creative industries (White, 2010; Kong, 2014; Cruz, Teixeira, 2015; Cunningham, Potts, 2015; Jones et al., 2015; Tremblay, 2015; Bialic-Davedra et al., 2016; Lampel, Germain, 2016; Lazzeretti et al., 2017; Mitkus, Maditinos, 2017). Sternberg (2017) maintains that creative segments of economies emerged and subsequently strengthened as a popular target for policy-makers in particular after the publication of Florida's (2002; 2005) seminal works on the 'creative class'. Further stimulus for policy attention on creative industries derived from the popularisation during the early 2000s of the concept of the 'creative city' (Landry, Bianchini, 1995; Landry, 2000). Certain observers caution, however, that the creative economy as a development policy tool not only has strengths but also certain theoretical-conceptual weaknesses (Sternberg, 2017). This said, from the early 2000s the popularity of creative industries advanced from its heartland origins in Europe and North America and spread to appear on the policy agendas – national and local - of several countries in the Asia-Pacific region including Australia, Indonesia, New Zealand, Singapore, South Korea and China (Cunningham, 2009; 2010; Keane, 2009; 2013; Flew, 2010; Daniel, 2013; 2014; Kong, 2014; Pan, 2015; Fahmi et al., 2017).

For much of the 1990s creative industries were linked mostly to the physical and economic regeneration of mostly declining post-industrial areas of Northern cities (Garcia, 2004; Mooney, 2004; Grodach, Loukaitou-Sideris, 2007; Jensen, 2007; Pratt, 2008; Evans, 2009; Couch et al., 2011; Comunian, Mould, 2014; Heidenreich, Plaza, 2015; Breitbart, 2016). Binns (2005) notes that clusters of "creative" led regeneration harnessed the potential of creativity to redevelop spaces for the production and consumption of cultural and creative goods or services. Excitement surrounding the concepts of the creative class and the creative city precipitated the international spread of creative city policies (Flew, Cunningham, 2010) which underscored the promotion of creative clusters often linked to key urban outcomes such as bolstering urban renewal and place-making initiatives (Mommaas, 2004; Foord, 2008). The concept of the creative cluster was associated with catalysing urban regeneration, branding or place-making initiatives in Northern cities. Beyond the urban global North, however, several cities in China also actively adopted the idea of creative clusters as a vehicle of regeneration as well as stimulus for creative consumption (Keane, 2009, 2013; He, Gebhardt, 2014). As argued elsewhere, this rapid international spread of creative industries can be viewed in many respects as an example of a 'travelling' policy concept (Gregory, Rogerson, 2016). Its diffusion to and 'travels' around the global South and expanding influence upon development policies was inevitable (Fahmi et al., 2017). Impetus was given by the concept's endorsement by a number of United Nations agencies (Sternberg, 2017) especially the United Nations Conference on Trade and Development (2008, 2010, 2013) which sees creative industries as a new growth engine for developing countries (Flew, Cunningham, 2010; Flew, 2013).

Questions have been raised about the extent to which Africa can simply buy into the international creative economy discourse including as a result of the relative lack of academic scholarship on the topic (De Beukelaer, 2017). South Africa is the prime focus for the development of creative industries in sub-Saharan Africa. In common with the international experience, government policy makers in South Africa – both at national level and city scale – have embraced enthusiastically the concept of creative industries since 2000 and explored policy options for their encouragement (Gregory, Rogerson, 2016). Correspondingly, the growth of an economy of creative industries in South Africa attracted some research attention with the appearance of a number of useful contributions variously around film and television (Visser, 2014; Collins, Snowball, 2015; Collins et al., 2016; Snowball, 2016), new media (Booyens et al., 2013), creative tourism (Rogerson, 2006a; 2007; Booyens, Rogerson, 2015), fashion (Rogerson, 2006b) and the craft sector (Rogerson, 2000; Rogerson, Sithole, 2001; Rogerson, Rogerson, 2010; 2011). In addition, the urban policy challenges for developing creative industries have come under scrutiny in both the inner-cities of Cape Town and Johannesburg (Booyens, 2012; Booyens et al., 2013; Booyens, Rogerson, 2015; Gregory, Rogerson, 2016).

One essential topic in the growing scholarship around creative industries relates to the spatial distribution of these activities. The critical importance of the geographical dimension to the emergence, development and thriving of creative industries is highlighted in particular by Jones et al. (2015) and by Gong and Hassink (2016, 2017). Economic geographers focus on the spatial dynamics of creative industries which include analysis of not only their patterns of spatial distribution but also "the formation, development, growth and even the decline of creative clusters" (Gong, Hassink, 2016: 3). Within this context the aim in this paper is to contribute to what is so far mainly a Northern literature around "poles of creativity" (Pintilii et al., 2015) by investigating the locational characteristics of creative industries in one city of the global South. The focus is upon South Africa's leading economic hub, the city of Johannesburg, where creative industries have been identified as a focus for policy support towards economic diversification (Rogerson, Rogerson, 2015). The paper is structured into two further sections of discussion. The next section provides a review of scholarship around locational issues concerning creative industries. Attention then moves to Johannesburg and a mapping and analysis of the geographical patterns of creative industries in the city.

2. Locating creative industries

The geographical distribution of creative industries has been explored at a variety of scales of analysis and in a number of different countries. It is evident that creative industries are not evenly distributed across space but rather are spatially concentrated in particular locations (Boix et al., 2014; Środa-Murawska, Szymańska, 2016; Pintilii et al., 2017). Arguably, the dominant picture as described by Gibson and Brennan-Horley (2016: 244) is that "firms have a predilection towards sizeable cities – ex-industrial powerhouses or cities of global stature – and towards particular northern hemisphere cities in the industrialized West". Outside of these areas, a number of investigations have revealed a creative industries economy operating in many small towns as well as rural areas (Bell, Jayne, 2010; White, 2010; Daniel, 2013, 2014; Gibson, 2014).

In a major overview of the underpinnings of the economic geography of creative industries Gong and Hassink (2016) identify three complementary, albeit not necessarily exclusive, drivers that impact the space economy of creative industries. The first and most widely discussed is that of agglomeration economies. These basically function as centripetal forces that foster the incubation and attraction of creative industries in spaces with specific characteristics. At the macro-scale the evidence points to creative industries as tending to concentrate in cities – especially large cities – since these can provide a suite of urban amenities and a quality of place that is especially attractive to the creative class (Florida, 2002; Gong, Hassink, 2016). It is argued that the locational preferences of creative individuals are for working and living in cities with a high level of cultural services, open-mindedness, and tolerance towards non-mainstream lifestyles. At the micro-scale within cities localization economies are seen as acting to concentrate enterprises in particular spaces because of external benefits accruing to co-located firms, knowledge spillovers as well as local access to specialized suppliers (Gong, Hassink, 2017). The high degree of spatial concentration observed in creative enterprises can transform creative clusters into a 'creative field' or 'creative local production system' that is denoted by specific features that nourish and facilitate the concentration of creative industries (Gong, Hasssink, 2016).

In addition to the role of agglomeration in shaping the geography of creative industries Gong and Hassink (2016) identify two further sets of key drivers. Emerging out of the literature on evolutionary economic geography increased attention surrounds the concept of 'routine replication' as another explanation for spatial concentration. It is argued that 'spin-offs' of new firms established by employees of creative enterprises within the same or related industries are important to understand as they tend to agglomerate in space and thus nurture creative clusters. Overall, it is considered that the routine replication notion emphasizes the significance of knowledge transfers among creative enterprises and thereby offers fresh insight into the evolving space economy of such firms. The third key driver of the economic geography of creative industries concerns institutional environments. The role of both formal and informal institutions is highlighted as crucial for understanding the spatial distribution of creative enterprises at all scales. The argument is that of necessity geographical clusters of creative enterprises require that private and public institutions function smoothly. In particular, urban, regional and local policies as well as those of central government can be important influences on location patterns (Gong, Hassink, 2016).

At the intra-urban scale of analysis debates about the geography of creative industries historically have focused traditionally on inner-city or central city areas. The locational characteristics of creative industries often were linked to post-industrial, inner or sub-central urban areas where creative businesses move into, occupy and re-use old industrial premises (Hutton, 2004). In addition, creative industries re-purpose and reconstruct the physical and social structure of cities through processes of re-development and gentrification (Banks et al., 2000; He, Gebhardt, 2014). In particular, the 'alternative' more affordable workspaces in and around the city centres and the city fringe are common focal points for such activities. The cheaper rental districts of fringe areas are viewed as an indispensable resource and base from which to develop ideas, projects and markets; such areas often provide opportunities for creative enterprises and for collective or local collaborative initiatives (Banks et al., 2000). According to Hutton (2004) creative clusters concentrate in inner city areas because of the presence of the innovative milieu which the city offers. Various urban facilities such as galleries, museums, exhibition spaces, heritage buildings, parks, squares, restaurants, cafes and shops add to the attractions for creative entrepreneurs to establish in inner cities. Overall, underutilised or unutilised old downtown districts are seen widely as offering the most ideal and affordable workspace for creative entrepreneurs (Hutton, 2004). This said, it is acknowledged that with neighbourhood change and gentrification property prices rise with the consequence that many creatives look elsewhere for business premises (Pratt, 2009).

New critical directions are appearing in the scholarship around creative industries and their geographies. Over the past two decades the imagined geographies of creative industries have been inextricably wedded to inner city areas (Comunian et al., 2010; Flew, Cunningham, 2010; Comunian, 2011; Comunian, Mould, 2014). It is observed that researchers have 'fixated' on the locational factors – buzzing street life, vibrant arts districts, museums, festivals, entertainment and music scenes – that attract the creative class to central cities rather than suburbs (Bain, 2016). The argument that creativity in cities necessitates the 'buzz' of inner cities, however, is increasingly under scrutiny (Shearmur et al., 2016). This challenge is countering also the mainstream of the so-termed "fast-policy model of neoliberal cultural urbanism which targets the central city as the key site of creativity and innovation to the neglect of suburbs" (Bain, 2016: 266). Gibson and Brennan-Horley (2016: 241) aver that geographical clusters "have become axiomatic in theories of creativity". A common trait of cluster theories and associated cluster policies is an explicit or implicit assumption that the mere spatial concentration of firms "will almost automatically be associated with beneficial knowledge networks and knowledge spillovers" which in turn will foster creativity (Huber, Fitjar, 2016: 255). Although clusters of creative enterprises exist it is increasingly questioned as to the extent to which they necessarily strengthen collaboration between local enterprises and trigger dynamic local interactions and further creativity. In a number of cases it is revealed that creativity is 'invisible' to researchers precisely because it is not clustered. As Shearmur et al. (2016: 221) assert non-clustered activity, by virtue of it being dispersed, is, to a large degree, hidden from the scholarly gaze. Furthermore, as Bain (2016) points out isolated creatives often are overlooked for the simple reason that they are geographically isolated for example in rural areas, non-metropolitan spaces or suburban locales (Drake, 2003; Gibson, Brennan-Horley, 2006; Escalona-Orcao et al., 2016).

In particular, Bain (2016: 267) stresses that in the "dominant scholarly narrative, suburbs are dismissed as too young and too new to be creative" and instead are framed as places that are "the antithesis of all that is unique, interesting, genuine or authentic". In many writings the suburbs are construed simply as unproductive, passive, and culturally moribund. Essentially these are places that are viewed as non-creative and are to be consigned to the 'scrap-heap' of economic dynamism (Shearmur, 2012; Bain, 2016). The notion that suburbs are 'sub-creative' has been challenged particularly in new research about Canadian and Australian cities (Flew et al., 2012; Bain, 2016). In Australia a growing scholarship documents creative industries in suburban and outer suburban areas (Drake, 2003; Gibson, Brennan-Horley, 2006; Felton et al., 2010a; Felton, Collis, 2012; Collis et al., 2013). Accordingly, there is emerging an alternative stream of research on creativity which is directly challenging the logic of "the metro-centricity of creative city discourse" by showing the existence and flourishing of creativity outside of inner-city locales (Bain, 2016: 269). It is demonstrated that "just because suburbs do not conform physically or socially to the image of dense clustered cultural districts does not mean that they are 'uncreative' zones" (Bain, 2016: 269). Instead suburbs have been shown to foster spaces for a range of creative enterprises often in locations which are de-centred and dispersed (Bain, 2016).

Among others Gibson and Brennan-Horley (2016) stress that suburban spaces can assume an important role in creative city economies. It is recognized that the suburb is not purely residential and that suburbs have become economically and culturally complex (Teaford, 1997; Phelps, 2010; Phelps, Wood, 2011). Phelps (2010) notes that in the past the imagined geographies of the suburbs have been viewed as dormitories or purely residential in character and that the 'real' economy was therefore to be found in central city areas. Several observers are undermining this stance by pointing to structural shifts in the suburban landscape and that in many cities low density suburbs have been filled with mixed-use developments that enable the growth of large scale multi-purpose buildings and thereby changing the structure, functional uses and experience of the suburbs (Drake, 2003; Phelps, 2010; Phelps, Wood, 2011). Arguably, suburbs are no longer strictly locations of home life and a retreat from working life, but increasingly now are spaces of demographic plurality and socio-economic complexity including as a base for creative industries (Drake, 2003; Phelps, 2010; Phelps, Wood, 2011). Indeed, Teaford (1997) recognizes that suburbs have become what he terms 'post-suburban' – becoming completely independent from the city. The growing discourse on the presence of creative industries in suburban areas contributes to challenging the imagined geographies of both the suburb and creative industries (Drake, 2003; Gibson, Brennan-Horley, 2006; Gornostaeva, 2008; Felton et al., 2010b; Gibson, 2014). The often scattered suburban economy contradicts the idea of economic agglomeration, the premise on which the creative economy is built (Phelps, 2010). Despite this there is evidence that the geography of creative industries is more complex, and less spatially concentrated, than much creative industries thinking usually assumes (Drake, 2003; Gibson, Brennan-Horley, 2006; Gornostaeva, 2008; Felton et al., 2010a; Gibson, 2014).

Several reasons have been put forward to account for the growth of creative industries outside of inner-city locations. Advances in technology with increased connectivity and better telecommunications enable locational flexibility of certain creative industries. Despite the application in creative industries of new technologies, 'creative place' thinking over the past two decades usually stresses the importance of clustering and proximity of a network available in inner cities (Landry, Bianchini, 1995; Landry, 2000; Florida, 2002) according minimal attention to the impact of technology on the choice of location for creative industries (Felton et al., 2010b). This said, a growing scholarship shows the importance of technology in location decision factors for creative industries beyond the inner city (Collis et al., 2010; Felton et al., 2010a). As Felton et al. (2010b: 626) explain "the efficiencies that technology enables – reducing commuting and meeting time and potentially lowering labour costs through scalability of production – contribute to the cost benefits of creative businesses in locations beyond the inner city". In particular, creative industries that rely on digital technology are easier to decentralize than other creative industries such as the arts. Indeed, it is observed that creative industries "such as multimedia, graphic design and advertising are heavily reliant on technology for production, distribution and communication" (Felton et al., 2010a: 64). Gornostaeva (2008) and Gornostaeva and Pratt (2006) identify that within the film and television industry post-production activities usually are undertaken by subcontracted companies – and with the latest development of technologies these type of activities do not demand office space, requiring only access to a personal computer and internet connection.

Beyond technological change the rising cost of rent and the affordability of Northern inner city locations is a push factor for creative industries to decentralize to suburban locations. Drake (2003) states that the location-decision making process of creative industries (like many other activities) is influenced by the cost of rent. Collis et al. (2010: 107) state that in Australia "for many creative workers, the inner city has simply become too expensive a place to be in which to work and live so they have moved out to the more affordable outer suburbs". The trend for creative industries to decentralize because of rising rents in central areas has been documented also in cities of the United Kingdom, France and the USA (Gornostaeva, 2008; Scott, 2000, 2005). For the USA, Scott (2005) observes that decentralization occurs especially within the film and television sectors that require larger studio space or with other creative activities that can operate from home-based offices or studios. Rising rentals in inner-city locations are inseparable from urban regeneration initiatives and escalating property costs in many Northern cities (Gibson, Brennan-Horley, 2006; Gornostaeva, 2008; Collis et al., 2010). The process of urban regeneration and property speculation with its linkages to the displacement of many low-income residents as well as micro and small creative enterprises from inner city locations is well documented (Gibson, Brennan-Horley, 2006; Collis et al., 2010; Novy, Colomb, 2013). It is important to observe that due to the precarious economy of creative industries often micro and small creative enterprises and artists are the first to be displaced and outpriced in circumstances of a rising property market (Gibson, Brennan-Horley, 2006; Collis et al., 2010). Thus, the creative urban policies that have been used to advance the creative city and creative class agenda have contributed to inflating property markets and an exodus of certain small scale creative enterprises out of inner cities into more affordable suburban locations (Montgomery, 2005; Peck, 2005; Krätke, 2010). This said, works by Collis et al. (2010), Gibson and Brennan-Horley (2006) and Flew (2013) argue that the category of creative industries spans a wide range of activities and that larger creative enterprises, which are often focused on creative services, are better able to withstand rising inner city rentals.

3. Locating creative industries in Johannesburg

In parallel to the international scholarship on creative industries the extant research on creative industries in South Africa mainly is concentrated on inner-city areas (Booyens, 2012; 2013; Booyens, Rogerson, 2015; Gregory, 2016; Hoogendoorn, Gregory, 2016). Only a handful of research investigations address questions about creative industries outside of the inner cities. The most important exceptions are Ingle's (2010) study on the creative class in the rural Karoo and Visser's (2014) investigation on the geography of the film industry of South Africa. The latter study highlights the importance of suburban areas for the operations of creative enterprises associated with the film industry of South Africa.

The city of Johannesburg provides a particularly interesting case study for research on the geography of creative industries (Rogerson, 2018). South Africa's largest metropolitan area has experienced a process of economic decentralization and capital flight away from the inner-city to newer decentralized suburban nodes such as Randburg and Sandton (Rogerson, Rogerson, 1995, 1999, 2015; Murray, 2011; Todes, 2012; Harrison et al., 2015). The hollowing out of the economy of Johannesburg inner city began in the 1980s and accelerated during the 1990s with capital disinvestment and municipal neglect. The decentralisation of activities occurred both in manufacturing and in terms of commercial office/retail developments with many businesses relocating from the inner-city to the rising multi-functional suburban business nodes (Rogerson, 1996; Murray, 2011; Harrison et al., 2015). The economic demise of Johannesburg inner city thus was accompanied by the growth of new decentralized business/commercial nodes, the most important of which are Rosebank, Randburg, Midrand and most dramatically of Sandton which emerged as the core financial area of metropolitan Johasnnesburg. Indeed, amidst worsening decay in the inner-city, in 2000 the decision was made to relocate the Johannesburg Stock Exchange to Sandton which represented a landmark event in terms of the exodus of major commercial businesses away from the inner-city (Parnreiter et al., 2013). However, during the 2000s a number of initiatives were launched by the municipal authorities to breathe back economic life into the inner-city (Rogerson, 2004; Harrison et al., 2015). Following the examples of cities in North America and Europe, creative industries were identified as one base for assisting the regeneration of the declining inner-city (Gregory, 2016; Hoogendoorn, Gregory, 2016).

The findings of this research provide an analysis of the size and spatial structure of creative industries in Johannesburg. The various subsectors of creative industries in Johannesburg are defined using the UNCTAD (2008) creative industries classification, viz, cultural sites and traditional cultural expressions, performing arts, visual arts, audio-visuals, publishing and print media, new media, design, and creative services. Methodologically, a comprehensive audit of creative industries in Johannesburg was undertaken for 2015 through the cross-referencing of association databases and directories. This audit allowed the construction of the space economy of creative industries as a whole in Johannesburg as well as an unpacking of the detailed geographies of different types of creative industries.

The audit disclosed a total of 2,325 creative businesses operating in Johannesburg during 2015. Table 1 differentiates the analysis in terms of the UNCTAD's (2008) classification of creative industries. It reveals an uneven distribution across the eight categories with over-half of the enterprises concentrated in only two of these categories. The group of creative services, which includes architectural services, advertising and digital and other creative services, emerges as the largest component of creative industries in Johannesburg with 726 firms representing almost one-third of the total. The next most important category is that of audio-visuals constituting 23 percent of enterprises followed by visual arts (14 percent) and design (10 percent). The segments of creative industries with the lowest number of enterprises in Johannesburg are the performing arts, cultural sites, and new media.

Figure 1 provides a mapping of the overall spatial distribution of creative industries across different regions of the city. In total 12 different sub-regions are utilised for analysis. Fig. 1 demonstrates that the creative industries economy of Johannesburg is massively weighted away from the inner-city and instead is concentrated in the city's northern suburban areas and in particular around the decentralized business nodes. Table 2 provides the proportionate share of each sub-region in Johannesburg's creative industries economy. It is revealed that an uneven spatial pattern of creative industries exists with the important finding that the largest proportion of cre-

Table 1. Number of creative enterprises in Johannesburg by category

Subsectors	Total	%
Cultural Sites and Traditional Cultural Expressions	119	5
Performing Arts	47	2
Visual Arts	315	14
Audio-visuals	524	23
Publishing and Print Media	196	8
New Media	167	7
Design	231	10
Creative Services	726	31
Total	**2,325**	**100**

Source: Author's calculations

ative industries are located outside of central Johannesburg, which includes the inner-city. Overall, it is shown that the three sub-regions with the highest concentration of creative industries are Sandton with 598 enterprises, Randburg with 529 enterprises and the Northern suburbs (with 269 enterprises) focussed around Rosebank (Table 2). Together these three areas of metropolitan Johannesburg account for 60 percent of the cohort of creative enterprises. By contrast, the total of 172 creative enterprises in the central area of Johannesburg, comprising the inner-city and immediate fringe areas, represents only 7 percent of the population of creative enterprises. The areas of Johannesburg which record the lowest numbers of creative enterprises are, however, the city's Western suburbs, Eastern suburbs and the South West which includes Soweto the apartheid-created former black residential area. Of Johannesburg's population of creative enterprises it is notable to record that only 4 percent are found in the townships of Soweto or the mainly Indian residential area of Lenasia.

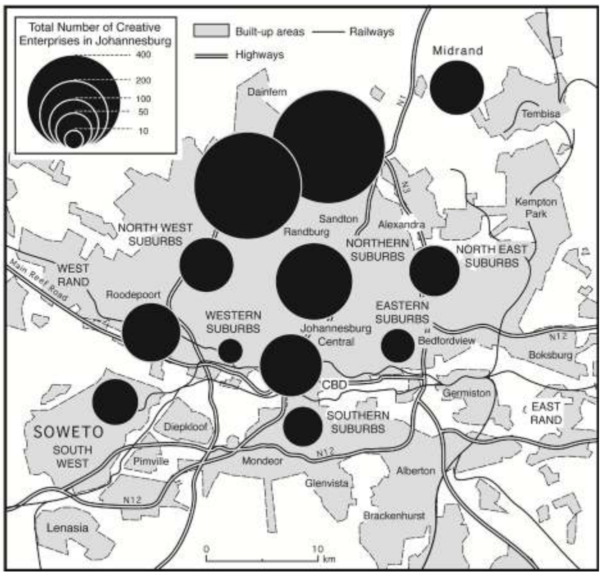

Fig. 1. Spatial distribution of creative industries in Johannesburg
Source: Authors

4. Discussion

In terms of analysing further the geography of creative industries in Johannesburg attention turns now to examine the structure of creative industries across the various sub-regions of the city. Table 3 shows the total number of creative enterprises in

Table 2. Number of creative enterprises per sub-region

Sub-region	Number of enterprises	%
Eastern Suburbs	47	2
Johannesburg Central	172	7
Midrand	131	6
North Eastern Suburbs	112	5
North Western Suburbs	131	6
Northern Suburbs	269	12
Randburg	529	23
Roodepoort	154	7
Sandton	598	26
South West	92	4
Southern Suburbs	67	3
Western Suburbs	23	1
Total	**2,325**	**100**

Source: Author's calculations

Table 3. Creative industries in Johannesburg differentiated by category and sub-region

City Regions	Subsectors								
	Cultural Sites	Visual Arts	Performing Arts	Audio-visuals	Design	Publishing and Print Media	New Media	Creative Services	Total Enterprises per Sub-Region
Eastern Suburbs	3	12	0	7	6	4	0	15	**47**
Johannesburg Central	**20**	28	**18**	23	13	21	6	43	**172**
Midrand	6	13	1	19	19	15	14	44	**131**
North Eastern Suburbs	5	12	1	29	6	6	8	45	**112**
North Western Suburbs	4	15	5	62	11	3	5	26	**131**
Northern Suburbs	8	49	8	59	21	16	17	91	**269**
Randburg	9	**80**	3	**151**	**58**	**43**	**38**	**147**	**529**
Roodepoort	9	18	2	29	25	20	10	41	**154**
Sandton	12	**80**	7	**126**	**54**	**46**	**56**	**217**	**598**
South West	**28**	2	1	14	8	10	6	23	**92**
Southern Suburbs	8	3	1	3	10	10	7	25	**67**
Western Suburbs	7	3	0	2	0	2	0	9	**23**
Total Creative Enterprises per Subsector	**119**	**315**	**47**	**524**	**231**	**196**	**167**	**726**	**2,325**

Explanation: The two most important sub-regions for each category of creative industries are indicated in bold type
Source: Authors calculations

each subsector across the different sub-regions. Figures 2-9 map the distribution of creative enterprises across the 12 sub-regions of the city. Several important findings are observed. In terms of the absolute numbers of enterprises the Sandton and Randburg sub-regions emerge as dominant for six of the eight UNCTAD categories. More specifically, across the categories of visual arts, audio-visuals, design, publishing and print media, new media and, most importantly, for the largest group of creative services the decentralized business nodes of Sandton and Randburg and their surrounds are the leading foci for these activities. Indeed, approximately 50 percent of all Johannesburg's creative services enterprises are situated either in Sandton or Randburg (Fig. 2). Within the category of creative services it was observed that advertising and marketing enterprises mostly locate in either Sandton or Randburg whereas the group of architectural services largely are situated in the Northern suburbs. The new media group of enterprises focus on software development, digitised creative content and video games.

In the category of new media the largest segment of enterprises again are located in Sandton followed by Randburg, the Northern suburbs and Midrand (Fig. 3). The audit indicated that there are 167 new media enterprises in Johannesburg. Once again, the largest number of these enterprises is found in the Sandton region at 34 percent followed by Randburg with 23 percent of total enterprises. The undeveloped character of creative industries in the Eastern and Western suburbs of the city is reconfirmed as these areas had no new media activities. In respect of software development services it was disclosed that Sandton contains the largest share of these enterprises followed by Randburg and Midrand. By contrast, central Johannesburg records the lowest number of companies involved with software development. Nevertheless, of interest is the planned development of the Tshimologong precinct in Braamfontein, part of central Johannesburg, which is to be a tech-hub and functioning as an incubator for software development and other digital innovation. By 2015, this project was still at its developmental stage. The video game development industry, which is an important component of new media in the economy of many creative cities is undeveloped in Johannesburg; the majority of video game developers in South Africa are based in Cape Town. The digital media economy is predominately based in Sandton, followed by Randburg, and the Northern suburbs. The sub-region of Central Johannesburg, including the inner-city, records the smallest number of digital media enterprises.

The UNCTAD (2008) indicates two subgroups within media, namely the audio-visual industry, and publishing and print media. Both of these subgroups produce creative content with the purpose of communicating with large audiences. With a total of 524 enterprises the audio-visual industry of Johannes-

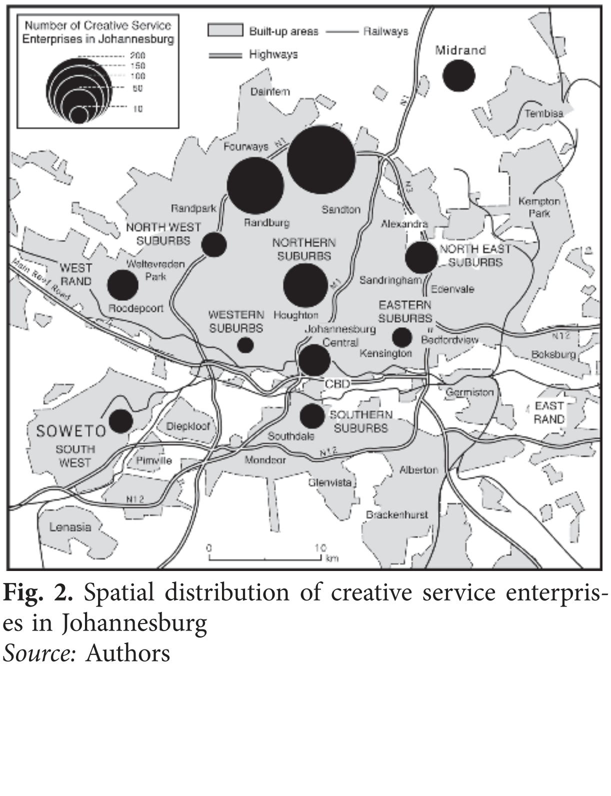

Fig. 2. Spatial distribution of creative service enterprises in Johannesburg
Source: Authors

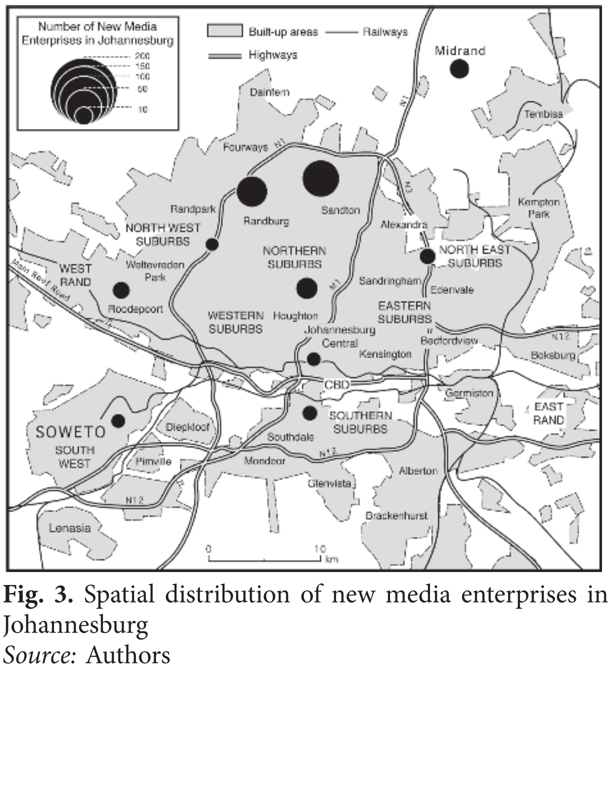

Fig. 3. Spatial distribution of new media enterprises in Johannesburg
Source: Authors

burg is a significant component of creative industries in the city. Geographically, the largest group of these enterprises are located in the Randburg region (29%) due to the presence there of the headquarters of MultiChoice South Africa (Fig. 4). This enterprise is the leading video entertainment operator in South Africa and services through its pay television operations over four million subscribers with entertainment material sourced both locally as well as channels from around the world. Importantly, the company has a record of introducing innovative technologies in terms of television decoders, high definition channels and mobile television. The audio-visual industry of South Africa is strongly focussed around MultiChoice with a host of creative enterprises engaged in pre- and post-production activities. Randburg and Sandton thus are at the heart of Johannesburg's audio-visual economy. The location of the facilities of the public broadcaster, the South African Broadcasting Corporation (SABC), north west of the city centre, explains the third most significant grouping of audio-visual enterprises in the North Western suburbs as well as the Randburg area. Since 1985, when Multi-Choice built their main headquarters and studio space at Ferndale, Randburg most businesses involved within the film and television industries (such as pre- and post-production companies) have located in relative close proximity to either the SABC or MultiChoice facilities (Visser, 2014). The few exceptions are studio spaces clustered in the North Eastern suburbs and in central Johannesburg. Other sub-regions such as the South West region, Western and Southern suburbs of the city have minimal involvement in the economy of audio-visual enterprises.

The geography of publishing and print media is shown on Fig. 5. In terms of this category of creative industries in Johannesburg a total of 196 enterprises were recorded. The largest share of these enterprises are once again in Sandton (23 percent) and Randburg (22 percent). Historically, print media and publishing was based in central Johannesburg; currently, much of this activity has decentralised operations and located close to the city's northern business nodes (Rogerson, Rogerson, 1995). For example, major industry leaders such as Media24, the print media wing of the Naspers conglomerate, has offices in Sandton as well as occupying the Media Park in Auckland Park, North West of the city centre. At present the sub-region of Central Johannesburg and its fringe areas represents 11 percent of publishing and print media activities and now is the third largest focus of activity. The Eastern, Western and North Western suburbs of the city have a limited number of publishing and print media activities (Fig. 5).

The design sector incorporates services such as interior design, graphic design as well as fashion and jewellery. It was disclosed that there are 231 design-related enterprises in Johannesburg. The larg-

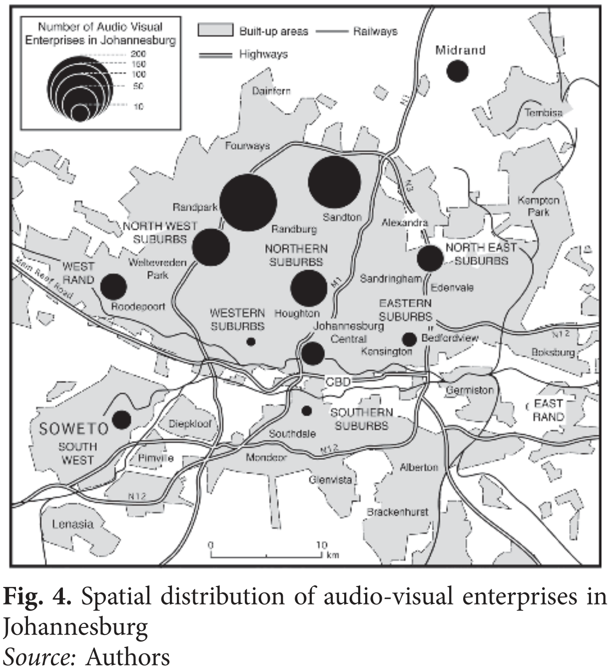

Fig. 4. Spatial distribution of audio-visual enterprises in Johannesburg
Source: Authors

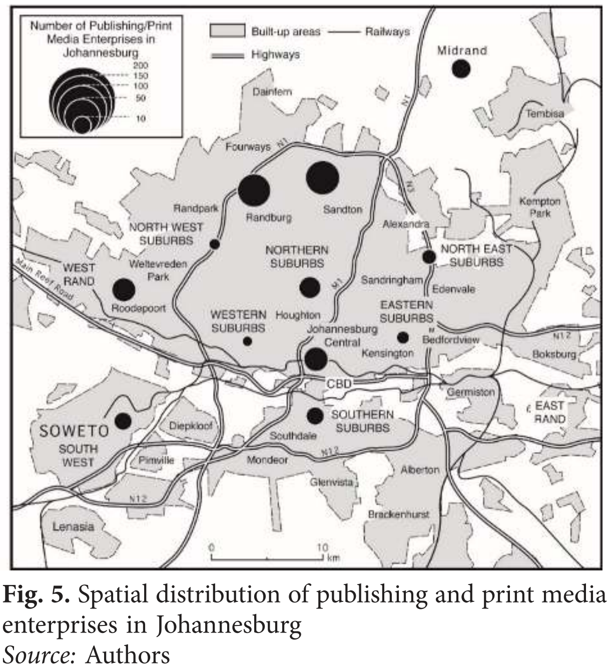

Fig. 5. Spatial distribution of publishing and print media enterprises in Johannesburg
Source: Authors

est share of these activities is based in Randburg at 25 percent and the Sandton region at 23 percent. In common with other elements of creative industries it is disclosed that the Eastern and Western suburbs of the city have limited design-related activities. Within the sub-category of design, the focus is on graphic design, interior design, and fashion and jewellery design. In terms of the various subgroups of creative design, the largest number of graphic design companies are located in Randburg and Sandton with notably few graphic design activities in central Johannesburg (Fig. 6). The subgroup of interior design reflects a different location pattern with Sandton the overwhelming focus for these businesses. By contrast, the largest group of fashion design and jewellery design enterprises are in Randburg, the northern suburbs and central Johannesburg. Fashion and jewellery design based in the Northern suburbs, Randburg and Sandton often takes place at home-based studios. As part of regenerating the inner-city there is a planned fashion district in which young designers and associated retail outlets cluster in the eastern part of Johannesburg central businesses district (Rogerson, 2004; 2006b). Of note also is that the private sector inner-city redevelopment area around Maboneng precinct and its surrounding suburbs of Jeppestown and Doornfontein have studio spaces where fashion design also takes place (Gregory, 2016).

The subsector of the visual arts includes activities such as painting, sculpture and photography. As evidenced on Fig. 7 the spatial distribution of visual arts shows that 50 percent of Johannesburg's total of 315 visual arts establishments either are located in Sandton or Randburg followed by the Northern suburbs. The pattern of visual arts enterprises shows a close relationship with the wealthier residential areas of metropolitan Johannesburg. Other creative clusters of visual arts consumption include Melville, Parkhurst, Parkwood and at 44 Stanley, a creative complex of converted industrial buildings in Milpark and housing a variety of gallery spaces, antiques and collectibles. It is observed that central Johannesburg also is the location for a group of visual arts establishments as the abandonment of factories and offices from the inner-city offered affordable studio spaces for visual arts production. In terms of spaces of creative production for visual arts, the most prominent cluster is the Newtown cultural district, which offers a collection of studio spaces such as Assemblage, the Bag Factory and Artist Proof Studio that provide access to space, assistance to artists and an internal support network for producing visual arts. Elsewhere in central Johannesburg pockets of studio spaces exist both in Braamfontein and the Maboneng precinct. These are two areas which recently have emerged as vibrant spaces for the consumption of visual arts in

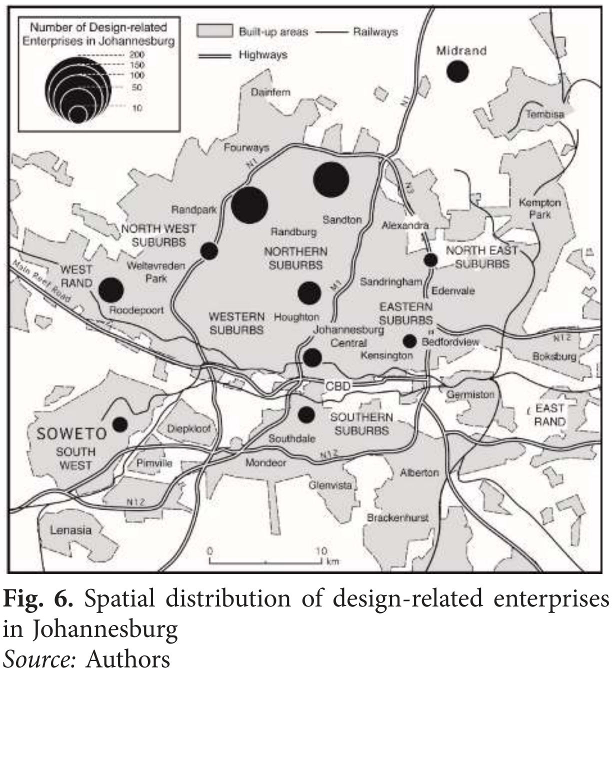

Fig. 6. Spatial distribution of design-related enterprises in Johannesburg
Source: Authors

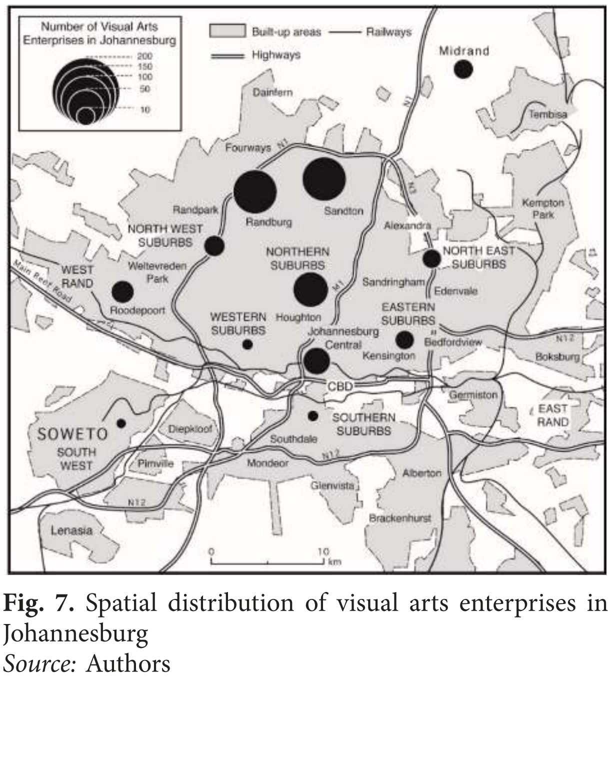

Fig. 7. Spatial distribution of visual arts enterprises in Johannesburg
Source: Authors

Johannesburg and offer a variety of gallery and exhibition spaces. The newly launched 'First Thursdays' initiative in Braamfontein is a new monthly event in which art galleries, restaurants and retail outlets collaborate to host an array of exhibitions and events on the first Thursday evening of the month.

The only categories of creative industries that the sub-regions of Sandton and Randburg do not dominate are those of cultural sites and the performing arts. The UNCTAD (2008) identifies cultural sites and traditional cultural expressions also as heritage. It is stated that "it is heritage that brings together cultural aspects from the historical, anthropological, ethnic, aesthetic and societal viewpoints, influences creativity and is the origin of a number of heritage goods and services as well as cultural activities" (UNCTAD 2008: 14). As shown on Fig 8 it is observed that this category of cultural sites and traditional cultural expressions which includes enterprises engaged in arts, crafts and heritage, is dominated by central Johannesburg and the South West region, mostly in Soweto. It was found that there are 119 creative industries in this category in Johannesburg with 24 percent of the total accounted for by the South West region (Soweto and Lenasia). Second, in significance is central Johannesburg which encompasses 17 percent of the total enterprises in this category. The Johannesburg city centre contains the largest concentration of heritage institutions with a total of 13 museums including Museum Africa in Newtown and Constitution Hill in Hillbrow. In addition, central Johannesburg is the location of key traditional market spaces for natural healing; the two most prominent for traditional trade are the Kwa Mai Mai market in Jeppestown on the eastern edge of the central business district and the Faraday or Ezinyangeni Muti Market on the southern edge of the CBD. The South West region, in particular Soweto, also is a significant location for cultural museums, including the iconic Hector Pieterson museum which is a commemoration of the anti-apartheid struggle and key focal point of heritage tourism in Soweto. Of note is that Sandton and Randburg, the core of Johannesburg's creative industries economy, are of limited importance in this category of enterprise.

The final category of creative industries within the UNCTAD (2008) classification is that of performing arts. The audit of creative industries in Johannesburg shows on Fig. 9 the location of performing arts establishments. It is disclosed that the majority of the city's 47 performing arts establishments are situated in central Johannesburg. On the northern edge of central business district, the Braamfontein area contains a cluster of performing arts facilities as well as four important theatres, namely the Joburg Theatre Complex and Joburg Ballet Compa-

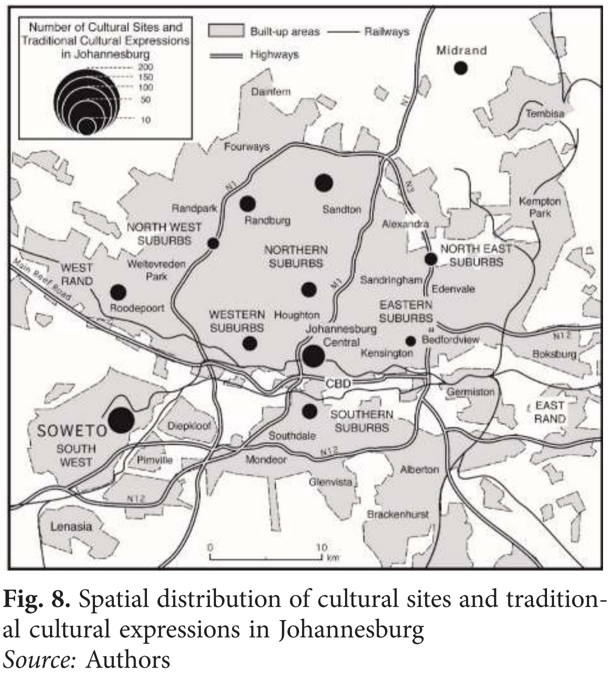

Fig. 8. Spatial distribution of cultural sites and traditional cultural expressions in Johannesburg
Source: Authors

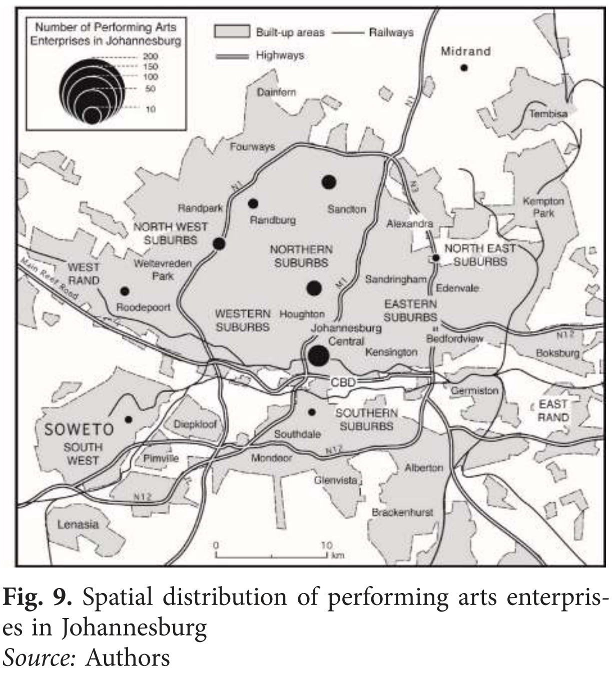

Fig. 9. Spatial distribution of performing arts enterprises in Johannesburg
Source: Authors

ny, Johannesburg Youth Theatre, Wits Theatre and the privately owned Alexander Theatre. Elsewhere in central Johannesburg, Newtown contains another group of performing arts activities. This area hosts creative enterprises such as Bassline, one of Johannesburg's most popular live music venues, the Market Theatre, Vuyani Dance Studio, the Dance Umbrella and Moving into Dance. Further, within the Maboneng precinct on the eastern edge of the CBD there is a small cluster of performing arts facilities which include the POP Art Theatre, and live music venues such as the Living Room, Pata Pata and Common Ground, an open park space with regular live music events most of which occur on weekends (Gregory, 2016). Beyond central Johannesburg other locations for the performing arts are mostly in privatised spaces such as malls or casino complexes; exceptions are the newly built Soweto theatre and the Roodepoort theatre. All other theatres are based within suburban malls, such as the Auto & General theatre on the Mandela Square at Sandton City, or Teatro which is based at the Monte Casino complex in Fourways.

From the foregoing analysis it is apparent that the different sub-regions of Johannesburg assume different roles in the city's economy of creative industries. In addition, the structure of each sub-region's creative industries economy is differentiated. Table 4 indicates the proportionate share of each category of creative industries within the ten largest sub-regions as indexed by numbers of enterprises. Several points are of note. First, in relative terms creative services assume the greatest significance within the North Eastern suburbs, Sandton, Midrand and the Southern suburbs; in each of these sub-regions creative services account for more than one-third of all creative industries. Second, the audio-visual enterprises are most strongly represented in the North Western suburbs and Randburg close to the headquarters of respectively the SABC and MultiChoice; in the North West suburbs the concentration on audio-visuals represents almost half of the total population of creative industries in the sub-region. Three, the category of cultural sites and traditional cultural expressions is most distinctive in terms of its high relative degree of significance for the sub-regions of South West and Central Johannesburg. Indeed, the structure of the creative industries economy in these two sub-regions is markedly different to that of the other sub-regions. Finally, in relative terms in examining the smaller categories of creative industries the following can be observed. The visual arts is, in relative terms, most important for the Northern suburbs and Central Johannesburg; the performing arts is of special importance for central Johannesburg; for design Roodepoort, Midrand and the Southern suburbs are of note; for printing and publishing media the Southern suburbs, central Johannesburg and Roodepoort stand out; and, for new media this is relatively important for Midrand and Southern suburbs. Overall these results show a spatially differentiated economy of creative industries across metropolitan Johannesburg.

5. Conclusion

This paper represents a contribution to the growing literature on the economic geography of creativity. The spatial distribution of creative industries in South Africa's leading economic hub was investigated through undertaking a comprehensive audit of these activities using the UNCTAD (2008) classification. In common with certain other investigations of creative industries in cities the largest component of enterprises in Johannesburg is that of creative services involving the production of goods or services for functional purposes. An aggregate picture emerges of the geography of creative industries in Johannesburg as strongly focused in suburban areas rather than the inner-city and its fringe areas. Nevertheless, certain differences were observed across the eight categories of creative industries.

The spatial characteristics of creative industries in Johannesburg confirms the arguments of Collis et al. (2010), Gibson and Brennan-Horley (2006) and Flew (2013) that creative industries cut across a wide range of activities and exhibit different locational characteristics often based on affordability of rent. This said, in contrast to Northern cities suburban locales in Johannesburg are more expensive than the inner city. It can be argued that larger creative enterprises in the city that focus on commercial creative services are better able to afford higher rentals in the northern suburban business nodes than micro and smaller creative enterprises that

Table 4. Proportionate Share (%) of Each Category of Creative Industries (2)

City Regions	Subsectors								Total Enterprises per Sub-Region
	Cultural Sites	Visual Arts	Performing Arts	Audio-visuals	Design	Publishing and Print Media	New Media	Creative Services	
Johannesburg Central	12	16	10	13	8	12	4	25	**172**
Midrand	4	10	1	14	14	11	11	34	**131**
North Eastern Suburbs	4	11	1	26	5	5	7	40	**112**
North Western Suburbs	3	11	4	47	8	2	4	20	**131**
Northern Suburbs	3	18	3	22	8	6	6	34	**529**
Randburg	2	15	1	28	11	8	7	28	**269**
Roodepoort	6	12	1	19	16	13	6	27	**154**
Sandton	2	14	1	21	9	8	9	36	**598**
South West	30	2	1	15	9	11	6	25	**92**
Southern Suburbs	12	4	1	4	15	15	10	37	**67**

Explanation: Figures do not add up to 100 percent in certain sub-regions because of rounding
Source: Authors calculations

seek out more affordable spaces in central Johannesburg. Whereas it has been observed in Northern cities that micro-scale creative enterprises are often displaced to suburban areas from inner cities to cheaper rental premises in suburban areas (Gibson, Brennan-Horley, 2006; Collis, 2010; Flew, 2013), in Johannesburg this process is only weakly in evidence. Arguably, in common with findings from Northern cities, advances in communication technologies can be an explanatory factor for the decentralised nature of creative industries in Johannesburg. New media creative businesses for example rely heavily on digital technology and often are conducted from suburban home based offices and studios. Another example of scattered geographies relates to audio-visual post-production activities that often operate from home based studios across Johannesburg. One distinctive segment of creative industries that evidenced a concentration in the inner-city was the performing arts. Likewise, the segment of cultural sites and traditional cultural expressions was notable for its geographical focus once again in central Johannesburg and in the township areas, including Soweto.

The evidence presented concerning the spatial distribution of creative industries in Johannesburg provides a further case for re-positioning the suburbs in post-Fordist international debates around creative city economies and for re-examining neo-liberal cultural policies that preference inner-city areas. In terms of local policies, currently the city of Johannesburg's policies on creative industries are influenced by mainstream international policies wedded to urban regeneration and city branding. Accordingly, they are narrowly focused only around creative industries in the inner city. The results of this investigation underline a need for rethinking the city's spatial policy focus around creative industries and for recognising the decentralised landscape of creative industries across Johannesburg.

Acknowledgement

Thanks are due to Wendy Job for preparing the accompanying maps. The comments received from two journal referees assisted in the revision of this paper.

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Ministry of Science and Higher Education
Republic of Poland

The proofreading of articles, positively reviewed and approved for publishing in the 'Bulletin of Geography. Socio-economic Series', was financed from the funds of the Ministry of Science and Higher Education earmarked for activities popularizing science, in line with Agreement No 509/P-DUN/2016.