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A Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage

Researcher: Prof. J. Snowball (PhD)

South African National Cultural Observatory, Senior Research Fellow;

Rhodes University, Professor of Economics



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Summary

The report sets out to develop and test a Monitoring and Evaluation Framework for publically funded arts, culture and heritage projects. From a review of the international literature, three kinds of cultural value were identified: Economic, Social and Intrinsic. Debates around the relationship of these values to each other and to their relevance to cultural policy were reviewed. Using South African and international case studies, a variety of valuation methods were discussed.

From the work on cultural indicators, five major cultural value “themes” were identified in line with the aims of the Mzansi’s Golden Economy funding guidelines developed by the Department of Arts and Culture. These were: Audience development and education; Human capital and professional capacity building; Inclusive economic growth; Social cohesion and community development; and Reflective and engaged citizens.

Examples of indicators for each theme were also identified. It was then demonstrated how the Framework could be applied to a wide variety of funded projects and how the emphasis of the Framework could be changed depending on the specific aims of each funding category. In terms of monitoring progress towards the stated goals of the project, a “Logic” model was suggested.

Key Findings



-M&E can be important tools for both funders and arts practitioners in terms of demonstrating the value of the arts to communities and funders, accounting for the use of public funds, and designing policy interventions.

-The arts (broadly defined) result in three types of value: Economic, Social and Intrinsic.

-The proposed M&E Framework identified five cultural value themes and linked them to indicators that could be used by arts organisations to demonstrate these kinds of value.

-It was shown how the Framework could be applied to a sample of projects funded under the Mzansi’s Golden Economy initiative.



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- Participants of the Cultural Observatory Workshop, held in Johannesburg, February 2016; and
- Participants of “The Value of Arts” conference which took place in Paris, France on the 7th and 8th of March 2016 organised by IETM (International Network for Contemporary Performing Arts), the French Ministry of Culture and Communication and the Ministry of Culture, Republic of Croatia.



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1. Study goals and research methods

This study was commissioned by the South African Department of Arts and Culture (DAC), through the national Cultural Observatory. The aim is to produce a framework for the monitoring and evaluation (M&E) of arts, culture and heritage projects funded under the Mzansi's Golden Economy (MGE) programme.

Methods used to develop the M&E Framework included:

- A review of the theory of cultural value, international best-practice, and existing South African research on cultural valuations and valuation methods;
- The application of the Framework to a sample of projects funded under DAC's "Mzansi's Golden Economy" initiative within the various funding categories;
- A workshop with stakeholders, held in Johannesburg in February 2016, at which the Framework was presented and discussed, and feedback was incorporated; and
- Discussions at a workshop on "The Value of Arts" which took place in Paris, in March 2016.

2. Why Evaluate? The importance of M&E to DAC and cultural industry stakeholders

Monitoring and evaluation are both management tools. However, there are a number of differences between them. Monitoring is more about tracking progress over the short to medium term. While it is important to show progress towards goals or outcomes, monitoring does not evaluate the project in terms of achieving the stated outcomes or goals. Evaluation often occurs at the end of a project (although data can be collected throughout) and makes a judgement (assessment) on the success of the project in achieving the stated goals.

Monitoring and Evaluation of the projects that DAC funds is important to DAC for two reasons:

- In order to allocate limited funds to those projects that are best aligned with the goals of DAC itself and those that are most likely to lead to the achievement of the stated aims of the project; and
- To provide data that DAC can use to report on its own activities.

However, without buy-in from other stakeholders, including artists and producers of culture, arts managers, and civil society, M&E becomes an expensive enforcement of unwelcome "policing". *Adapting the Wheel: Cultural Policies for Africa* (2010), makes this point, emphasising that part of any M&E Framework should be partnerships and collaborative programmes, linked to capacity-building for all stakeholders. However, for this to occur, artists, and arts and cultural events managers, need to be convinced of the value of M&E to their goals too.



At the level of an arts organisation, M&E can be used to:

- Evaluate marketing strategies;
- Help funders (public and private) to understand the project's goals;
- Demonstrate accountable use of public and private funds;
- Engage stakeholders (artists, audiences, funders);
- Demonstrate the value of the arts to communities and funders;
- Advocate for funding (GCA and NASAA, 2007).

Much of the literature, toolkits and guidelines for M&E in the cultural sector address national level studies to evaluate the effectiveness of the implementation of cultural policies, rather than individual project-level studies. However, M&E is part of a cyclical process (including mapping of the CCIs, planning, policy creation or amendment, monitoring and evaluation). As such, in order for M&E of individual, publically funded projects to effectively feed into this national-level cycle, it needs to be aligned with national policy goals, and the values and indicators that are developed need to feed into national-level M&E.

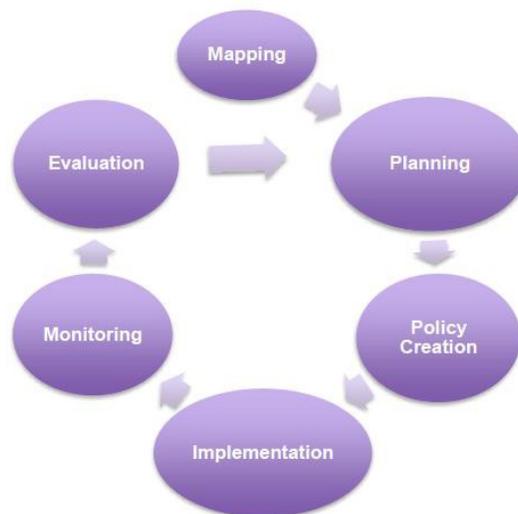


Figure 1: The links between Monitoring and Evaluation and National Cultural Policy
(Source: *Implementing, Monitoring and Evaluating Cultural Policies: Pacific Toolkit*, 2012)



The South African Department of Arts and Culture (DAC) funds a wide variety of arts, culture and heritage initiatives under the Mzansi's Golden Economy (MGE) programme. MGE objectives are:

- To stimulate demand
- Audience development and consumption
- Building heritage resources
- Information gathering
- Human capital development
- Developing cultural entrepreneurs (Mzansi's Golden Economy (MGE) Guidelines: Criteria, Eligibility, Processes & Systems 2015/2016 – 2016/2017 version 1.0).

Eligible projects are divided into four categories, some with sub-categories:

- Cultural Events
 - Annual Live Events for Young Artists
 - National Flagship Project
 - Provincial Flagship Projects
- Touring Ventures & Market Access
 - Digital and Social Media Platforms Domains
 - Touring Ventures: DAC Institutions
- Public Art Programme
- Miscellaneous Arts Project

The focus and expected impacts are somewhat different for each category, and there are two application processes (one for proposals of R100 000 or less, and one for more than this). Criteria for selection include administrative capacity and co-financing, and the following components:

- Creativity (artistic quality, vision, distinctiveness);
- Job creation and economic development (jobs created, involvement of women, youth, people with disabilities; tourism economic growth);
- Market development and exposure;
- Audience development;
- Social cohesion (diversity of programme and audiences; public access).

The impacts of the programme are expected to be:

- Positioning the arts as a valuable contributor to economic growth and job creation;
- Stimulating economic development;
- Promoting sustainability;
- Raising the profile of South Africa as a destination for cultural consumers and increasing tourism (visitor) volume and spending;
- Building the professional capacity of the sector;
- Improving the production and dissemination of local content.



Thus, any M&E Framework would have to take into account (i) the wide variety (type and size) of projects funded under MGE and (ii) the variety of expected impacts. The remainder of this report discusses the development of such an M&E Framework based on a review of current research, international best practice and a review of existing South African experiences. The Framework is then applied to a small sample of projects that received funding under MGE in order to test its applicability.

3. Cultural value: A theoretical and conceptual debate

It is important to be aware of the fact that arts, culture and heritage, including much of the output and work done in the Creative Industries, are not like other kinds of production in that they produce two distinct types of value:

1. Intrinsic values related to the symbolic, artistic nature of the product itself; and
2. Instrumental values related to “economic” values captured in market prices, such as consumer spending and up and down stream supply chain impacts, and sometimes “social” values, such as social cohesion and education.

Intrinsic values are usually difficult to measure in that they cannot be tracked directly in the market by using, for example, prices, spending and Keynesian multipliers to determine “economic” impact. Such values are related to individual emotion and spiritual responses to arts and culture and are related to the notion of artistic quality or excellence (Holden and Balta, 2012). These non-market values are often difficult or impossible to measure in monetary terms, but may be just as, if not more important, than instrumental values in demonstrating the importance of the arts and in justifying public support (Snowball, 2011).

Throsby (1999, 2001) first introduced the idea of “cultural capital” in economics and it has since become an important concept in the understanding and articulation of intrinsic value. He defines cultural capital as a way of “representing culture which enables both tangible and intangible manifestations of culture to be articulated as long-lasting stores of value and providers of benefits for both individuals and groups” (Throsby, 2001:44). Just like other forms of capital, failure to invest in maintenance of existing capital, and innovations that add to it, will result in depreciating value. Hutter and Schusterman (2006) suggest various types of intrinsic cultural value including: self-expression, communication, the expression of a moral or religious vision, entertainment, protest against (and a stimulator of debate about) societal norms and values, and aesthetic values.

Instrumental values associated with the cultural industries are those most often thought of as “economic”, such as job creation, economic growth or impact, tourism development, and innovations



leading to commercialisation and profit. Such values are much easier to quantify, but are not unique to the cultural or creative sector. Using only these methods to demonstrate value may thus not provide as strong an argument for the subsidy of the creative sector as do the public good benefits associated with intrinsic values (Snowball, 2008; 2011; Collins and Snowball, 2014). As Seaman (1987) points out, “Arts proponents are involved in a dangerous game when they resort to impact studies. In a sense, they are choosing to play one of their weakest cards, while holding back their aces.”

Bohm and Land (2008) track the rise in interest of a new set of public instrumental values associated with arts and culture: “Creativity and innovation; Education, training, skills and employability, Social inclusion and community cohesion and (linked to this last category) Human and social capital”. These are also non-market values that can, perhaps indirectly, lead to economic growth, job creation and increased productivity. While not unproblematic to measure, such values are easier to track (using for example, sets of cultural indicators) than the purely intrinsic values. Bohm and Land (2008) trace an interesting shift in the UK government discourse on the value of culture from the easily quantifiable, purely “economic” indicators of cultural value towards a broader conception of value that includes the non-market, but still instrumental, values mentioned above. *Adapting the Wheel: Cultural Policies for Africa* (2010) lists one of the debates around cultural policy as drawing the distinction between subsidy or investment in the arts: “On what basis should public funding be provided?” The answer to this question will shape both the goals and valuation methods used in M&E.

While still instrumental values, some of these ideas do fit in with views on the social or communal nature of cultural value. Many of the problems associated with the valuation of cultural goods are very much the product of society rather than the individual (Klamer, 2003, Throsby, 2003). Similarly, communitarian theory, developed as a way of explaining the value of leisure activities in sociology, values participatory leisure activities, or “focal practices”, like the arts, very highly because of the social networks and “shared meanings” they create, not because of the individual utility they provide, which, in any case, is meaningless outside of its social context (Arai and Pedlar 2003). Linked to the idea of the arts as a way of stimulating debate and challenging the status quo, communitarians believe that it is the argument about shared values and goals which such participatory leisure enables and which are so important in developing the “social self” needed for a healthy society.

Nevertheless, the strong case that was being made for the measurement and use of intrinsic cultural values, alongside instrumental values, as justification for public funding (see for example, Bakhshi et al. 2009, “*Measuring Intrinsic Value: How to stop worrying and love economics*”) has receded into the background somewhat. Holden and Balta (2012) argue that this is because, in the wake of the 2007/8 financial crisis a “new instrumentalism” has emerged in cultural policy debates, in which the case for public funding for the arts must once again be made primarily on the basis of their economic impacts.



However, given the importance of a wide variety of cultural values articulated in South African cultural policy, particularly with regard to social cohesion, the development of the M&E Framework sought to incorporate both instrumental (economic and social) as well as intrinsic values.

Recent research on cultural value has been moving away from the intrinsic/instrumental dichotomy (Crossick and Kaszynska, 2014), just as Peterson’s work (1992; 2005) on cultural omnivores shifted the debate away from “high” versus “low” or “popular” versus “elitist” culture. Holden (2009) proposes a “value triangle” approach incorporating intrinsic, instrumental and what he refers to as institutional value. The latter can also be understood in terms of the social or community values of culture discussed previously. Based on the preceding literature, the following conceptual framework for understanding cultural value is proposed. However, as Holden (2009) also emphasises, these values are not discreet (there may be an overlap between the categories) or hierarchical (one is not necessarily more important than the other). Depending on the particular aims of the arts organisation and the kinds of value they are trying to demonstrate to their funders, different value indicators and valuation methods might be chosen.

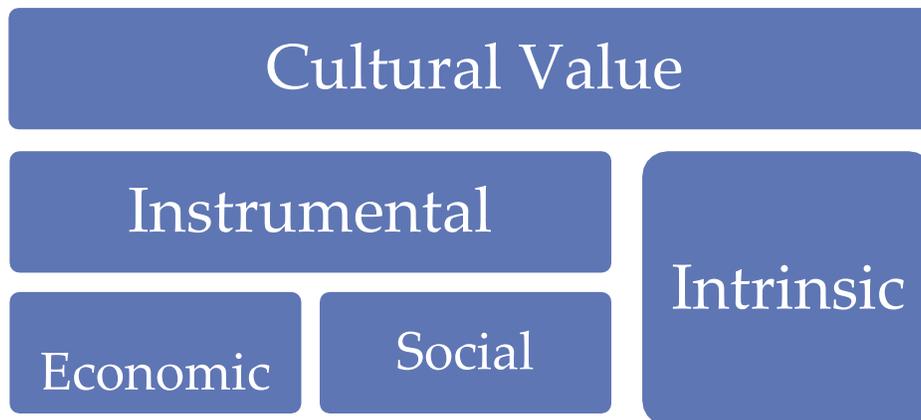


Figure 2: A conceptual framework for cultural value

Intrinsic values are those related to the individual, personal response to arts and culture. They are not always measurable, highly subjective, and information that is gathered about this value is likely to be qualitative and based on the opinions and experiences of audiences, critics or reviewers and other artists.



Table 1: Characteristics and Examples of Cultural Value

Instrumental values		Intrinsic values
Economic	Social	
Characteristics: Measurable, objective, quantitative	Characteristics: Measurable, objective & subjective, quantitative & qualitative	Characteristics: Difficult to measure, subjective, qualitative
Economic growth & regional development	Social cohesion/trust/inclusiveness	Enlightenment
Job creation & employment	Skills & education	Self-discovery
Opportunities for creative entrepreneurs	Infrastructure development	Delight/Joy/Discomfort
International trade	Health & Wellbeing	Debate
Data from: Market data on sales, prices, costs, spending; employment (full-time; part-time; contract; demographics); local/established businesses; stall-holders; service providers	Data from: Social indicators, audience surveys; participation; demographics; volunteers; community partners; minutes of meetings	Data from: audiences, critics, artists, photographs, journals; quality of life

Under instrumental values, there are two distinct categories: Economic values and Social values. Economic values are measurable, objective and usually quantitative. Data can be collected from market sources, such as sales, prices, project costs and audience spending.

Social values refer to the non-market benefits to society, such as building social cohesion and recognising diversity, improving skills and education (human capital) and improving health and wellbeing. While indicators in this category are measurable, they may not always be quantitative (although they can be quantified). Data can be collected from audiences, but also from social indicators on, for example, cultural diversity, educational outcomes, and health.

Holden (2009) emphasises that, for public (government) funders, it is the instrumental values of culture that can be used most effectively to justify spending on arts and culture. For individuals and artists, however, subjective intrinsic values are of most importance: “When I sit in a darkened auditorium listening to, say, Benjamin Britten, my feelings are awakened and I think, ‘this is lovely, it’s amazing, it’s astonishing’. I don’t sit there thinking, ‘I’m so glad this performance is driving business prosperity and helping to meet tourism targets’” (Holden, 2009:452).

Since governments and some private funders are more concerned with the social and public benefits of the arts, rather than the subjective individual experience, they naturally tend to focus on the more easily measurable, instrumental values. However, this is not to say that the intrinsic value is any less important. Indeed, as Holden (2009) points out, these values are complementary and are often produced by the same cultural output. For example, a school visit to a museum may produce individual, emotional responses (intrinsic), improve education and understanding of other cultures (Instrumental: social) and result in ticket sales and spending at the museum shop (Instrumental: economic). Different events/organisations will put more or less emphasis on each value category and, depending on the intended purpose, different



research reports will focus more or less on the different kinds of value. The Box below gives examples of three studies that focused on different kinds of value: Experimental studies in measuring intrinsic impact in the USA; the measurement of instrumental economic and social values at the South African National Arts Festival; and the measurement of instrumental economic values in a study of the South African film and television industry.

There are ongoing international debates on the place, and value, of arts and culture in wider development goals. For example, arts and culture was mostly absent from the United Nations Millennium Development Goals. In discussions leading to the adoption of the Sustainable Development Goals, various advocacy groups made a strong case for the explicit inclusion of culture. The United Cities and Local Governments (UCLG) is an international organisation of 64 members, currently chaired by the City of Barcelona, and vice-chaired by the cities of Buenos Aires, Lille, Montreal and Stockholm. The mission of the Committee for 2011-2013 was “to promote culture as the fourth pillar of sustainable development”. The arguments for including culture as a pillar of sustainable development included the economic (growth of cultural industries, promotion of tourism for regional development, entrepreneurship, job creation), but also encompassed non-market social and intrinsic values (inter-cultural understanding, tolerance, social cohesion, identity). “Agenda 21” was a global call for the formal recognition of culture as a key part of sustainable development, along with... UNESCO strongly supported the call:

“At a time when the international community is discussing future development goals beyond 2015, all efforts are focused on putting culture at the heart of the global development agenda. Culture, in its manifold expressions ranging from cultural heritage to cultural and creative industries and cultural tourism, is both an enabler and a driver of the economic, social and environmental dimensions of sustainable development. Key areas where culture can play a decisive role in the forthcoming international development agenda have been identified: poverty eradication, quality education, sustainable environmental management, sustainable cities and social cohesion and inclusion” (UNESCO, 2015).

The SDGs were ratified in September 2015, but the 17 goals did not explicitly include culture. However, some of goals, such as Goal 4 “Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all” and Goal 16: “Promote peaceful and inclusive societies for sustainable development”, have clear linkages to the economic, social and intrinsic values of culture.

Joffe (2013) strongly supports including the role of culture in sustainable development in Africa: “Strengthening and promoting the cultural and creative economy in Africa is important for two fundamental reasons: The first relates to development in all its dimensions – human, social, ecological and economic; and the second, to growth”.



In addition to the financial or economic impacts of culture, that can be measured using economic data (such as employment levels, value added and economic impact) there are also indirect positive externalities (also called ‘spillovers’) from cultural production that increase the productivity of other parts of the economy and society. A recent report (CCI Spillovers Report, 2015) on spillovers from the cultural industries in Europe identified three broad categories: Knowledge spillovers, Industry spillovers, and Network spillovers (Figure 3).

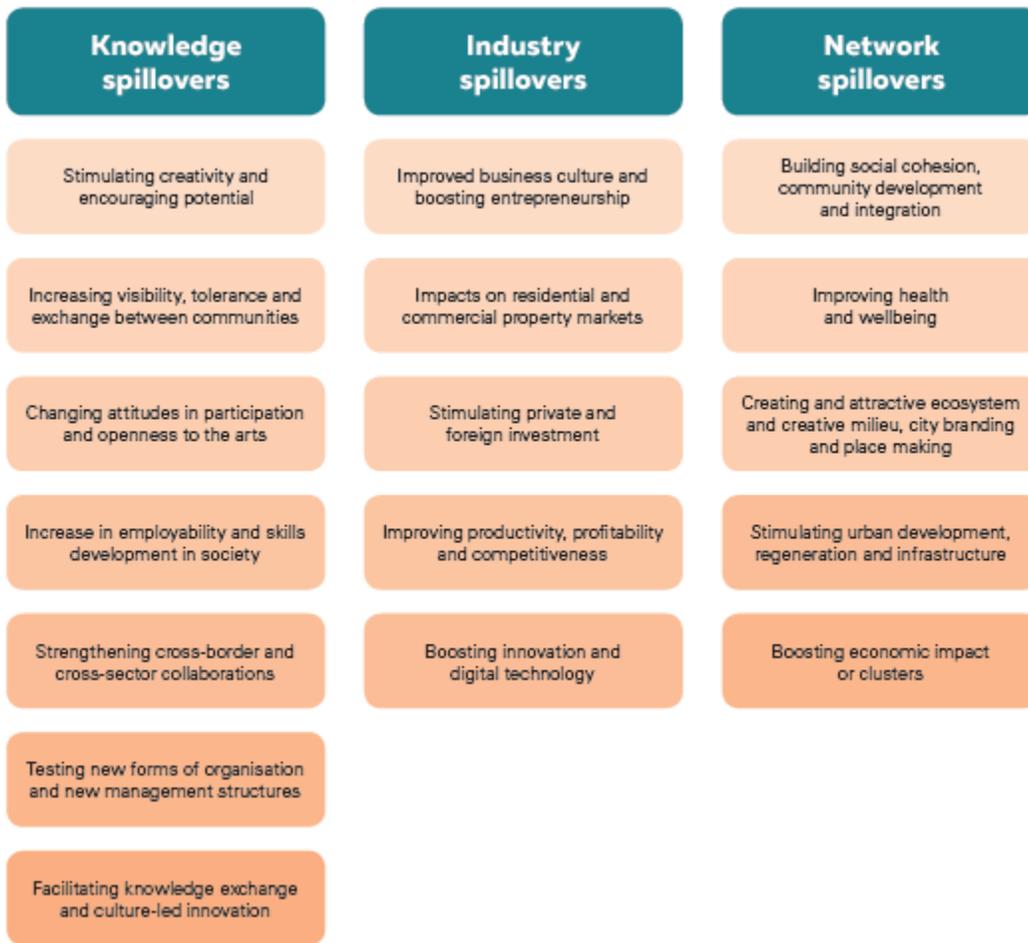


Figure 3: Spillovers from the Cultural and Creative Industries (Source: CCI Spillovers Report, 2015)

Knowledge spillovers refer to the “new ideas, innovations and processes” that the cultural industries produce and that can then also spread to other parts of the economy. Often, the arts organisations that develop such new ways of doing things are not directly rewarded for this innovation (causing market failure). Such “public goods” are one of the most powerful arguments in favour of government funding for the arts.

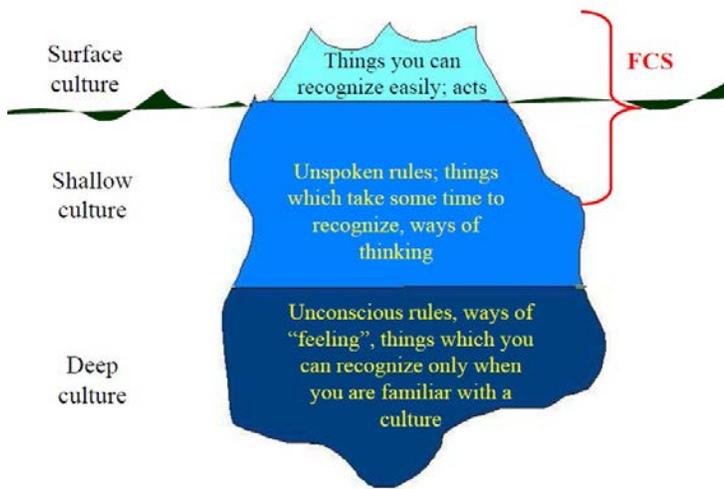
Industry spillovers refer to the “vertical value chain and horizontal cross-sector benefits” of having an active and growing cultural and creative sector. Part of these benefits (which overlap somewhat with



knowledge spillovers) refer to innovation and entrepreneurship, but they also relate to economic ‘multiplier’ effects, such as an increase in investment and impact on property prices.

Network spillovers relate to the “impacts and outcomes to the economy and society that spill over from the presence of a high density of arts and/or creative industries in a specific location (such as a cluster or cultural quarter)”. Again, there are some overlaps with other spillover categories, but these are more focused on location and connect to the developing field of ‘cultural economic geography’.. While some these impacts can be measured using market prices and gross geographic product, they also include non-market social benefits, such as health and well-being, and social cohesion.

However, the fact remains that not all the aspects of cultural value can be measured. The Pacific Toolkit (2012) adapted the “iceberg model of culture” used by the UNESCO Framework for Cultural Statistics (2009) to demonstrate the reach of cultural indicators and statistics (Figure 3)



The “iceberg model” emphasises that any Framework for Cultural Statistics (FCS) will only be able to capture part of the value of culture. “Surface” culture and cultural activities can be easily recognised and measured (for example, the economic values of specific cultural events in the conceptual framework already presented); “Shallow” culture is more difficult to recognise and measure (for example, the social and intrinsic values) and “Deep” culture (linked to some intrinsic values and “culture as a way of life”) cannot be measured at all.

Figure 4: The Iceberg Model of Cultural Value: Nine tenths of culture is below the surface
(Source: UNESCO Framework for Cultural Statistics, 2009)



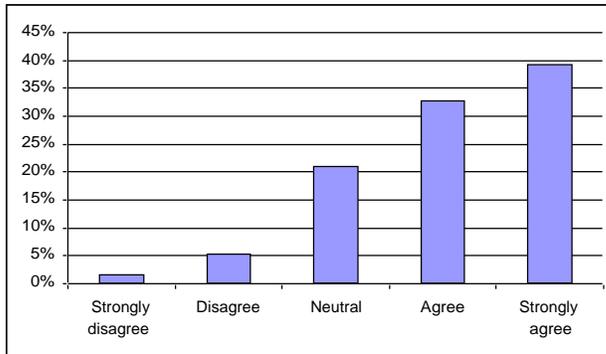
Box 1: Examples of measuring the intrinsic, economic and social values of culture

Measuring the intrinsic impacts of arts attendance (Brown and Novak-Leonard, 2013)

The article develops a set of indicators to measure and compare the individual, emotional responses to arts and culture. The indicators can also measure changes in attitude and perceptions of personal transformation by asking audiences to respond to specific question using a scale (not at all, a little, somewhat, very much). For example, questions included, “To what degree were you absorbed by the performance?”; “To what extent did the performance cause you to reflect on your own opinions or beliefs?”; “How much did the performance leave you feeling uplifted or inspired in a spiritual sense?”. The authors conclude that, while measuring intrinsic impacts still has methodological challenges, it can play a potentially important role in the decision-making of both arts organisations and policy makers.

The Economic and Social Impact of the National Arts Festival (Snowball and Antrobus, 2013)

The study used an extensive audience survey to collect information on spending patterns and amounts as well as opinions and experiences. The economic impact of the Festival on the local Grahamstown economy was calculated to be R91m in 2013. The survey also asked festival-goers to respond to statements (strongly agree, agree, neutral, disagree, strongly disagree) measuring some of the social impacts of the event. For example, “The Festival is an event where people from different cultures and backgrounds can meet and talk together”, which was designed as a social cohesion indicator. The figure below shows the responses.



The Festival is an event where people from different cultures and backgrounds can meet and talk together.

Subsidies to Creative Industries: The case of South Africa's film and television sector (Collins and Snowball, 2015)

The study uses financial data on film and TV productions subsidised by the Department of Trade and Industry (DTI) to calculate the economic impact and Full Time Equivalent (FTE) jobs created by subsidized projects from 2009 – 2012. An interesting feature of the film and television rebate scheme is that, while there are some restrictions on the production types that qualify, there is no cultural value or quality indicator needed. Findings showed that the economic impact of subsidized productions in the study period was more than R2.2 billion per year (in 2010 prices). Subsidised projects created 5 700 direct, and 10 000 indirect, FTE jobs per year. The study also commented on the demographics of those employed in the industry and the slow progress being made towards transformation, particularly in management and “creative” jobs.



Nevertheless, using the sample of arts, culture and heritage projects and events funded under the DAC Mzansi’s Golden Economy initiative, it can be seen that a wide variety of economic, social and intrinsic values are expressed in the reports (which included application forms and final reports submitted at the end of the project. While not all the aims of the projects were linked to supporting indicators that demonstrated the achievement of the goals, the different categories of value were recognised.

Table 2: Concepts and indicators used to express value in a sample of DAC reports

Instrumental values		Intrinsic values
Economic	Social	
<u>Employment:</u> Numbers; demographics; experience; full-time; contract; volunteers	<u>Audience:</u> participation; attendance; demographics; community; development; exposure	<u>Emotional:</u> celebrate; fun; interesting; enjoy; understand; energy; expression
<u>Growth:</u> SMMEs; local service providers and businesses; traders; stalls, sustainable income; productivity; promotion; market access; sales	<u>Education:</u> Learners, parents; mentors; skills; experiences; capacity building	<u>Quality:</u> sold-out; successful; can easily compete; reviews
	<u>Communities:</u> Urban; rural; disabilities; strategic partners; networks; public; social cohesion; multi-cultural; unity	<u>Artists:</u> profile; exposure; skill; talent

Each report provided information in each of the cultural value categories, but placed different emphases on them. For example, a craft development project (Miscellaneous Arts Projects), focusing on youth and the disabled, put great emphasis on the social values of the project (skills development, education, social inclusion), some emphasis on artistic and cultural intrinsic values (experience, quality, enjoyment) and less on economic values (marketing of products, employment of mentors). Compare this to a large festival or event that focused much more on aspects such as tourism (economic) and audience development (social). An effective M&E Framework needs to be adaptable enough to take into account the different goals and characteristics of events and projects, while at the same time giving guidance on the kinds of indicators that can be used to demonstrate the cultural value categories being targeted. The next section of the report reviews some of the available methods for measuring cultural value.

4. Measuring Cultural Value

Depending on which kinds of value are being focused on, there are a wide variety of potential ways for measuring the contribution of arts, culture and heritage to society. As Joffe (2013) points out, any framework for cultural statistics need to take into account the purpose for which they are being collected, and the kinds of value that they will need to express. This section of the report provides a brief overview



of some of main methods related to measuring the economic, social and intrinsic values of culture, and examples of their use.

4.1 Economic values

Economic impact studies attempt to answer the question, “If the event had not taken place, what would the loss of revenue to the impact area have been?” In other words, they attempt to calculate all the additional economic activity that takes place in the impact area as a result of the event being studied. Financial impact of, for example, an arts festival, can be divided into the direct impact of the event and the indirect or induced impact, the latter being a reflection of the interdependencies within the economy leading to multiplier effects (Vogelsong et al. 2001, Seaman, 2003). These sorts of studies concentrate on the private good aspect of the arts, captured by market transactions, rather than the social or intrinsic benefits.

Methods for measuring economic values are well documented and standardised. The UNESCO (2012) guidelines on *Measuring the Economic Contribution of Cultural Industries* carefully documents the available methods, what they measure and the policy relevance, analysis and interpretation of each measurement type (see Table 3).

The advantages of economic studies are that they provide quantitative data based on market prices. They provide one monetary figure that is easy to communicate and use in public funding advocacy (a monetary figure that fits into a budget). Economic impact results may also be useful in comparing the “return on investment” of public funds and in making choices between various projects when funds are limited.

Table 3: Basic model for measuring the economic contribution of cultural industries

Method	Measures	Policy relevance, analysis and interpretation
Gross value added	Gross value added/GDP contribution of cultural industries or sub-sectors; or GDP contribution of sub-sectors relative to each other (distribution).	Can be used for measuring economic value and level of activity in cultural industries; importance of cultural industries in generation of economic macro aggregates; identifying type of relationship between cultural industries and the overall economic and cultural industries’ development models; and for identifying structural changes.
Turnover	Turnover of cultural industries or sub-sectors (absolute or relative to each other)	Can be used for indication of economic value (contribution) and level of activity in cultural industries; indication of environment for cultural industries, market penetration and economic strength.
Employment	Contribution to total employment, employment by sub-sector; volume of self-employment; productivity	Can be used for measuring the importance of cultural employment in overall employment, potential for job creation etc.
Business activity	Stock of businesses; distribution by sub-sector; start-ups and mortality.	Can be used as indicator for cultural diversity and level of supply of cultural products and services; for measuring turbulence in enterprise sub-sectors; for modelling cultural industries support programmes; for indication of business structure, concentration or



		diversity; for analysis similarities and differences between cultural industries and the rest of the economy.
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(Source: UNESCO, 2012: 89)

However, the method is not as “scientific” and objective as it seems, since any study inevitably has to make some assumptions, and is thus open to many forms of methodological bias. The figures themselves are open to misrepresentation. For example, economic impact results are sensitive to the defined “impact area”. A statement of a particular figure, without referring to the impact area that it applies to, can give the impression of a much larger impact than actually occurred. Financial impact by itself is not a very effective argument for public funding for arts and culture. All industries have some financial impact. The special values of arts, culture and heritage that are not captured in the market and which provide “public goods” can also be used to make a strong case for government support. Finally, economic impact studies treat the cultural sector in the same way as any other sector and do not take into account the aims of the cultural workers or their products. This has sometimes led to the somewhat hostile relationship between arts organisations and economists (Snowball, 2008).

“Indeed, there are so many different types of festivals that one might consider whether it might be better to have several statistical models depending on the objectives of the event and the nature of activities” (UNESCO, 2015 *Framework for Festival Statistics*).

Economic impact studies have been used extensively to measure the impact of cultural events in South Africa (see Table 4 for an examples of some studies). The recently published UNESCO *Framework for Festival Statistics: Key concepts and current practices* (2015) used South Africa as a case study partly because of the abundance of research already done on the economic

(and social) impact of South African festivals and events.

Economic impact studies work well for events or organisations that attract a large number of visitors from outside the impact area, and when such visitors spend on accommodation, food, tickets over an extended period of time. Economic impact studies do not work well when the event or organisation benefits mostly local residents (who do not bring “new” money into the region), which occur over a short time-period, or which target groups who do not have much spending power (such as youth, elderly, poor).

A recent methodological innovation is the use of macroeconomic data to measure the economic impact of an event over time. Rather than basing economic impact figures on visitor and producer surveys that collect information about their spending, new studies use regional-level data on employment and growth to measure the economic effects of an event after it has taken place. For example, Srakar, et al. (2016) use statistical time-series analysis to show the impact of the Venice Carnival on the growth and employment of the region over time. Their results clearly show that hosting the Carnival can be associated with more tourist arrivals, overnight stays, and increased employment. While they acknowledge that regional-level



data is sometimes difficult to find, they argue that these *ex-post* studies are far more reliable indicators of economic impact than those based on visitor and producer spending data.

Table 4: Examples of recent Economic Impact studies conducted in South Africa

Authors	Title	Year	Publication
Van Zyl, C.	Optimum market-positioning models for South African arts festival scenarios	2005	Dissertation. University of South Africa.
Saayman, M. and Saayman, A.	Does the location of arts festivals matter for the economic impact?	2006	Papers in Regional Science
Kruger, M., Saayman, A. and Saayman, M.	Socio-demographic and behavioural determinants of visitors at the Klein Karoo National Arts Festival.	2009	Event Management
Kruger, M., Saayman, A. and Saayman, M.	First-time versus Repeat Visitors: Is there a difference? The Case of Volksblad Arts Festival.	2010	Acta Academica
Saayman, M, and Rossouw, R.	The significance of festivals to regional economies: measuring the economic value of the Grahamstown National Arts Festival in South Africa.	2011	Tourism Economics
Snowball, J.	Are arts events a good way of augmenting the economic impact of sport? The case of the 2010 Soccer World Cup and the National Arts Festival in South Africa.	2013	International Journal of Arts Management
Collins, A. and Snowball, J.	Transformation, Job Creation and Subsidies to Creative Industries: The Case of South Africa's Film and Television Sector	2015	International Journal of Cultural Policy
Snowball, J. and Antrobus, G.	The National Arts Festival Festino Survey and Economic Impact Analysis	2015	Report commissioned by the National Arts Festival.
Snowball, J. and Keeton, G.	The current economic impact and future expansion potential of the.	2015	Report commissioned by Buyel'Ekhaya Pan-African Music Festival
Snowball, J. and Antrobus, G.	Festino Survey and economic impact of the Absa Klein Karoo Nationale Kunstefees (KKNK)	2015	Report commissioned by KKNK
Snowball, J. and Antrobus G.	Festino Profile and Economic Impact of the Cape Town Fringe Festival.	2015	Report commissioned by the National Arts Festival



Total conservative economic impact (in Rand)

A multiplier of 1.1 and a less conservative 1.4 Three events stand out with the largest impacts: the GNAF, the MACF and the CTIJF. In contrast, the KDF and the GC had the smallest impact, owing to the fact that mostly locals participated in these events.

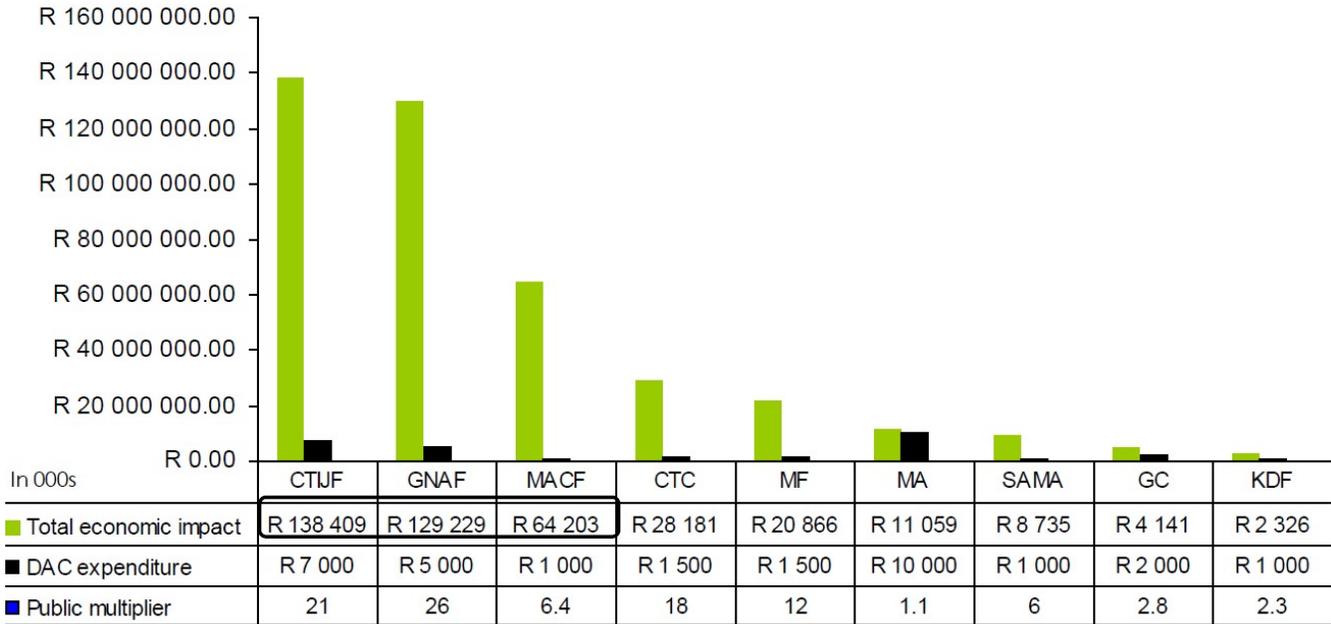


Figure 5: The Economic Impact of a Sample of South African ACH events (Source: Octagon, 2014)

An M&E study conducted by Octagon consultants (2014) used a standardised questionnaire to compare the economic impact of a number of different cultural events funded by DAC. They included large, national festivals, smaller regional festivals, a music awards event and a carnival. As shown in Figure 5, economic impact was shown to be much greater for larger, longer events (such as the Cape Town International Jazz Festival and the Grahamstown National Arts Festival) than for smaller, shorter events that attracted fewer people from outside the region (such as the SA Music Awards and Gauteng Carnival). Octagon’s recommendations included not using a standardised questionnaire or valuation method, given the different types, sizes and purposes of events. Rather, they suggest that an M&E Framework should be able to adapt to the particular purpose and nature of each event. This accords with the UNESCO (2015) *Framework for Festival Statistics* that concludes that, even within the narrow category of the economic impact of festivals, a differentiated approach is needed.

As Joffe (2013) points out, an additional challenge for measuring the value of culture in many African countries is that a large proportion of trade in the sector takes place in the informal economy, which is mostly unregulated and untaxed, and therefore difficult to measure using market-based data.



4.2 Measuring Social and Intrinsic Values

As Bakhshi et al. pointed out in 2009, there are recognised and carefully tested methods for measuring the social and intrinsic values of culture. A number of ways exist in which the value of externalities provided by public goods may be measured. The travel cost method measures the access costs of users to a specific site or event, i.e. what consumers are willing to pay in travel costs in order to attend, for example, an arts festival (Mundy and McLean 1998:292). The hedonic price method assumes that households “migrate into or out of geographic regions based on tradeoffs between quality of life in those regions and differences in housing prices” (Ready et al. 1997:439) i.e. what consumers are willing to pay in increased housing prices (or decreased wages) in order to live in an area that had certain amenities, e.g. an arts festival. The contingent valuation (CV) method asks respondents directly what they would be willing to pay, or willing to accept (WTA), in a hypothetical market situation to conserve or expand some public good (Ready et al. 1997:439). The CV method also includes stated choice or choice experiment surveys, which ask respondents to choose between various scenarios in which the levels of the attributes making up the good are varied. specifically Contingent Valuation, also known as “willingness to pay” (WTP) studies. WTP studies use surveys to elicit values, contingent on a specific scenario, for cultural goods. They have been applied to a wide variety of cases including arts and theatre, museums, historical sites and heritage, broadcasting and libraries (Snowball, 2008). Such studies have been applied at a national level as well as in the case of specific events. To give an example of how the method works, Box 2 summarises two studies: One of the earliest and most famous national studies done in Australia (Throsby and Withers, 1984) and an event-specific study on two South African arts festivals (Snowball, 2005).



Box 2: Measuring the Social and Intrinsic Benefits of the Arts

What Price Culture? (Throsby and Withers, 1984)

The study was based on a survey of a sample of adults in Australia to determine participation levels, perceptions about the kinds of public benefits the arts provide, and willingness to pay from their taxes for public support of the arts. Findings showed that participation varied depending on the genre. For example, just over half of the respondents had been to a live music or artistic performance in the year before the survey, but only about 10% had been to opera or ballet. They also found that a greater percentage of people said they were interested in arts and culture, and would consume it through media (such as TV or radio) rather than attend live performances.

In terms of social benefits, people were asked to respond (from strongly agree to strongly disagree) to statements such as “The success of Australian painters, singers, actors etc. gives people a sense of pride in Australian achievement” (95% agreed or strongly agreed); and “The arts help us understand our own country better” (85% agreed or strongly agreed). The results of the willingness to pay study showed that the average willingness to pay of Australians exceeded the levels of government support at the time. The authors conclude that, “The notion of arts as a luxury and as only an elite pleasure foisted on an unknowing or resentful public is simply wrong”.

Art for the masses? Justification for the public support of the arts in developing countries – two art festivals in South Africa (Snowball, 2005)

The study used the WTP method to evaluate the intrinsic values of local populations in two festival towns: The National Arts Festival in Grahamstown, and the Klein Karoo Nationale Kunstefees in Oudtshoorn. Telephone interviews with a stratified sample of people from all race groups and income areas asked what they were willing to pay in increased municipal rates to avoid a 25% reduction in the size of their festivals.

Results showed that, although WTP amounts were lower, the percentage of households who were willing to pay to support their festival was much the same in the higher income, mainly white part of the towns (78% in Grahamstown and 66% in Oudtshoorn) and the lower income, mainly black African or coloured part of the towns (80% in Grahamstown and 65% in Oudtshoorn). Reasons for being willing to pay included both intrinsic (entertainment, excitement, support for “gifted” artists, cultural pride) and instrumental values (economic growth, tourism and job creation).



Despite its popularity and growing application and acceptance, the WTP method was prone to many forms of potential bias and was, to some extent, superseded by conjoint analysis (also called “choice experiments”). Choice experiments divide up the cultural good or scenario being valued into its component parts (attributes) and allocate them different “levels”. Rather than being asked directly what their willingness to pay for a particular scenario is, choice experiments ask respondents to indicate their preference for a particular “bundle” of goods, each associated with a specific “price”. For example, rather than asking how much they would be willing to pay in increased taxes, to support arts and culture in general, choice experiments would break “arts and culture” down into specific attributes (such as music, theatre, literature, film and TV, heritage etc.) and give an associated change in each attribute (such as a specific percentage or number increase in projects funded), associated with a specific rise in taxes (in a Rand amount). Statistical analysis could then be used to place a value on the change in each specific attribute.

While choice experiments were said to solve many of the problems associated with WTP studies, they also had problems of their own. In particular, results were sensitive to the choice of attributes and levels and the complexity of the choices respondents were asked to make which could lead to inconsistency and cognitive overload (Hanley et al, 2001). In developing countries, both methods have their problems. For WTP, use amongst low-income groups is limited because a lack of ability-to-pay interferes with the willingness-to-pay answers. For choice experiments, the complex trade-offs required rely on a relatively high level of education, especially in numeracy, in order to explain how the questions work.

A new, and potentially very promising development, is in the field of Quality of Life (QoL) studies. This method of evaluation asks respondents to score their satisfaction with their overall quality of life and with various aspects of it (health, relationships, safety, community etc.). Information, such as their demographic variables (age, income, race, gender) and activities, such as work, participation in community projects, arts and arts related activities, politics and leisure, is then also collected. Using statistical techniques, the impacts of these variables on their self-rated quality of life (or happiness) can be determined.

Michalos and Kahle (2008) argue that quality of life studies are a potentially important way to measure the intrinsic impact of the arts. However, they also point out that the methods for determining the impact of arts and culture on individual wellbeing are still developing and that they are far from simple. Michalos and Kahle (2008) obtained data on life satisfaction, demographic variables and a wide variety of arts related activities and participation from a sample of more than 1000 respondents in British Columbia. Five indices were created to explain the motives for arts consumption: health enhancement, self-development, community building, arts as an end in themselves and spirit building. These were assessed against various quality of life indicators. Findings showed that, when controlling for other important variables, such as financial security, arts and arts related activities had a positive, but relatively small impact on quality of life. The authors conclude that, “it would be a mistake to think of ‘the arts’ or



‘arts related activities’ as delivering a homogenous set of causes and effects’ (Michalos and Kahle, 2008:248), and that careful design of measures and indicators, capable of capturing a wide variety of different values, is needed.

Steiner et al. (2015) studied the impact on the quality of life of people in European cities that had hosted the European Capital of Culture event. Their findings show that, despite the increase in economic growth and employment that result, people living in cities hosting the event experienced a *decrease* in life satisfaction during the host year. This was particularly the case for lower income and education groups. Their explanation is that international tourist events are often associated with rising prices, increased congestion and crime. Lower income and education groups are less likely to attend any of the cultural events (thus missing out on the positive effects), and are more likely to be affected by rising prices and crime (thus experiencing more of the negative effects).

The small number of other quality of life studies related to the arts also produced somewhat mixed results. In a review of studies on cultural participation and quality of life, Galloway (2006) reports that, while more cultural participation is often (weakly) associated with improvements in wellbeing, some kinds of activities are not significant (no effect) or may even be negative. Much depends on the sample of respondents, the kinds of ‘arts’ activities and participation included, and the quality of life measure used. Thus, while quality of life studies are a promising method for quantifying intrinsic impact, much research is still needed in this area.

5. The Development of Cultural Indicators

In order to operationalise the conceptual framework of cultural value, and to produce studies that are reliable and comparable, several countries have tried to define “cultural indicators” that can be used for setting targets, monitoring changes over time, and evaluating the effectiveness of various cultural policy strategies. While these are often used on a national level, rather than with individual arts organisations in mind, they can still be used as a framework for articulating cultural value. It is also important that national-level priorities and goals should be aligned with the indicators chosen for individual arts and culture projects if a clear motivation for public funding is to be made.

5.1 International Examples of Cultural Indicators

According to a review of international literature and guidelines, good indicators should be:

- Relevant to the system about which information is sought;
- Easy to interpret, even by non-experts;
- Reliable enough to be used in making decisions; and
- Based on accessible data (Pacific Toolkit, 2012).

Indicators can be quantitative (How many? How often? How much?) or qualitative (How? Why? When? What?).



Since governments are interested in public and social values, most of the indicators are related to instrumental cultural values. However, in many of them, there is also a growing interest in exploring ways of expressing and measuring intrinsic cultural value. This section reviews some international literature on the development of cultural indicators.

Good cultural indicators, whether at national or organisational level, need to measure changes over time and be readily interpretable as un/favourable changes in relation to identified goals or aims (Hong, 2014). They also need to be useful to both funders and arts organisations. For example, the New Zealand cultural indicators (further discussed below) set out to:

- Demonstrate and reinforce the importance of the cultural sector through regular reporting;
- Provide a benchmark for monitoring changes in the CCIs;
- Provide quality information to government and policy-makers;
- Help to provide a measure of the effectiveness of government policy interventions; and
- To provide links across different sectors (networking) within CCIs themselves (Hong, 2014).

At the level of an arts organisation, indicators can be used to:

- Evaluate marketing strategies;
- Help funders (public and private) to understand the project's goals;
- Demonstrate accountable use of public and private funds;
- Engage stakeholders (artists, audiences, funders);
- Demonstrate the value of the arts to communities and funders;
- Advocate for funding (GCA and NASAA, 2007).

Development of cultural indicators themselves starts with the identification of the general categories of cultural value of most interest. For example, the United Kingdom "Cultural Value" project was established in 2012 as a counter-response to a growing focus on the instrumental value of culture, which was particularly used to demonstrate value in order to motivate for public funding (Crossick and Kaszynska, 2014). Rather than beginning with the more easily quantifiable economic valuations, the Cultural Value project starts with "people's experience of arts and culture, rather than secondary benefits that follow" (2014:123). The aim is to develop a more participatory valuation that also incorporates qualitative data and theory from disciplines other than economics.

The Cultural Value project identifies five broad categories of cultural value:

1. *The reflective individual and the engaged citizen*: reflectiveness, empathy, appreciation of diversity, community engagement, transformative self-knowledge, fostering dialogue and strengthening democratic institutions, but also recognising the power to disrupt, question and challenge;
2. *Economic benefits*: creative industries, job creation and regional growth;



3. *Communities, regeneration and space*: regeneration and development of cities and towns;
4. *Improvements in health and well-being*: physical and mental health, quality of life
5. *Culture, understanding and international relationships*: relationships, trust, trade cultural diplomacy (Crossick and Kaszynska, 2014).

The Cultural Value project takes an open-ended, multidisciplinary approach, recognising, as Holden (2009) does, that the indicators and methods chosen should depend on *why* a particular valuation is taking place. Crossick and Kaszynska (2014:128) question the “belief in a single quantifiable measurement to articulate the importance of arts and culture relative to other activities” and argue instead for a much broader approach in shaping a research agenda for cultural value.

New Zealand developed a set of national cultural indicators within their Cultural Statistics Programme (CSP). The purpose was to track changes to the cultural and creative industries (CCIs), to demonstrate value to government, funders and the public, and to provide information that would be useful to industry stakeholders and organisations themselves (Hong, 2014).

Table 5: New Zealand’s Cultural Indicators

Theme	Outcomes	Indicators
1. Engagement	-New Zealanders engage in arts, culture, heritage events as participants, creators and providers; -There is an environment that supports creativity for all; -All NZ people have access to ACH; -ACH are valued by New Zealanders	-Cultural employment; -Median incomes for creative occupations; -Barriers to creative employment -How often do HHs participate in ACH -HH spending on ACH -Heritage projection -Access to ACH
2. Cultural Identity	-New Zealanders have a strong sense of identity based on heritage & culture; -Diverse cultures are strong, living and valued	-Speakers of various languages -Local TV content -Importance of culture to national identity -National events
3. Diversity	-Growing cultural diversity is freely expressed, respected and valued	-Grants to various ethnic groups -Attendance/participation in ethnic cultural activities - Minority cultural activities
4. Social Cohesion	-Community relations are enhanced by involvement in ACH -NZ shares cultural identity and fosters inclusive society	[Unpopulated]
5. Economic Development	ACH contribute to growing the economy	-Income of CCIs -Value added -CCI proportion of total industry

An important goal was to take into account ethnic diversity of the population and the role that arts, culture and heritage (ACH) played in national identity formation. The indicators were divided into five



themes, each with specific desired goals or outcomes, linked to indicators (see table below). The five themes were Engagement, Cultural Identity, Diversity, Social Cohesion and Economic Development (Hong, 2014). For each theme, desired goals or outcomes were developed, sometimes capturing both intrinsic (engagement, “value”, access) and instrumental (employment, value added, incomes) values.

At the level of city or regional development, there has been an international focus on the “European Capital of Culture” (ECoC) projects. To track changes over time as a result of Liverpool being an ECoC in 2008, event organisers developed a framework and indicators to measure the economic, social and cultural impacts and compared them over three time periods: 2008 (the year of the event); during 2006 – 2008 (in the run-up to the event); and in 2009 (post event). Five themes were identified: Cultural access and participation; Economy and tourism; Cultural vibrancy and sustainability; Image and perceptions; and Governance and delivery process.

Table 6: Tracking cultural indicators over time: The “Culture & Participation” theme in Liverpool

2008	2006 – 2008	2009
A third of audiences were local; 17% from outside the region; 5% international.	10% rise in arts attendance per year.	60% of citizens took part in at least one ECoC event.
Audience socio-economic profile matched the profile of the region.	Higher levels of interest in museums & galleries than in other parts of the country.	14% of citizens said they had “tried something new” in 2008.
Volunteers and other participants reported a range of social and cultural outcomes from their involvement including social interaction, a change to welcome overseas visitor, and the satisfaction of promoting the city’s culture and heritage.	50% rise in visitor figures to largest attractions.	60% of regional residents agreed that there were more cultural activities and opportunities in the region than previously.

(Source: Adapted from *Creating an Impact: Liverpool’s experience as a European Capital of Culture*, 2009)

5.2 A framework for South African cultural indicators to be used in monitoring and evaluation

A natural starting point for the development of a monitoring and evaluation framework for cultural indicators in South Africa are documents outlining the national outcomes and goals of the Department of Arts and Culture (DAC). However, it is clearly recognised that these are likely to be focused on the social and public (that is, instrumental) value of culture and that arts organisations themselves will be focused more on the production of intrinsic values. It is also recognised that each event or project sponsored by DAC will have their own particular goals, as demonstrated above.

Any useful monitoring and evaluation framework would thus have to take into account:

- The stated aims of the project/event/organisation;
- What the expected impacts are; and
- Who is expected to benefit.



The monitoring and evaluation tool would then have to be designed based on the answers to these questions. Note that although DAC funding recipients would doubtless share some aims and impact types, the combination of these are likely to be unique in each case, making direct comparison and the construction of a simplistic scoring mechanism unlikely.

In this context, standardisation is only possible in so far as a range of potential impacts, beneficiaries and indicators can be defined. From this meta-list, a unique evaluation tool could be constructed for each event, aligned with the stated aims of the grant recipient. Issues such as data collection and method of analysis would then need to follow on from this initial phase, with defined reliability and validity checks.

For example, if the stated aim of a project is to develop the business management and planning skills of local artists, specific data to test to what extent this occurred could be collected – perhaps from artists themselves (qualitative), but also in terms of workshops held, business plans developed, financial data etc. It would not be possible to compare this project directly with one whose stated aim was to improve cultural education amongst school children, or a local village festival designed to build social cohesion, or with those of a big international music festival. All it would be possible to determine is to what extent each project fulfilled their stated aims, given the benefits they expected and the beneficiaries they had in mind.

A too-narrow focus on easily measurable market impacts is likely to have the effect of channelling funds to established, big events, with media coverage, who attract tourists and producers from outside the region (since these are likely to have the biggest financial and job creation impacts), and away from equally important, but smaller local events that have primarily non-market impacts. The “vision” of DAC, as set out in the 2015/16 – 2019/20 Strategic Plan is “A dynamic, vibrant and transformed Arts, Culture and Heritage sector, leading nation building through social cohesion and socio-economic inclusion”.

The DAC Strategic Plan identifies five priorities:

- An enabling policy, legislative and regulatory environment: Coherent policies that guide directional planning towards the transformation of the ACH Sector, resulting in sustainable livelihoods and social cohesion;
- Inclusive economic development: An ACH Sector that is dynamic and efficient, and fosters inclusive growth;
- Nation building and social cohesion programmes: The implementation of programmes that promote nation building and social cohesion;
- Radical economic transformation: The alignment of policies and programmes with transformative outcomes;
- Effective governance and implementation institutions: The alignment of structures, authorities and systems with goals and objectives towards the implementation of the department’s mandate.

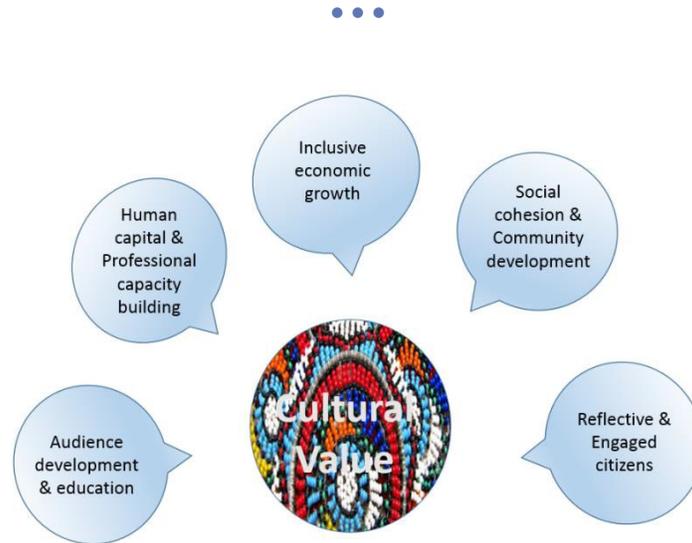


Figure 6: The Five Themes in the South African M&E Framework

The broad themes for cultural value below are based on:

- The preceding review of local and international literature on cultural value; and
- Key goals and areas of concern of the relevant parts of national policies, such as the National Development Plan (NDP), the Industrial Policy Action Plan (IPAP) and the New Growth Plan (NGP); and
- Specific areas of importance identified by DAC in their Strategic Plan, and the Mzansi Golden Economy (MGE) Guidelines: Criteria, Eligibility, Processes & Systems 2015/2016 – 2016/2017 version 1.0.

“It is clear that the choice of themes [for cultural value] reflect some quite specific policy aspirations and concerns, and the simple fact of organising the measures in the way served to foreground these aspirations” (Tabrett, 2014:88).

Defining themes for cultural value has advantages and disadvantages. From the point of view of arts organisations, defined themes may give some clarity in terms of reporting requirements and help to articulate the various kinds of cultural value that align with their aims, as well as to suggest ways of collecting data to demonstrate their value. On the other hand, they may find the framework restrictive and some of the themes irrelevant. The difficulties involved in measuring intrinsic

value, and the importance of Economic and Social values, may mean that the focus continues to be on instrumental values. Tabrett (2014) traces the development of cultural value themes in the Australian context (Human capital; Investment, assets and resources; Participation; Well-being; and Identity), pointing out the differences from those adopted in New Zealand. Indeed, there is no universal “best” set of cultural value themes, since the context and policy goals of each country (and project) need to be taken into account.



The use of themes and indicators will allow a much more systematic tracking of the types of projects that have been funded, and a clear way to evaluate the contribution of each project towards DAC’s strategic goals and the cultural policy objectives of South Africa as articulated in the White Paper on Arts, Culture and Heritage (1996) and the ongoing work on the Revised White Paper. When funds are limited, it may also provide a means of making decisions in a more equitable manner. The table below suggests five broad themes that draw on international literature and South African ACH policy, and examples of the kinds of indicators that could be used to measure them.

Table 7: South African Cultural Value Themes and Examples of Indicators

Theme	Examples of indicators
Audience Development & Education	Demographics (Age groups; Cultural/Race groups; Gender)
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)
	Income and Education Groups
	Participation & time-use
	Ticket sales/participation (numbers)
	Media coverage (incl. value of)
	Strategies for attracting new audiences
	Workshops and arts appreciation
	Attendance at "new" kinds of ACH
	Appreciation of ACH
Human Capital/Professional capacity building	Training offered
	Experience gained
	Volunteers & Interns
	Impact on local SMMEs (established)
	Impact on event traders and hawkers
	Opportunities & partnerships with local artists
	Opportunities & partnerships with local stakeholders
	Opportunities for cultural entrepreneurs
	Development of artistic quality
Showcasing South African art and artists	
Inclusive Economic Growth	Organiser spending
	Earned income/Turnover
	Sponsorship (and sources)
	Audience spending
	Producer spending
	Media representative spending
	Length of stay (Bed nights)
	Tourist leverage (extended trips)
	Contribution to Gross Geographic Product/Gross value added
Number and type of jobs created	



	Sustainability (Organisational & Environmental)
Social Cohesion & Community Development	Artist/Producer demographics (diversity)
	Artist/Producer origins (diversity)
	Audience diversity
	Cultural offerings (Local arts/heritage/languages)
	Audience motivation for attendance
	Audience & producer opinions
	Quality of Life & Wellbeing
	Trust
	Inclusiveness
	Marketing & Place identity
Reflective & Engaged Citizens	Reflectiveness
	Empathy
	Appreciation of diversity
	Community engagement
	Transformative self-knowledge
	Fostering dialogue & strengthening democratic institutions

The suggested themes sometimes include a mix of intrinsic, social and economic values, and there may be an overlap between indicators used to measure them. For example, determining the impact of the event on local audiences through indicators such as the percentage of the audience from the space in which the event happens, their opinions about how the event or project changed their views of ACH and perhaps their own perception of their identity and community, and the extent to which they benefitted across over a number of themes (Audience development; Community development; Economic growth).

5.3 Applying the Framework to Publically Funded Cultural Projects

In order to test the flexibility and applicability of the Framework, it was applied to some of the projects funded under the MGE initiative. The following section shows the results of the analysis, with some discussion.

Table 8 shows the results for a project funded under the category “Cultural Events: Annual Live Events for Young Artists”. The project was designed primarily to benefit young people (up to 25 years) in an existing township dance group (60 people). R30 000 DAC funding was received for a one day heritage month event in which the group presented modern and traditional dances to local audiences. Data used included organiser spending, the activities and beneficiaries, media coverage and a count of the audience.

Table 8: Application of the M&E Framework to a Youth Dance Event

Theme	Examples of indicators
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Audience Development & Education	✓ Ticket sales/participation (numbers): 300 people attended
	✓ Media coverage: Event reported in 1 local and 1 provincial newspaper
	✓ Local residents vs Visitors: Local
	✓ Appreciation of ACH: Traditional & modern dances showcased
Human Capital/Professional capacity building	✓ Training offered: Youth dance training (60 people)
	✓ Experience gained: Performance experience
	✓ Impact on local SMMEs (established): providers of catering, costumes and transport
	✓ Opportunities & partnerships with local artists: 3 local groups (41 artists) invited to perform
	✓ Showcasing South African art and artists: Traditional Zulu dance forms
Inclusive Economic Growth	✓ Organiser spending: R30 000
	✓ Sponsorship (and sources): DAC only
	✓ Number and type of jobs created: 11 paid service providers
Social Cohesion & Community Development	✓ Cultural offerings (Local arts/heritage/languages): Zulu heritage (Dance, Music)
	✓ Quality of Life & Wellbeing: “protect”; “journey” of young dancers.
Reflective & Engaged Citizens	✓ Community engagement: Developing young artists, supported by parents.

What the analysis shows is that the event, although unlikely to have a big economic impact, could still claim to have created value in a number of categories. A challenge in many of the reports is that, although some categories of value are claimed, they are not linked explicitly to indicators that can demonstrate this value. For example, even when organisers wrote eloquently of the importance of the event to the community in terms of developing young dancers and supporting and protecting them on their journey to adulthood, they did not include the opinions or words of the dancers themselves or their parents to provide evidence to support this claim. This would have been relatively easy to do (through, for example, a group discussion with the dancers and/or community after the event to ask them what it meant to them). Similarly, the characteristics of the service providers could have added to the claim that the event helped to stimulate the local economy.

The Framework was also applied to a provincial mixed arts festival (which included fine art, fashion, crafts and music) that happened over 3 days, and was funded under the “Cultural Events: Provincial Flagship” category (Table 9). The aims of the festival were to celebrate South African art and artists, especially from within the province in which it was held. The organisers are a registered non-profit organisation. They received funding of R2m from DAC (the largest sponsor) but also from a variety of



other sponsors. Data was collected via an audience survey, organiser spending, documentary evidence on the characteristics of activities and beneficiaries and on the type and market value of media coverage.

Table 9: Application of the M&E Framework to a Provincial Flagship Event

Theme	Examples of indicators
Audience Development & Education	✓ Age groups: 76% 34 years or younger
	✓ Gender: 43% female
	✓ Origins: Percentages from SA provinces & other
	✓ Income and Education Groups: 81% degree/diploma; 61% earn monthly income of R10 000 or less.
	✓ Ticket sales/participation (numbers): 12 151 (ticket sales, complementary tickets, free events); main festival free
	✓ Media coverage (incl. value of): Value of media coverage R1.8m
	✓ Local residents vs Visitors: 67% from within the province
	✓ Strategies for attracting new audiences: (for future implementation): improve website; more publicity; group discounts; work with local press; improved signage and local marketing.
	✓ Attendance at "new" kinds of ACH: 28% of audience came because they "wanted to try something new"
Human Capital/Professional capacity building	✓ Experience gained: "formal and informal skills development opportunities"
	✓ Volunteers & Interns: 70 people
	✓ Impact on local SMMEs (established): 19 local companies benefitted financially
	✓ Opportunities & partnerships with local artists
	✓ Showcasing South African art and artists
Inclusive Economic Growth	✓ Earned income/Turnover: R2.6m (turnover); R46 000 (ticket sales – 1.75%)
	✓ Sponsorship (and sources): DAC; Lottery; Local businesses
	✓ Length of stay (Bed nights):58% 2 nights (R650 p/p, p/n); 1211 visitors; 61% occupancy rate.
	✓ Tourist leverage (extended trips): 31% from outside the province
	✓ Number and type of jobs created: 135 paid artists & service providers;
Social Cohesion & Community Development	✓ Artist/Producer origins (diversity): 43% local artists (21/49)
	✓ Cultural offerings (Local arts/heritage/languages): wide variety offered in several languages and traditions.
	✓ Audience motivation for attendance: 60% "like the programme"; 40% "like the artists"; 28% "wanted to try something new" etc.



	✓ Marketing & Place identity: Value of media coverage R1.8m
Reflective & Engaged Citizens	✓ Reflectiveness: Aim to “enhance awareness”
	✓ Appreciation of diversity: “encourage inclusiveness through...intercultural and hybrid performance activities”.

The festival could provide evidence for a wide variety of cultural value indicators, thus justifying its relatively large sponsorship from DAC. For example, an important stated goal of the event is to develop audiences and provide access to the arts, culture and heritage of the province. As a result of the sponsorship, they were able to offer shows on the main festival for free. Although their turnover was R2.6 million, they only earned R46 000 from ticket sales as a result of offering so many free shows. The audience survey was also able to provide evidence for value claims related to audience social cohesion (opinion data showing that audiences appreciated the local artists who were showcased, and that at least some of them came to the festival to experience culture that was new to them). By reporting on planned strategies for attracting new audiences in the future, the event sets up goals that can be evaluated in the future.

Another example (Table 10) is the application of the Framework to two South African theatre productions invited to perform at a prestigious US festival. They received funding under the “Touring Ventures and Market Access” category. Sixteen performances were given, seen by 3000 people in the US. One show also presented at South African festivals to an audience of 3483. The total sponsorship received (from multiple donors, including DAC) was R833 334. Data was obtained from Audience numbers (ticket sales) and documentary evidence on activities.

Table 10: Application of the M&E Framework to a Touring Venture

Theme	Examples of indicators
Audience Development & Education	✓ Ticket sales/participation (numbers): 6483
	✓ Local residents vs Visitors: 3000 Intl; 3483 SA
Human Capital/Professional capacity building	✓ Experience gained: SA artists produce at Intl. festival
	✓ Development of artistic quality: “honour” of being invited to US festival; “developing high quality artistic work of an international standard of excellence”.
	✓ Showcasing South African art and artists: “Gain international exposure”
Inclusive Economic Growth	✓ Organiser spending: Budget presented showing amounts
	✓ Sponsorship (and sources): Multiple, but main one was DAC
	✓ Number and type of jobs created: 2 permanent; 9 contract (Part of a larger organisation)



Social Cohesion & Community Development	[No data]
Reflective & Engaged Citizens	[No data]

The report on the touring venture emphasised the impact on international and local audiences, the value of international experience and exposure gained by South African performers and the impact of this on the quality of their artistic production. The report did not contain any data on the final two categories.

The final example (Table 11) is an application of the Framework to a craft skills development project for youth and the disabled, which included a series of workshops run by mentors and an exhibition. It received R150 000 under the “Miscellaneous Arts Projects” category. The aims of the project included the development of artistic ability and high quality products, audience development (craft showcase) and market access (through the exhibition). Data was collected through documentary evidence on workshops (mentor journals) to track participation, enjoyment, skills development, artistic quality development and photographs of the workshops, exhibition and products.

Table 11: Application of the M&E Framework to a Craft Development Project

Theme	Examples of indicators
Audience Development & Education	✓ Age groups: Youth
	✓ Local residents vs Visitors: Local youth, people with disabilities
	✓ Workshops and arts appreciation
	✓ Appreciation of ACH
Human Capital/Professional capacity building	✓ Training offered: Workshops
	✓ Opportunities & partnerships with local artists: aim is to establish a “network” of local traditional crafters
	✓ Opportunities for cultural entrepreneurs: Aim to improve product quality and market access.
	✓ Development of artistic quality
Inclusive Economic Growth	✓ Showcasing South African art and artists: traditional African crafts
	✓ Sponsorship (and sources)
Social Cohesion & Community Development	✓ Artist/Producer demographics (diversity): Youth, Women, People with disabilities
	✓ Cultural offerings (Local arts/heritage/languages): Showcase traditional African crafts
	✓ Inclusiveness: Exhibition including all community groups
Reflective & Engaged Citizens	✓ Appreciation of diversity



 Community engagement
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The report provided a wealth of documentary, qualitative data on the values created by the project. It could have been strengthened, however, by the addition of some quantitative data, such as the number of people who participated in the workshops and attendance figures at the exhibition.

5.4 Applying the Framework: Changing emphasis for different funding categories

The advantage of having a broad framework is that it can be adapted to reflect the specific aims of the different funding categories in MGE. The table below matches the specific objectives in the MGE Guidelines to the three most important value themes for this funding category.

Funding category	Specific Objectives (MGE Guidelines, Section C)	Top 3 Framework Themes
Cultural Events	<ul style="list-style-type: none"> -To support diverse arts events which are geographically spread throughout a calendar period. -To develop and maintain arts audiences. -To support local economic development and job creation imperatives. 	<ul style="list-style-type: none"> -Audience Development & Education -Inclusive Economic Growth - Social Cohesion & Community Development
Touring Ventures	<ul style="list-style-type: none"> -Showcase and promote to new audiences diverse South African based productions, exhibitions, designs and innovation related to the arts, culture and heritage sector. -To facilitate cultural products touring provincially, nationally and or internationally; to provide longer term employment opportunities for artists, audience development and to develop new markets. 	<ul style="list-style-type: none"> -Audience Development & Education -Inclusive Economic Growth -Human capital/Professional capacity building
Public Art	<ul style="list-style-type: none"> -To support diverse arts events which are geographically spread throughout a calendar period. -To develop and maintain arts audiences. -To support local economic development and job creation imperatives. -To beautify and promote the use of public space. -To promote involvement in the arts by the general public. 	<ul style="list-style-type: none"> -Audience Development & Education -Inclusive Economic Growth -Reflective & Engaged citizens

Depending on the project, indicators for other value themes may also be included, but the Framework could require that projects in a specific category report on at least some of the indicators aligned with the three most important value themes identified for their category. What is immediately apparent is that, in line with the repositioning of the new White Paper on Arts, Culture and Heritage currently under discussion, all categories are strongly linked to the Audience Development and Education and Inclusive Economic Growth themes.

However, the range of indicators used to demonstrate value within these broad themes (and their valuation methods) are adaptable enough to take into account the different foci and goals of each project.



In addition, there is scope for different projects to foreground the indicators related to their most important outcomes. For example, as shown in the application examples above, a local event, such as the development of craft skills or a dance exhibition, can still report on indicators in the Economic Growth category, such as sponsorship received, the number of people employed and organiser spending, but will have much more to report in the Audience Development and Education or Social Cohesion and Community Development categories.

6. Monitoring progress towards achieving outcomes

Monitoring, although often linked with Evaluation as a management tool, has a different function: the ongoing tracking of progress towards a goal during the implementation and running of a project. However, it is linked to evaluation in the sense that the goals and methods of evaluation need to be determined before steps towards achieving those goals can be meaningfully articulated.

A framework recommended by the Georgia Council for the Arts is the “Logic Model”, which incorporates Inputs, Activities, Outputs and Outcomes in achieving the overall goals (Figure 7).

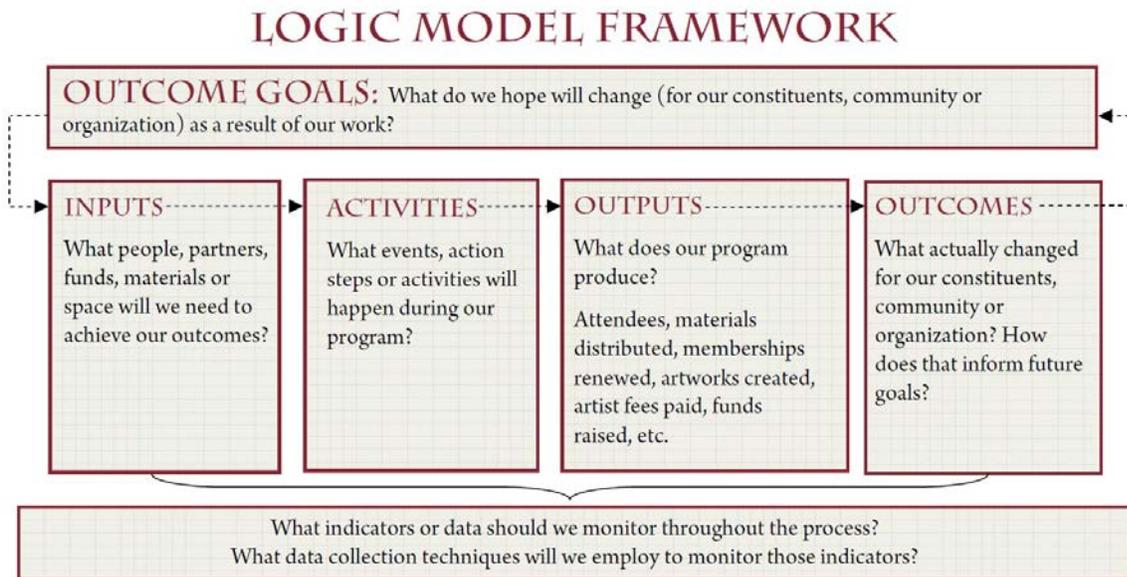


Figure 7: A framework for monitoring and evaluation (Source: Georgia Council for the Arts, 2007)

In practice, many of the sampled projects and events funded by the DAC Mzansi Golden Economy initiative already incorporate something similar and it is required in the 2015/16 application form to state: Main Project Activities; Start Date; End Date; where the activity will take place; and Outputs/Outcomes. What the Logic Framework does is to link these activities to sub-goals and overall goals, and to define what indicators or data can be used to monitor progress towards the goals.



Indicators and data used to monitor progress could include both quantitative and qualitative information, such as spending, meeting minutes, number of people working on the project, reports on workshops, training offered, community partners involved, etc. Table 13 lists four potential sources of data for M&E and the costs associated with them. The lowest cost and most easily accessible data is the “own information” category, that is, the information of the event or programme organisers themselves. This data is routinely collected during the running of the project and there is thus little additional cost to collecting the information. It includes things like financial records, types of spending, the characteristics of service providers used, the number of demographics of employees, interns and volunteers, ticket sales etc. The second category “observation” may require additional costs and some planning ahead, but increases the validity and reliability of M&E in that it does not rely on internal reporting only. It includes such things as audience/participant counts, media reports, documentary evidence such as photographs, and ongoing recording and reporting on activities, such as journal or co-ordinator reports and meeting minutes. Box 3 demonstrates how an interactive drumming project run at schools documented each performance, noting the objectives that the project achieved in each particular visit, the challenges faced, and recommendations for the future.

Table 13: Data Source and Costs

Data Source	Types of information
1. Own information Cost: Low	Financial records Ticket sales Spending Percentage of local service providers used & their type (established firms, SMMEs etc) Jobs and volunteers Artist diversity and numbers Cultural offerings Meeting minutes Cooperation with local stakeholders (Reports on meetings; Training workshops etc.)
2. Observation Cost: Low to Medium	Audience counts Media reports Photographs Mentor documentation/other written progress reports
3. Surveys Cost: Medium to High	Audience surveys (spending, activities, opinions) Producer (artist) surveys Media representative surveys Service provider surveys
4. Analysis Cost: High	Economic impact on town/region/province Wider employment impact Non-market valuation methods Sustainability analysis

Category three, “surveys”, refers to formal research conducted either by the organisers themselves, or by an independent researcher or consulting company. This is a very powerful data source in that it allows direct feedback from audiences, producers, media representatives and service providers to event



organisers. However, properly run surveys can be expensive because they include a number of time-consuming activities such as questionnaire design, distribution of self-completion questionnaires and/or face-to-face interviews, capturing the data, data analysis and report writing. Survey costs vary from medium (if conducted using in-house resources on a limited sample) to high (if conducted by outside agents on a representative sample). For events that occur regularly (for example, once a year) it is not necessary to conduct surveys every time. The data can be very effectively used to demonstrate how the project is meeting its stated goals, who benefits and in what ways, to engage with stakeholders, and to plan ahead. Carefully designed surveys can be used to measure a variety of economic, social and even intrinsic values.

Finally, the fourth category, “analysis”, refers to the use of data to calculate metrics such as economic impact, employment impact (including indirect and induced employment impacts as the second-round effects of increased spending have an effect on service providers), non-market valuation methods (such as willingness-to-pay studies discussed previously) and sustainability analysis. The costs of this kind of data are usually high because they require input from a reliable and credible outside researcher who is an expert in the field. They also usually require at least some information collected via surveys in order to get an indication of such things as the average spending of locals, visitors, producers and media representatives and their average length of stay. Non-market studies (measuring social and intrinsic values) are completely reliant on accurate survey data. This makes “analysis” expensive, but (like survey data) it can be used most effectively to demonstrate a range of different kinds of cultural value and to assess the extent to which the goals of the organisers have been met. Analysis by an outside researcher or consultant also increases the validity and reliability of this sort of data.



Box 3. Monitoring Example: Interactive Drumming Project

The project was to develop an interactive drumming show to be taken to 20 local schools in the district, especially poorly resourced rural schools. It received DAC funding under the Touring ventures and market access category of the MGE initiative. The project aimed to “teach students about their culture and heritage through better team work” and “showcase the beauty of African cultures and heritage”. Twelve artists and nine support staff were employed. The project was documented through the use of reports and photographs of each school visit and through the use of tables that tracked the date, venue, objectives achieved, challenges, recommendations and stakeholders of each phase.

Date	Venue	Objectives achieved	Challenges	Recommendations	Stakeholders
22 June 2016	Province Municipality School name	When we arrived at the school, they were well prepared for us. The performance was at its best. All the teachers were there and cooperated with us. The learners showed a strong sense of connection with us. Our most important time was when the learners were willing to play the instruments with us. There was participation of local community members who came to do an opening performance for us.	Because it was close to the school holidays, not all the pupils were there. However, the target number of learners was still reached.	It would be better to have future performances near the start or middle of school terms (although the school feeding programme meant many learners were still at school even close to the holidays). 	Provincial D.E.O School Principal.

7. The Way Forward

Development of the M&E Framework was based on: a review of the theory of cultural value, international best-practice, and existing South African research on cultural valuations and valuation methods; The application of the Framework to a sample of projects funded under DAC’s “Mzansi’s Golden Economy” initiative within the various funding categories; and a workshop with stakeholders at which the Framework was presented and discussed, and feedback was incorporated.

“Impact measure, broadly defined, may play a growing role in arts policy in future years. The challenge lies in aggregating the individual level impacts in some fashion so as to help frame and inform a policy-level understanding of the public value of the arts” (Brown and Novak-Leonard, 2013).



The next phase of the project is to:

- Test the Framework by applying it to a sample of arts, culture and heritage projects funded under the Mzansi's Golden Economy initiative. Projects will be identified, in conjunction with DAC, which are representative of all the funding categories, and geographically spread. As far as possible, the organisers of the events chosen for M&E will participate in the process, especially in determining the kinds of value that their project produces, the data already available, and the M&E methods to be used.
- Stakeholder training workshops will be held in order to explain how the Framework functions and how it can be applied.
- A training and information manual (based on this report) targeting arts, culture and heritage organisations will be developed and distributed.
- A report on the results of the application of the M&E Framework will be written and presented to stakeholders.
- Based on the report, recommendations for the future use of the Framework will be made.

Part of the M&E research project is also to develop a set of valuation tools that can be adapted by arts practitioners themselves in order to reduce the costs of evaluation. These will include:

- A survey instrument (questionnaire) that can be used as the basis for audience surveys at cultural events and performances to measure economic and social values;
- An online economic impact calculator that can be used by arts organisations themselves to calculate and evaluate the economic impact of their event. This will be based on international best practice, while also making use of South Africa's significant expertise in conducting economic impact studies.

8. Concluding Remarks

This report set out to develop and, to a limited extent, test a Monitoring and Evaluation Framework for publically funded arts, culture and heritage projects. From a review of the international literature, three kinds of cultural value were identified: Economic, Social and Intrinsic. Debates around the relationship of these values to each other and to their relevance to cultural policy were reviewed. Using South African and international case studies, a variety of valuation methods were discussed.

From the work on cultural indicators, five major cultural value "themes" were identified in line with the aims of the Mzansi's Golden Economy funding guidelines developed by the Department of Arts and Culture. These were:

- Audience development and education
- Human capital and professional capacity building
- Inclusive economic growth
- Social cohesion and community development
- Reflective and engaged citizens



Examples of indicators for each theme were also identified. It was then demonstrated how the Framework could be applied to a wide variety of funded projects and how the emphasis of the Framework could be changed depending on the specific aims of each funding category.

In terms of monitoring progress towards the stated goals of the project, a “Logic” model was suggested, and some examples of data sources and current monitoring practices amongst the sample of MGE funded projects were given. Finally, the way forward was discussed.

Measuring the value of arts, culture and heritage to society is an ongoing international concern, especially in the wake of the financial crisis when governments worldwide are cutting their budgets and requiring that publically funded projects demonstrate their value. The M&E Framework developed here sets out to provide both artistic producers and funders with a common language that can be used to express and demonstrate their value.



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