



south african
cultural observatory

MEASURING AND VALUING SOUTH AFRICA'S CULTURAL AND SPORT ECONOMY



National Arts Festival 2024: The Economic, Cultural and Social Value of the Festival

Submitted to: Department of Sports, Arts and Culture | **Submitted by:** Nelson Mandela University





South African Cultural Observatory

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18 December 2024

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1 Executive Summary

The purpose of this report was to provide an assessment of the social, economic and cultural impact of the 2024 National Arts Festival, reflecting also on its contribution to the South African cultural ecosystem on the occasion of the 50th anniversary of the Festival. Research methods included an audience survey (in-person interviews, and an online option), interviews with Festival organisers, and an online survey and in-person focus group discussions with artistic producers.

NAF 2024 audience members who responded to the survey were mostly from the Eastern Cape (63%, 35% from Makhanda), with the next most common provinces being Gauteng (13%) and the Western Cape (12%). Visitors to the NAF attended an average of 6.5 ticketed shows, and 1.9 free events during an average stay of 3.4 nights and 4.2 days. The NAF has a cohort of loyal festinos, who attend the festival year after year, with 26% having attended the Festival 10 or more time previously. However, there is also a new, younger cohort: 17% of respondents were attending the NAF for the first time in 2024.

The generally high ratings obtained by the Festival for most of its offerings were maintained in the post-COVID period: 80% of festinos rated shows on the Curated programme 4 or 5 out of 5 in terms of value for money, with similar ratings for Fringe shows. The exception was the Craft Markets, which received lower ratings than in the past (57% of festinos rating this aspect 4 or 5 out of 5).

The larger audience sample size in 2024 (1028 responses) allowed the analysis of activities and opinions amongst differed festino age groups. For example, the “young, social and price sensitive” group attended fewer ticketed shows and more free events and are most interested in the “vibe” and social scene that the NAF offers, and had higher ratings for the Craft Markets. On the other hand, the “older planners and show focused festinos” attended more tickets shows and had higher spending patterns, and rated shows on the Curated programme most highly. The survey also showed that the NAF continues to play an important role in providing access to the arts and building inter-cultural understanding and social cohesion.

Artistic producers who responded to the online survey were almost evenly balanced between the emerging (89%) and established (11%) categories in the demographic age range of 18-25 (13%), 26-35 (33%), 36-50 (38%) and 51-64 (16%). The gender distribution was male-dominated (67%), with 30% female artistic producers. Regarding race categorisation, 57% were black artistic producers, 8% were coloured, and 3% were white. The Focus Group Discussions (FGD) were attended by a general representation of emerging and established artistic producers, who have produced creative works at NAF for 2 years and above. The analysis, therefore, of the socio-political contribution of NAF to the South African arts and culture industry draws from these extensive experiences of artistic producers.

The analysis of the online artistic producer survey and FGDs highlights that NAF is an important institution in the training, development, and networking of artistic producers and audiences across the divide. Furthermore, the data revealed that NAF is considered by the artistic producers as a site for artistic expression, nurturing, reflection, international networking and standardisation of creative works and standards in the country. However, the artistic producers

raised challenges related to programming and limited financial benefits to artistic producers during and after the festival.

The economic impact of the NAF 2024 on the economy of Makhanda was calculated to R57,9 million, and on the Eastern Cape, R131,8 million. The decline from previous years can be attributed to factors such as a rising inflation and poor economic growth, which has generally decreased domestic tourism. In addition to the Festival itself, the NAF has also become an important local hub for social development in Makhanda: In June/July 2024, the NAF sourced R6,7 million from the Social Employment Fund that created 1604 direct jobs in addition to the 247 work opportunities related to the Festival itself.

2 The NAF Context: A Historical Perspective

The National Arts Festival (NAF) is an annual performing arts festival in Makhanda. It was established in 1974 to promote and preserve the culture of the 1820 British Settlers (Snowball and Webb, 2008). Festival events initially focused on Western art, such as theatre performances by playwrights such as Shakespeare and George Bernard Shaw. Performances included orchestra, ballet and classical music concerts from British composers such as Henry Purcell and Sir Edward William Edgar, and Shakespearian theatre (Snowball and Webb, 2008).

Organisers and sponsors of the NAF in the early 1970s were the Grahamstown Foundation, the National Members Council, the 1820 Settler's Foundation and private members of Rhodes University. By 1976, the festival had become more inclusive and showcased South African short films and exhibitions (Snowball and Webb, 2008). These were from playwrights such as Pieter-Dirk Uys and Barney Simon. The inclusion of South African art provided a platform to promote local artists, considering that the country faced international isolation due to Apartheid.

Historical importance of the National Arts Festival

The 1820 Settlers National Monument Building hosted the inaugural Festival in 1974 (Schmidt, 2019). The Monument Building was initially the sole venue and remains the main venue for performances. The Guy Butler Theatre at the Monument is the prominent venue for central performances. However, due to the festival's increasing popularity in the early 1980s, there was a need for more venues. Around ninety other venues across town were made available for performances (Schmidt, 2019). These ranged from the City Hall, Rhodes University venues, school halls, churches and outdoor community venues.

The National Arts Festival usually runs for eleven days from June to July. Types of art performed at the festival include but are not limited to music, dance, theatre, visual arts and film. From 1983 to 1994, the NAF was often used to challenge the status quo during Apartheid (Snowball and Webb, 2008). Politically charged performances were held by playwrights and artists, such as Athol Fugard, Dr John Kani and many others (Snowball and Webb, 2008). Examples included "Sizwe Bansi is Dead" and "The Island", collaborations between Fugard and Dr Kani.

In 1985, for the first time, winners of the Standard Bank Young Artist Award were of African and mixed-race origin, namely Maishe Maponya and Sidwell Hartman (Snowball and Webb, 2008). This signified the festival as a truly South African occasion representative of all its people.

South Africa as a democratic nation

On the 27th of April 1994, the first democratic elections were held in South Africa, signifying a new era for the country. Post-Apartheid, the NAF was able to join the international stage after international sanctions against South Africa were lifted (Treffry-Goatley, 2010). Performances from international artists, such as the Royal Shakespeare Company from the United Kingdom, were included in the programme (Griffiths, 1999). This elevated NAF to be recognised as a global festival. The inclusion of international artists also benefitted local artists as they performed on a globally recognised platform, exposing their talents on a larger scale.

With the shift to democracy, the focus was no longer on protest performances. NAF became a platform for all South African stories (Treffry-Goatley, 2010). The programme became more inclusive, featuring artists from different socioeconomic backgrounds and racial groups (Snowball and Webb, 2008). Indigenous African art started to gain momentum and there was a spirit of empowerment in the themes.

The inclusive theme also reflected an increased freedom of speech in how artists were allowed to express themselves. Contemporary issues at the time, such as reconciliation, gender-based violence, HIV/AIDS and poverty, were all addressed through performance (Hauptfleisch, 2006). Playwrights such as Athol Fugard and Dr John Kani, who had previously staged protest performances, continued to stage shows that addressed the new social issues. Examples include "Nothing but The Truth" by Dr John Kani (2002), "The Suit" by Mothobi Mutloatse (1994) and "Ubu and the Truth Commission" by William Kentridge and Handspring Puppet Company (1997). The festival during democracy continued to serve as a platform for protest performances but these addressed current economic issues (Hauptfleisch, 2006).

The Festival programme: Main (Curated) and Fringe

The festival includes a main and a fringe programme (Snowball and Webb, 2008). The main programme is curated for excellence, comprising carefully selected performances by an artistic committee. The committee consists of experienced and well-regarded individuals from the South African Arts community. These are artists, critics, curators and cultural leaders. Membership of the committee varies each year. Popular genres showcased in the main programme include music, theatre and visual arts (National Arts Festival, 2024). Performances for the programme are usually held in prominent venues such as the Monument Building, Rhodes University Theatre and the Great Hall at Rhodes.

Access to the fringe programme is more relaxed than the main (National Arts Festival, 2024). It is open to any artist or group across all genres. This allows the fringe to provide a more versatile programme ranging from theatre, stand-up comedy, magic shows, cabaret and multimedia. Fringe performances occur in unconventional venues, such as church halls, community centres, pop-up venues and outdoor stages. The fringe serves as a platform for new artists to showcase their work and gain an opportunity to perform in the main programme through the Standard Bank Young Artist Award (National Arts Festival, 2024).

NAF Sponsorship and Corporate Social Responsibility

In 1984, Standard Bank took over as the festival's primary sponsor (Snowball and Webb, 2008). Other sponsors of NAF include the Department of Arts and Culture, Makana Municipality, Multichoice and Distell (National Arts Festival, 2020). The sponsorship of Standard Bank has

elevated the festival in various ways. Financial support from the bank has enabled the festival's longevity and ensured that it attracts international and local artists. Standard Bank's sponsorship has also allowed NAF to reach larger audiences through affordable tickets where discounts of up to 40% off are offered to Standard Bank cardholders (National Arts Festival, 2020).

The Standard Bank Young Artist Awards is often regarded as the bank's most significant contribution. Recipients of the award receive a cash prize. Most importantly, they also receive financial support and mentorship to hold a performance in the main programme for the following year (National Arts Festival, 2020). This initiative creates exposure for new artists, and many winners have been reported to have established successful careers after receiving the award.

The National Arts Festival also supports other projects, especially in the township. NAF provides promotional and logistical support to the Fingo Festival. The Fingo Festival was established in 2011 and is held in the local Fingo Village (Schmidt, 2019). It is usually held over seven days and runs concurrently with the NAF. The Fingo Festival is included in the National Arts Festival programme to help raise awareness of its existence. NAF also provides some infrastructural equipment to ensure that it runs smoothly. The project aims to provide more access to arts and culture for locals residing in the township (Schmidt, 2019). A vital feature of the Fingo Festival is its "open stage" segment, where performances are showcased free of charge. Notable performers at the festival have been Msaki, Kyle Shepherd, Asanda Mqiki and Gcina Mhlophe, among others. The collaborative relationship between the two festivals is how NAF promotes inclusivity and addresses social inequalities.

Other projects supported by NAF include the Power Station Project, in which the Makhanda power station was transformed into a community arts centre to showcase exhibitions (Schmidt, 2019). The Eastern Cape School's Festival is another example where around 6000 learners and teachers experience a smaller version of the NAF. This is done with performances and workshops to encourage the younger generation to become future artists (Schmidt, 2019).

COVID-19 challenges

When COVID-19 hit South Africa in March 2020, the government immediately implemented strict regulations against physical interactions and large gatherings (Stiegler and Bouchard, 2020). The National Arts Festival was naturally affected, and organisers had to cancel the physical Festival for 2020. NAF switched to being a fully digital festival for two years, 2020 and 2021 (Schmidt, 2022). This meant that festival organisers had to plan a virtual programme for all performances in those years, which led to challenges, such as technical difficulties (Schmidt, 2022).

Other challenges faced by organisers included audience engagement, where it proved difficult to keep the audience enthusiastically engaged. Schmidt (2022), reports that participation levels were reduced compared to previous years, where there was physical interaction.

The shift to online proved financially challenging for artists and street vendors whose livelihoods depended on the festival economy. Makhanda also suffered a financial loss due to the decline in tourism, which is usually prevalent during the festival period (Schmidt, 2022).

The NAF returned as a physical festival in 2022 after being fully digital. The return was not without challenges, which included lower audience attendance compared to pre-COVID. Other challenges included infrastructural facilities that had to be reacquired for performances (Schmidt, 2022). Although there were challenges, the pandemic allowed organisers to enhance their digital skills, which remained relevant after the lockdown (Schmidt, 2022). The NAF continued integrating digital elements into its programme after lockdown restrictions were officially lifted in South Africa in June 2022. This helped the festival reach a larger audience through live and virtual participation. NAF is also protected against future unforeseen circumstances and is better prepared for them (Schmidt, 2022).

The National Arts Festival's 50th anniversary

The year 2024 was significant for the festival as it jointly celebrated 30 years of democracy, 40 years of the Standard Bank Young Artist Award and its 50th anniversary (National Arts Festival, 2024). This commemoration allowed festival organisers to introspect and reinvent the Festival so that it continues to evolve in response to the current cultural landscape. To celebrate 50 years, NAF showcased almost 300 shows between the 20th and 30th of June 2024 (Independent Online, 2024). To celebrate the milestone, several artists from earlier years returned to honour the event. For example, Sello Maake kaNcube reprised his role in "The Suit", while Sipho "Hostix" Mabuse also returned for a jazz performance (Independent Online, 2024).

The 2024 "Bridging Generations, Celebrating Creativity" theme aimed to nurture creativity across different generations of artists and audience members (National Arts Festival, 2024). The theme honoured legendary artists, such as Gregory Maqoma and Christine Dixie, while highlighting the influence of new creatives, such as Mook Lion and Paul Noko Maja. The unity among artists is a tool that ensures creative knowledge is passed down and constantly generated to sustain the festival for generations to come.

After Apartheid, South African vernacular languages were slowly integrated into the programme, creating space for new playwrights and artists (Independent Online, 2024). Many performances featured languages such as IsiXhosa, IsiZulu and Sesotho. As the festival developed, performances strictly in vernacular emerged to promote linguistic diversity. First-time playwright Sibongakonke Mama's "Ibuhlungu leNdawo" (This place hurts) was one of the isiXhosa debuts, performed at the Rhodes Box Theatre in 2024 (National Arts Festival, 2024). Napo Masheane's "Thaba Bosiu – The Musical", strictly performed in Sesotho, was also performed at the Guy Butler Theatre in 2024.

By 2008, the National Arts Festival had grown to be regarded as the largest festival on the African continent as regards the number and variety of artistic offerings (Snowball and Webb, 2008). Over the years, it moved through different eras, namely Apartheid, democracy, the COVID-19 and post-COVID periods.

3 Research Design, Methods and Response Rate

The research takes a mixed methods approach by combining qualitative and quantitative techniques to investigate the economic, cultural and social impacts of the National Arts Festival. The central premise of the mixed methods approach is that the combination of quantitative and qualitative approaches provides a better understanding of research questions relating to complex social phenomena than either approach alone (Creswell and Plano Clark,

2011). In this way, the limitations of using only one research method are recognised while the strengths of each approach can be harnessed for data collection and analysis (Hawthorne, 2017). In this case, a multi-layered use of research methods, data and analysis techniques was determined as an appropriate means of targeting the different qualitative and quantitative components of the research questions. These relate to the complex social phenomena of artistic economies because it allows for more measurable aspects of the economy, such as economic value, to be combined with subjectively experienced cultural and social values. In so doing, a more holistic overview of the contribution and value of the NAF is provided.

Data Collection and Analysis

The data collection process takes a two-step approach. Firstly, during the festival in Makhanda (20-30 June 2024), focus groups were held with artistic producers to reflect on the contribution of the NAF to South Africa's cultural and creative sector over 50 years. Audience surveys were also run during the festival to estimate the economic impact of the NAF and to investigate audience perceptions of the festival. The second step was conducted once the festival ended. This involved interviews with some key stakeholders on the festival's cultural and social impact. Survey forms were also sent to the festival artistic producers and technical crew to capture their spending for the economic impact component of the research as well as their perceptions of the success of the festival. Lastly, festival organiser data was provided on ticket sales, sponsorship, spending on service provision etc to contribute to the organiser spending component of the economic impact study. See Figure 1 below for an overview of the data collection process and the analysis techniques.

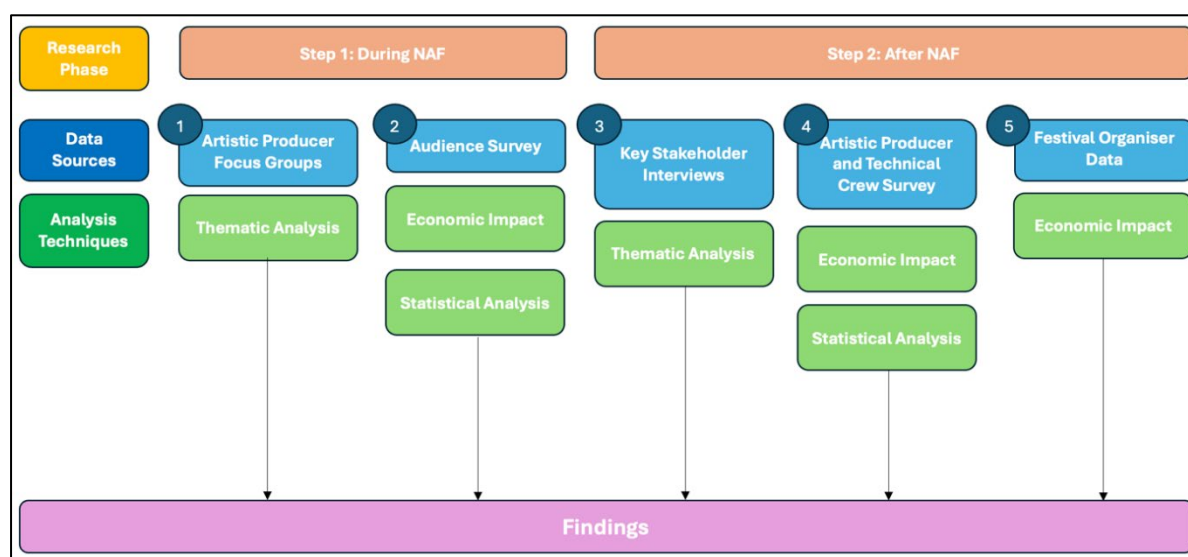


Figure 1 Visual Representation of NAF 2024 Study Design

The mixed methods approach continues through to the analysis of the data by using the merging or converging technique (Creswell and Plano Clark, 2011; Hawthorne, 2017) to integrate the qualitative data gained from interviews and focus groups with numerical information gained from quantitative survey data. In so doing, the analysis does not favour one type of data over another but uses triangulation to corroborate the findings of each data type and to study the subject from more than one angle.

Qualitative Data: Focus Groups and Interviews

To gain insights into the cultural and social values of the National Arts Festival as a stalwart of South Africa's festival landscape and the contributions that the festival makes to the cultural sector, semi-structured focus groups were held with artistic producers during the festival period (20-30 June 2024).

The themes for discussion included but were not limited to:

- The impact of the NAF on shaping the artistic and cultural landscape of South Africa
- Roles the NAF has played in artistic production in terms of things like providing a space for artists to network with other artists, share ideas, showcase their work, get feedback on the quality of the work, build future collaborations, be spotted by producers from other festivals, etc.
- The role the NAF plays in connecting artists to audiences
- The social role of the NAF as an outlet for anti-apartheid activism and political commentary
- the role of the NAF in the new post-pandemic era

In total, two focus groups were conducted in person with 24 participants, with each focus group (made up of a mixture of emerging and established producers), which lasted on average between 60 and 90 minutes.

Moreover, following the completion of the festival, interviews were held with festival organisers to discuss the social value and impact of the NAF. This included the environmental and job creation aspects of the festival's work within the local community of the host city of Makhanda.

In both cases, a semi-structured approach was chosen to ensure that the discussion remained on topic and was targeted towards the research questions, yet still allowed for flexibility in the process of asking questions (Bryman, 2011). Following the semi-structured interview approach also allowed for comparability across the two groups as similar questions were asked (Bryman, 2011).

A non-probability sampling approach was used for the research as it emphasized understanding rather than on achieving representativity (Cresswell and Plano Clark, 2011). A purposive sampling method was used to recruit focus groups and interview participants. The method refers to the deliberate identification and selection of participants who meet the research criteria and are proficient and well-informed regarding the phenomenon of interest to suit the purpose of the study (Bryman, 2011; Cresswell and Plano Clark, 2011). Potential research participants were identified and invited to focus group discussions by the NAF.

A thematic analysis was used to analyse the data gathered from focus groups and interviews. In each case, the focus groups and interviews were recorded, transcribed verbatim and analysed to determine the main themes, focusing on differences between emerging and established, and local and visiting producers.

Quantitative Data: Surveys

The quantitative aspect of the research involved surveys to collect spending data from audiences (during the festival) as well as artistic producers and technical crews (after the festival). This was combined with data from festival organisers provided after the event on ticket

sales, sponsorship, direct employment and partnerships with local service providers. The purpose of this aspect of the research was to value the economic impact of the NAF.

Two techniques were used to administer the audience survey throughout the festival. Firstly, an online version of the questionnaire was distributed through the use of QR codes displayed on posters at festival venues and on the festival programme, and the link to the survey was sent out by festival organisers after the event via their newsletter. Secondly, several trained interviewers (honours students from the Rhodes University economics and drama departments) interviewed festival goers in person at festival venues. This approach was taken to ensure as many questionnaires as possible were completed by a range of festival goers as some respondents may prefer to complete an in-person rather than an online questionnaire. Following the festival, online surveys were distributed to the artistic producers and technical crews by the NAF on behalf of the research team. In both cases, questions related to spending at the festival, opinions on the value of the festival and demographic information were asked.

Response rates for the Audience survey were very good (as shown in Table 1 below). A total audience sample of 1028 was obtained: 462 from in-person interviews during the Festival, and 566 responses to an online survey distributed during and after the festival. Of the respondents,

- 672 (65.5%) were visitors
- 355 (34.5%) were local residents

The largest group of festinos came from the Eastern Cape (44%), followed by Gauteng (20%) and the Western Cape (18%). As shown in Table 1, previous NAF studies found very similar visitor profiles, although the decline in the proportion of festinos with English as their home language is evident as the Festival has become for diverse.

Table 1 Audience Survey Response Rates, Gender and Home Language

Gender					
	2006	2013	2016	2019	2024
Sample Size	669	682	612	555	1028
Women (%)	59.4	54.2	59.6	58.3	59.2
Men (%)	40.6	45.8	40.4	41.7	35.9
Non-Binary (%)					3.0
Prefer not to answer (%)					1.8
	Home Language (%)				
English	64.2	60.6	65	60.7	50.8
isiXhosa	10.9	14.7	9.6	23.3	22.5
Afrikaans	11.4	10.5	14	9	8.6
isiZulu	4.2	3.1	5.3	4.1	5.4

Other	9.3	11.1	6.2	2.9	8.9
Prefer not to answer					3.9

For the online artistic producer survey, there were 77 responses: 36 Emerging and 41 Established artistic producers. Most respondents (68) were on the Fringe Programme.

The Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture and Heritage (SACO, 2016) was used to guide the survey design while the online South African Festival Economic Impact Calculator, developed by the South African Cultural Observatory, was used to calculate the economic impact of the NAF on the host economy.

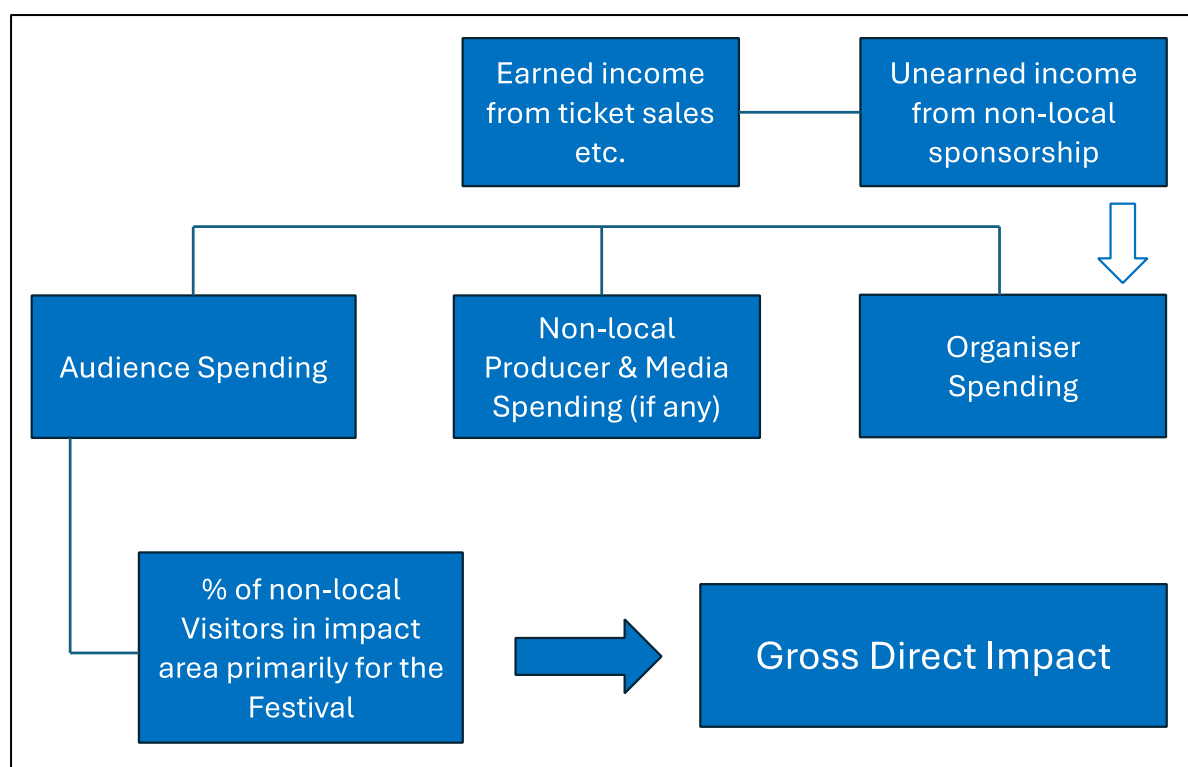


Figure 2 Graphical representation of Economic Impact Method

Research Ethics

As the research applied to human participants, ethical clearance was sought and granted by the Rhodes University Human Research Ethics Committee (Reference: 2024-7882-8736).

For all interviews and focus groups, participants were sent an informed consent form in advance of the meeting that set out the purpose of the research. The rights of the participants were explained as well as how the data would be stored, used, and reported anonymously. To ensure that responses could not be linked to an individual, no names are reported. Rather, the position of the person is reported in a generalised manner.

In the case of online surveys, informed consent was obtained at the start of the survey as the only required question that had to be completed before the participant could proceed with the

survey. For in-person surveys, the research team explained the purpose of the research and the rights of the participants before completing the survey with the participants. In both cases, the voluntary nature of participation was emphasised and options of 'I prefer not to answer' were also included for potentially sensitive questions on income and demographics that allowed participants to choose to skip any questions that they did not wish to answer.

4 Audience Survey

4.1 The Demographics of Respondents

As in previous years, the sample size on which the study is based is extensive. Although the precise demographics of the Festino population are not known, interviewers were provided with a carefully constructed quota. In debriefing, they did not report any substantial differences between their impression of the demographics of festinos and the quota, except for some difficulty in finding older festinos who were willing to be interviewed. This matches the impression of festival organisers that the NAF audience is becoming younger. The use of an online survey (which had not been done in previous festivals) resulted in a great diversity of responses, as shown in Table 1. Compared to previous years, there do not appear to be any significant differences between the gender groups of festinos in the five most recent studies. There are still somewhat more women than men who attend. While the largest home language group is still English (50.8%), the increase in African language home language speakers observed in the 2019 study has been maintained, and there has been a rise in the diversity of other home languages.

Also as found in previous studies, the vast majority of festinos (97%) were South Africans (Table 2). Other nationalities included: Brazil, Canada, Congo, Germany, Ireland, Lesotho, Malawi, Mozambique, Namibia, Switzerland, the UK, the United Arab Emirates, the USA, and Zimbabwe.

As found in the 2019 study, a larger percentage of festinos come from within the Eastern Cape (63%). This is likely to be because of the slow-down in economic growth in South Africa post-COVID, which reduced the disposable income of households, making it less affordable for South Africans based in other provinces to attend festivals far from home. Nevertheless, there continue to be visitors from other provinces, particularly Gauteng (13%) and the Western Cape (12%).

Table 2 Festino origins

Country of Permanent Residence	2013 (%)	2016 (%)	2019 (%)	2024 (%)
South Africa	91	94	91	97
Elsewhere in Africa	2	2.4	2.4	1.65
Other	7	3.6	6.6	0.78
Unknown				0.39
South African's Home Province				
Eastern Cape	46	33	55	63
Makhanda/Grahamstown	20	16	23	35
Other Eastern Cape	26	17	32	25
Unknown				3
Gauteng	21	24	20	13
Western Cape	19	22	15	12
KwaZulu-Natal	7	10	5	5
Free State	3	2.5	1	2
Other	4	8.5	4	5

The origins of festinos who were interviewed during the festival period and who responded to the online survey were mapped using geographic information systems (GIS). QGIS was used to illustrate festino origins by province and also within the Eastern Cape as the host province of the festival. In each case, a colour scale is used to represent the number of attendees who came from each place, where a darker colour represents a larger number of people.

Firstly, at the national level, it can be seen that the largest portion of survey respondents were locals (from Makana Municipality). This is followed by respondents from the host province - the Eastern Cape. This is to be expected as festinos from the Eastern Cape can easily make day trips to attend the festival. This is illustrated by the second map of Eastern Cape festino origins. In this case, after residents, people from the two large cities in the province, Gqeberha (Nelson Mandela Bay) and East London (Buffalo City) represented the largest portion of attendees from the province. A pattern of decreasing festino attendance then radiates outwards with distance from Makana Municipality with Chris Hani, Joe Gqabi and Alfred Nzo districts representing between 2 and 5 festival attendees each. Given the larger distances, it is less likely that people from these districts will undertake day trips to attend the festival. With this pattern in mind, a useful strategy to increase Festino attendance and consequent economic impact may be encouraging people from the surrounding Eastern Cape districts to stay overnight. The cost of accommodation in Makhandu may be a barrier for people from the Eastern Cape extending their stay from a day trip to an overnight visit.

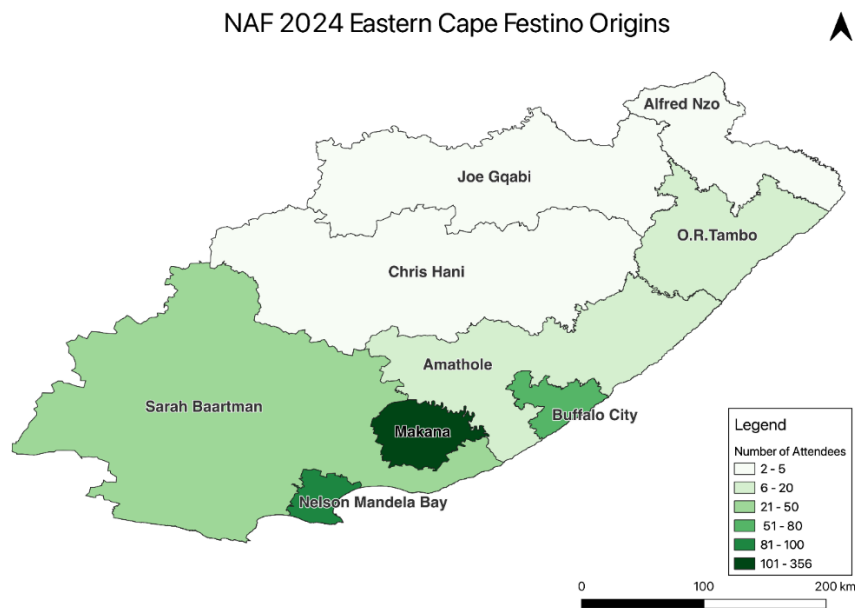


Figure 3 Map of Festino origins within the Eastern Cape

After the Eastern Cape, Festino origins reported by respondents are highest from the Western Cape and Gauteng, followed by KwaZulu-Natal. These are the provinces with South Africa's three largest metros. As such, these provinces have greater proportions of arts infrastructure and artistic activities with the knock-on effect of having audiences that support the arts. Relatively wealthy people who support the arts make the trip to Makhanda for the Festival. This pattern has been found in previous studies of the National Arts Festival. Given the popularity of the festival in these provinces, targeted marketing may be a useful strategy. Tours of festival shows may also find success in these provinces. Similar to the pattern found in the Eastern Cape, at the national level, the number of attendees per province tends to decrease with distance from Makhanda as travel time and costs of attending the festival increase.

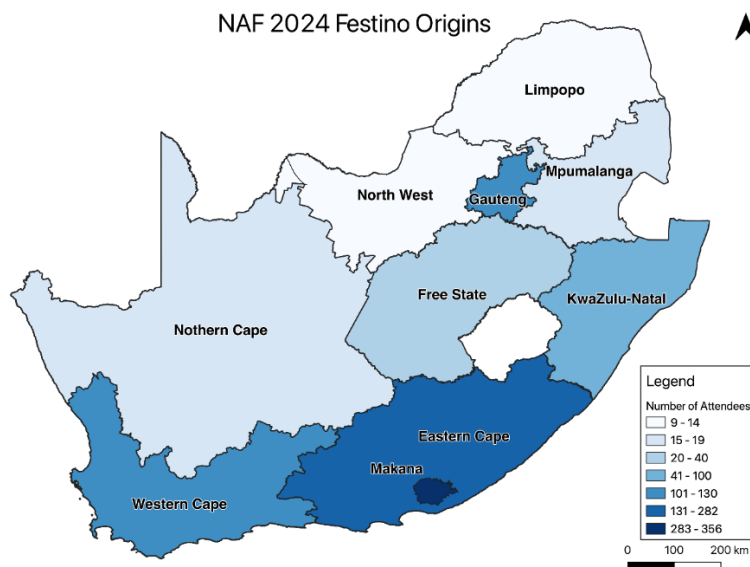


Figure 4 Map of Festino origins within South Africa

In 2024, responses to the interviews and the online survey had representatives from across the different age groups (Figure 4). While it is not possible to say to what degree the responses to the survey represent the festival populations, the larger sample size in 2024, analysis of the opinions and activities between age groups is possible.

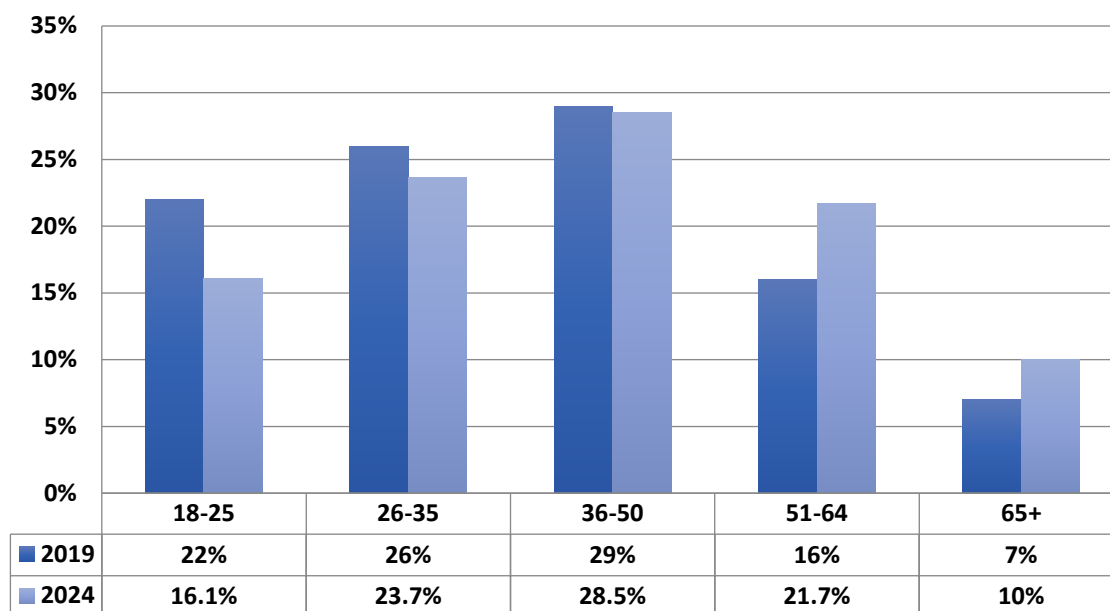


Figure 5 Festino Age Groups

As found in previous studies festinos who responded to the survey were employed (50.9%), or self-employed (21.9%), with students being the next largest group (13.2%).

Table 3 Festino Employment

Employment Category	2013 (%)	2016 (%)	2019 (%)	2024 (%)
Employed	40	45.8	44	50.9
Self-Employed	14	17	18.4	21.9
Student	27	15	25.6	13.2
Retired	7	13	7.6	8.7
Unemployed	3	2	2.7	4.5
Other	9	7.4	1.7	0.7

As found in previous studies, the education levels of festinos who responded to the survey were high (Table 4), with 75% of respondents to the 2024 survey having some level of tertiary education.

Table 4 Festino Education Levels

Highest level of Education	2016 (%)	2019 (%)	2024 (%)
Primary School			0.7
High School	12.8	26	14
Apprenticeship/ Professional Qualification	15	19	10
Diploma/Degree	37.6	31	36
More than one diploma/degree	34.6	24	39

Given the employment and education profile of respondents, reported household income categories were also quite high (Table 5). As expected, younger people generally reported lower incomes, while the highest reported incomes were in the 36-50- and 51-64-year-old age groups.

Table 5 Festino Monthly Income by Age Group

Monthly Income (R)	Age (%)				
	18-25	26-35	36-50	51-64	65+
< 5000	63	23	5	5	5
5001 - 10 000	34	37	12	9	7
10 001 - 20 000	11	37	31	13	8
20 001 - 30 000	4	30	29	24	13
30 001 - 40 000	3	18	40	24	15
40 001 - 60 000		16	36	38	11
60 001 - 80 000		13	32	38	17
> 80 000		2	46	39	13

4.2 Festino Activities

The average number of ticketed shows attended per person in 2024 by all visitors was 5.84 (4.5 for local residents and 6.5 for visitors), a decrease from the 2010 figures. There was also a fall in the number of free performances attended compared to 2019 (from 2.46 to 1.86). The average number of visits to the craft markets remained similar to 2019 (3.34) although the median number fell from 3 to 2.

Respondents were also asked how many ticketed shows they were attending on the day of the interview ("today"). As expected, visitors had a higher average attendance on the interview day (1.86) compared to local residents (0.90). Overall, festinos attended 1.53 shows on the day that they were interviewed in 2024, compared to an average of 1.88 shows per day in 2019.

The lower levels of participation in ticketed shows can be partly explained by a reduction in household incomes, and the shorter average length of stay (discussed below) which may also account for the decrease in attendance at free performances. The post-COVID National Arts Festival, while still offering a wide variety of shows on the Curated and Fringe programmes, is also smaller than in pre-COVID times, with fewer "headline" shows (large shows, like the symphony concert or ballet, and international artists).

Table 6 Attendance at Festival Activities

Average number attended (Median in brackets)	Locals 2024	Visitors 2024	Total 2024	Total 2019	Total 2016
Ticketed shows (median)	4.55 (4)	6.53 (4)	5.84 (4)	8.12 (6)	10.2 (8)
Ticketed shows attended "today"	0.90 (1)	1.86 (2)	1.53 (1)	1.88 (2)	2.2 (2)
Free performances	1.80 (1)	1.89 (1)	1.86 (1)	2.46 (2)	1 (0)
Visits to craft markets	3.84 (3)	3.08 (2)	3.34 (2)	3.36 (3)	1.7 (1)

The larger response rate to the 2024 survey allows some analysis of festino activities by age cohort (Table 7).

Table 7 Attendance at Festival Activities by Age Group

Average Number attended (Median in brackets)	18-25	26-35	36-50	51-64	65+
Ticketed shows	4.67 (4)	5.24 (4)	5.94 (4)	6.95 (5)	6.61 (5)
Ticketed shows attended "today"	1.2 (1)	1.44 (1)	1.56 (1)	1.76 (1)	1.72 (2)
Free performances	2.57 (2)	2.22 (1)	1.76 (1)	1.3 (0)	1.3 (0)
Visits to craft markets	4.13 (3)	3.8 (2)	3.22 (2)	2.89 (2)	2.3 (2)

Older festinos (51-64; and 65+) reported the highest number of ticketed shows attended (a median of 5 per person), but the lowest number of free performances (average of 1.3 and median of 0), and visits to the craft markets. Festinos in younger age groups (who also had lower incomes), went to fewer ticketed shows, but more free performances and visits to the craft markets (especially the youngest cohort in the 18-25-year-old group).

Analysis of activities by age group cohort thus revealed some interesting patterns, which can be summarised as follows, and are further discussed in the next sections:

Young, social and price-sensitive festinos (18-25-year olds): This group attended a lower average number of ticketed shows (4.7), but more free shows, and made more visits to the craft markets. They have lower incomes and spending than other groups (as further discussed below), and are most interested in the “vibe” and social scene that the NAF offers.

Active all-round festinos (26-35-year olds): This group was active across the board, with a relatively high number of ticketed shows attended (5.2 on average), as well as the highest average number of free shows (2.2) and the second highest number of visits to the craft market (3.8). They have relatively high levels of disposable income and are the group with the highest overall spending at the NAF.

Selective transitioners (36-50-year olds): This group attended more ticketed shows (5.9) but reduced free shows (1.7) and craft market attendance (3.2) compared to younger groups. Although they have higher incomes and spending than the very young festinos, their spending may be constrained by family and other responsibilities.

Older planners & show-focused festinos (51-64-year olds and those older than 65): This group attended the highest average number of ticketed shows (7 and 6.6 respectively) but were least interested in free shows and the craft markets. Although their incomes are not as high as the

working-age groups, their spending at the NAF is significant. Ratings across all categories of festival activities were lower for this group.

4.3 Festino Ratings

Festinos were asked to rate their Festival experiences in terms of value for money on a 1 to 5 scale, where 1 was 'bad' and 5 was 'excellent' (Table 8).

Table 8 Festino Ratings of Festival Experiences

Rating	Average Rating	2024				2019	2016
		1 and 2	3	4	5	5	5
Accommodation	4.03	8%	21%	30%	41%	39%	39%
Restaurants	3.9	5%	25%	42%	28%	24%	25%
Main/Curated Shows	4.2	4%	16%	35%	45%	45%	56%
Fringe Shows	4.1	5%	19%	37%	39%	38%	34%
Craft Markets	3.6	16%	27%	29%	28%	29%	28%

As Table 8 shows the generally high ratings obtained over the years have been maintained. 80% (compared to 86% in 2019) of festinos rated shows on the Curated (Main) programme as a 4 or 5 out of five. The same applies to Fringe show ratings, which, while having a lower average rating than Main shows (as was also found in previous studies) were rated as 4 or 5 out of 5 by 76% of festinos in 2024 (77% in 2019). Both these results suggest that the core aspects of the NAF have maintained their high standards in the post-COVID era.

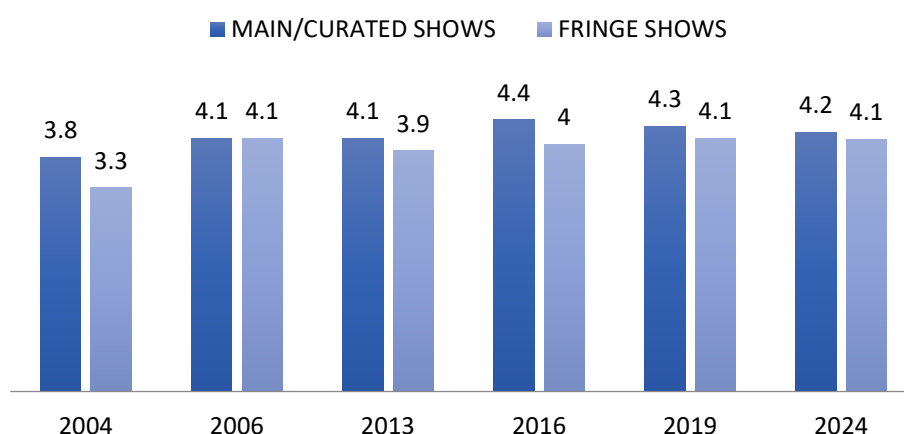


Figure 6 Historical Average Ratings (out of 5) for Curated (Main) and Fringe shows 2004-2024

Taking a more historical view (Figure 4) indicates the ratings for Main and Fringe shows, while always quite high, have increased over the last 20 years, since 2004. Average ratings for shows on the Curated (Main) programme have remained above 4 out of 5 since 2006, although declining slightly from the peak of 4.4 in 2016. Fringe show ratings are somewhat more volatile but have increased from 3.3 in 2004 to 4.1 in 2019 and 2024.

Festino ratings of craft markets declined between 2013, when 70% of festinos rated the craft markets as either a 4 or 5 out of 5 in terms of value for money and 2016 (63% rated craft markets as a 4 or 5). In 2019, 69% of festinos rated the craft markets as a 4 (39%) or 5 (29%) out of 5. In 2024, only 57% of festinos gave craft markets a 4 or 5 rating, with an average rating of 3.6 out of 5 (the lowest for any festival aspect rated).

Food and accommodation, while not directly in the control of festival organisers, is a key part of the overall festival experience for visitors.

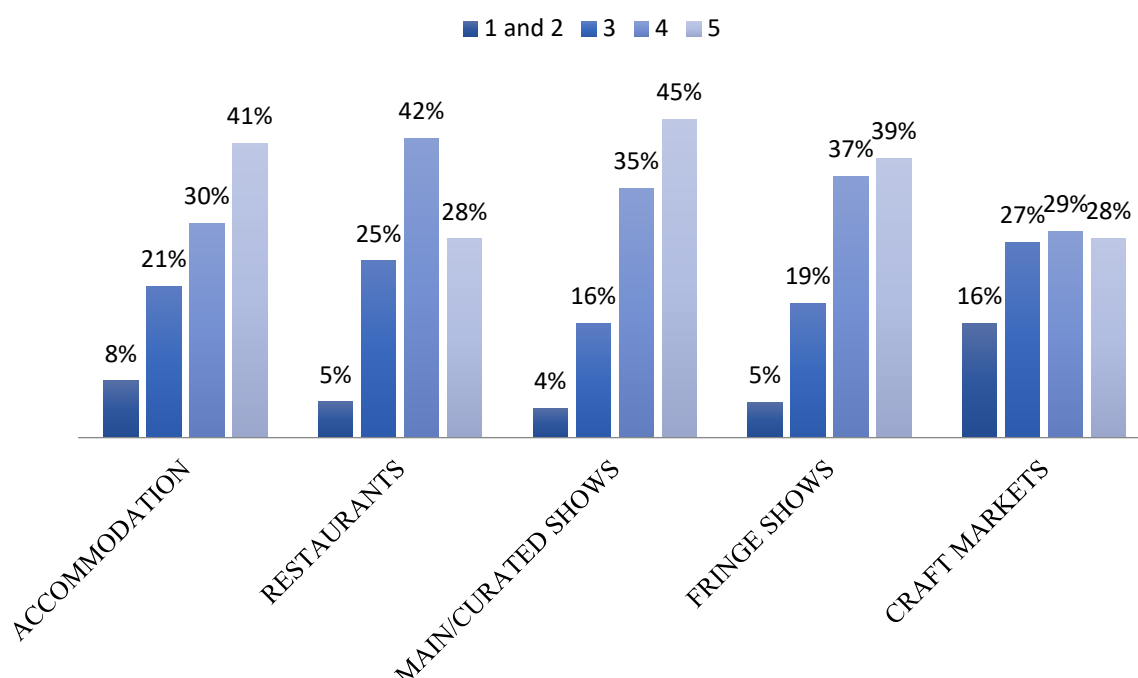


Figure 7 Festino ratings of festival activities in 2024

As shown in Figure 4, 71% of festinos who stayed in paid accommodation rated it as good (4) or very good (5), a slight decrease from 2019 (73% rated it 4 or 5). Only 28% (24% in 2016) of festinos rated restaurants as 5 out of 5, but a much larger percentage (45%) gave them 4 out of 5, with only 4% rating a 1 or 2, that is, poor or very poor.

However, in the additional comments made by visitors at the end of the survey, some issues relating to accommodation were raised: “Not enough marketing about getting tickets and there needs to be an easier way to get accommodation; the infrastructure needs to be improved” and in another comment, “Accommodation is too far from the core of festival.”

Table 9 Festino rating of Festival activities by age group (Percentage)

	Rating	18-25	26-35	36-50	51-64	65+
Curated	1 or 2	4	6	5	2	3
	3	16	17	14	15	18
	4 or 5	80	77	81	84	78
Fringe	1 or 2	3	4	6	5	5
	3	16	18	19	19	27
	4 or 5	81	78	76	77	68
Craft	1 or 2	12	9	16	19	26
	3	26	26	27	30	34
	4 or 5	62	65	57	51	41

Ratings by age group showed some interesting patterns:

- Curated shows were rated most highly by middle-aged people (36-50 and 51– 64)
- Fringe shows were rated most highly by younger people (18- 25)
- Craft markets were rated most highly by younger groups (18-35), but slightly lower by the very young group (18-25), which is potentially problematical (given their activity focus).
- Ratings reduced across all categories for the older festivalgoers (65+), especially for Fringe shows and the craft market

Table 10 Previous Festivals attended and recommendations

Year	Average number of previous Festivals	Recommended (%)
2006	4	99
2013	5.6	99
2016	6.7	99
2019	6.8	96.4
2024	8.9	92.4

The NAF has a significant cohort of loyal festinos, who attend the festival year after year. As shown in Table 9, the average number of previous festivals attended by people who completed the survey in 2024 was 8.9, rising steadily over the years.

Figure 5 shows this more clearly: 26% of respondents had attended 10 or more previous editions of the NAF, with 18% having attended 7 to 10 times before. There is also a new cohort: 17% of respondents were attending the NAF for the first time in 2024 (as compared to 21% who were attending for the first time in 2019), and a further 18% had been once or twice before. This shows that the NAF is both retaining visitors from before, as well as growing new audiences.

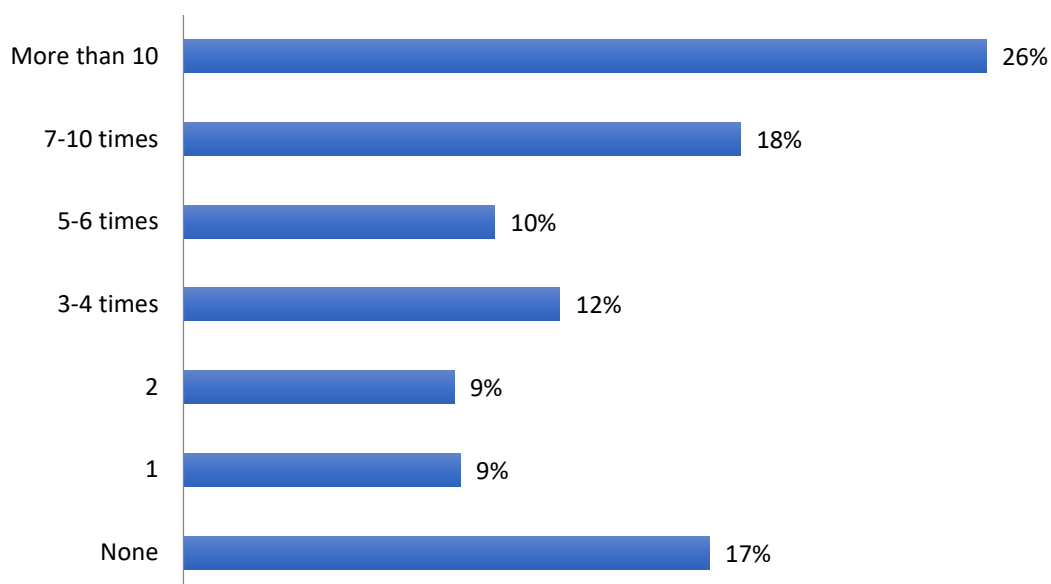


Figure 8 Number of previous editions of the NAF attended

Respondents to the survey were asked if they would recommend the festival to other people (Table 9). While remaining above 90%, the decline in respondents who say they would recommend the festival is of possible concern but may be related to changes made to the programme and festival organisation which audiences will take some time to get used to.

Analysis of recommendation by age group confirms this: 94% of younger festinos would recommend the NAF to others, falling to 89.7% of those 65 years and older (Table 10). However, since older festinos are those with more spending capacity and higher attendance at ticketed shows (which is an important source of income for the NAF, and vital for financial sustainability), attention should also be paid to the comments of the older cohorts (further discussed below).

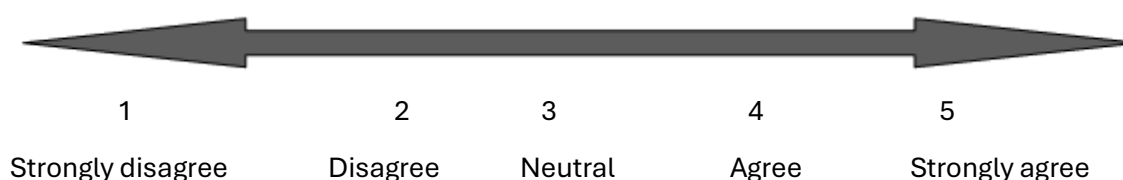
Table 11 Recommendation by Age Group

Recommendation	18-25	26-35	36-50	51-64	65+
No (%)	5.81	6.11	7.50	8.76	10.31
Yes (%)	94.19	93.89	92.50	91.24	89.69

4.4 Festino Opinions

As in previous studies, the NAF Festino survey included a section designed to measure the non-market socio-cultural impacts of the NAF. Based on the Edinburgh Festivals (2011) study, this section aimed to explore the impact of the NAF on things such as audience development, building social capital, and social cohesion.

The NAF surveys included statements about the value of the NAF to which Festinos were asked to respond on a one to five Likert Scale, where 1 meant “strongly disagree”; 2 meant “disagree”, 3 was “neutral”; 4 was “agree” and 5 was “strongly agree”. To make the scale clearer, respondents were provided with an information card, showing the following scale:



Important aims of the NAF are audience development, through widening access to cultural experiences and building social cohesion. The 5 statements posed to NAF audiences to evaluate the role of NAF in achieving these aims were:

- When I am at the Festival, I am more likely to take risks and go to shows and events that are new to me, and that I have not experienced before (Risks).

- The Festival gives me the chance to see artists and events that I would otherwise not be able to see (Access)
- The Festival increased my understanding of other cultures (Inter-cultural Understanding)
- The Festival is an event where people from different cultures and backgrounds can meet and talk together (Social cohesion)
- Festival shows have increased my understanding and enjoyment of the arts and culture (Enjoyment)

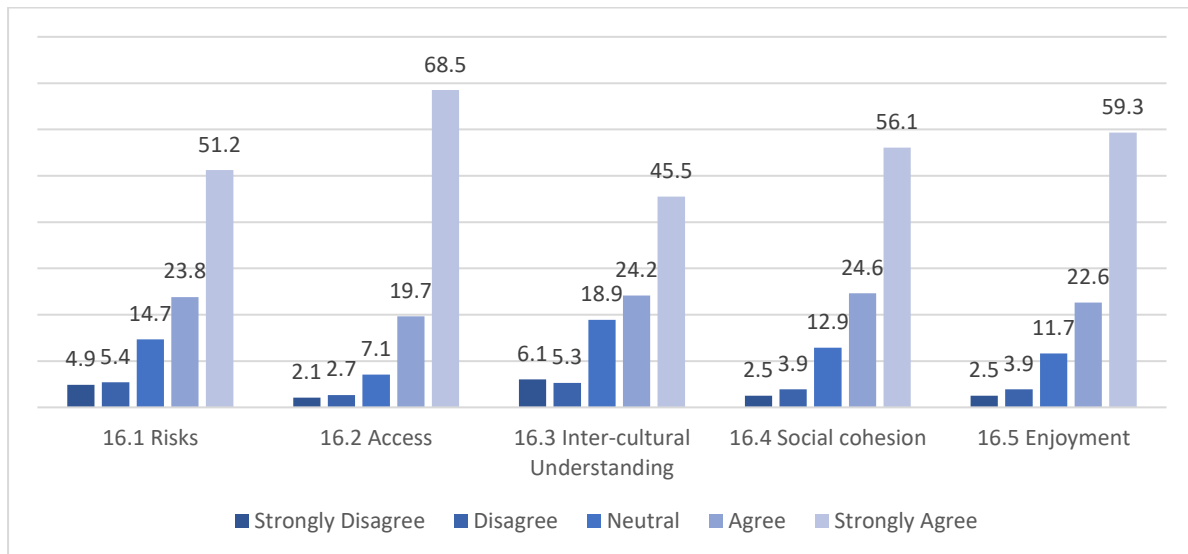


Figure 9 Festinos' opinions of the contribution of the NAF to audience development and social cohesion

As the results show, NAF audiences most strongly agreed that the festival increased their access to arts and culture which they would otherwise not have been able to see (88% agreeing or strongly agreeing with the statement). 75% of respondents also agreed or strongly agreed that when they are at the NAF, they are more likely to go to shows that were new to them, taking risks by attending shows and art forms that have not been experienced before. 82% agreed or strongly agreed that the NAF increased their understanding and enjoyment of arts and culture. These responses demonstrate that the Festival continues to play a vital role in giving audiences access to culture, encouraging them to try new art forms, and increasing their knowledge about and enjoyment of, arts and culture.

The NAF also plays a role in building intercultural understanding and social cohesion. 69.7% of respondents agree or strongly agree that the Festival increased their understanding of other cultures, and also that it provided a space for inter-cultural socialising (80.7% agree or strongly agree). This result concurs with the increasing diversity (in terms of the home language of festinos reported in Table 1) of NAF audiences.

To capture some of the broader value of the NAF in the year of its 50th Anniversary, a new question was added to the survey for those visitors who had been to previous editions of the Festival: Thinking back over previous visits to the Festival, what would you say are some of the

most valuable contributions of the National Arts Festival? Response categories were provided, and respondents could choose multiple options.

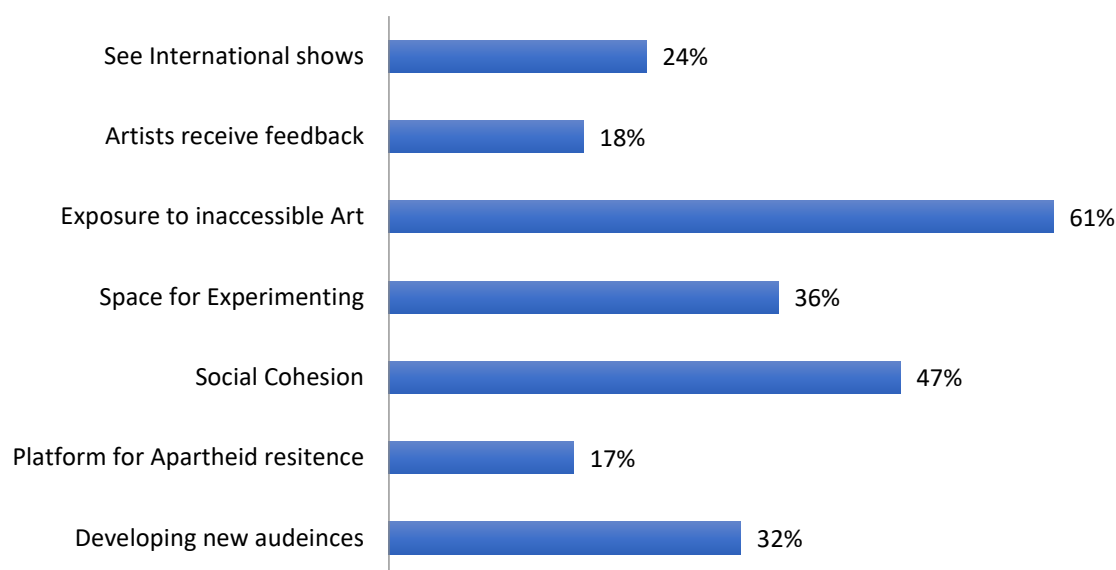


Figure 10 Contributions of the NAF over time

The most mentioned value was the NAF's role in providing an opportunity for audiences to see South African art and artists that may not normally be accessible to them (61%), echoing the findings of the opinion statements already reported. The second most chosen value was the social space that the NAF provides for people from different cultures to meet and share ideas – and so giving recognition of the Festival's role in building intercultural understanding. 17% of respondents recognised the role of the NAF in “providing a platform for resistance during apartheid and current political commentary”.

The value of the festival to the artistic ecosystem of South Africa was also recognised, with 36% of respondents choosing the importance of the NAF for “providing a platform for experimental and new approaches to the arts” and 18% recognised the Festival for providing a “place where artists can get feedback from audiences on the quality of their work”,

32% of respondents recognised the value of the Festival in “developing new audiences through involving young people in the arts”. About a quarter (24%) of people mentioned the importance of the NAF in enabling South African audiences to see international shows.

Finally, a direct question about the role of the NAF in connecting artists to audiences was included: On a scale from 1 – 10, where 1 is not at all important, and 10 is very important: How important would you say the National Arts Festival has been in connecting artists and audiences in South Africa?

The average response score to this question was 8.2 out of 10. As shown in Figure 8, 39% of respondents rated the NAF's role 10 out of 10, with a further 30% rating it 8 or 9 out of 10.

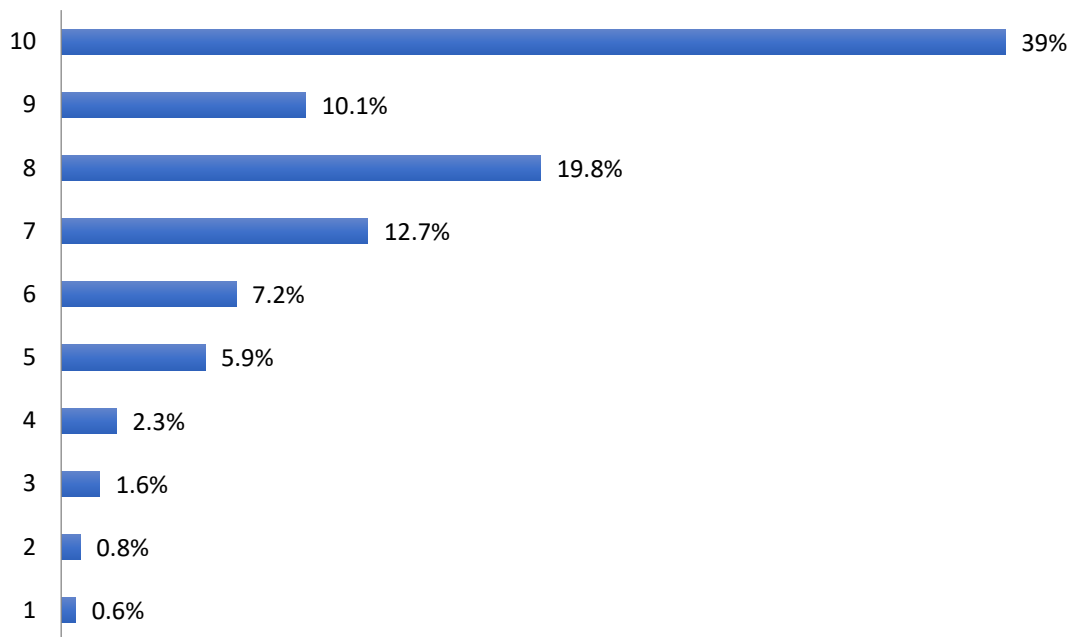


Figure 11 The importance of the NAF in connecting artists to audiences

4.5 Festino Length of Stay, Accommodation Choices and Spending

An important part of understanding the experiences of festival audiences (and their economic impact on the host city and province) is to investigate the time they spend at the festival, their accommodation choices, and their spending on other categories.

Table 12 NAF visitor average length of Stay 2016 - 2024

Average Length of Stay	2024	2019	2016
Days	4.2 (3)	5.6	6
Nights	3.4 (3)	4.7	5.3

As also noted by festival organisers, the average length of stay of visitors to the festival has been falling over time (Table 11). This is probably because lower economic growth rates (especially in the post-COVID era) have reduced household disposable income, which means visitors can afford to stay for less time. However, there were also several negative comments from visitors (and artistic producers) about the cost and availability of accommodation.

A related phenomenon is the increase in the proportion of day visitors (those who come for one day, or who may come for multiple days, but do not stay over in Makhanda). As shown in Figure

9, nearly a quarter of NAF visitors who participated in the survey were day visitors, and 22% stayed for only 2 to 3 days.

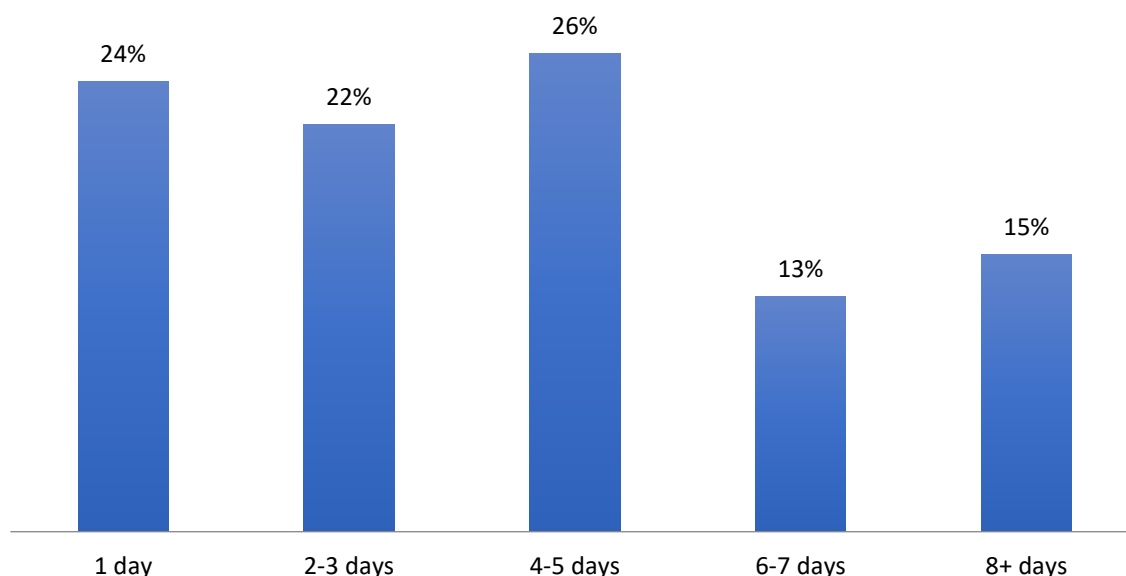


Figure 12 Number of days spent at the NAF 2024 by visitors

Accommodation types, for visitors who did stay over, are also changing over time. In particular, there has been a marked decrease in visitors staying in Rhodes University residences (from 20% in 2016 to 8.5% in 2024), and a rise in the proportion of respondents who stayed in a hotel or Bed and Breakfast, or in rented accommodation (which would include non-traditional rentals, like AirBnB).

Table 13 Accommodation types at the NAF 2016 to 2024

Accommodation Type	2024 (%)	2019 (%)	2016 (%)
Hotel or B&B	30.1	19	31
University Residence	8.5	15.1	20
School Hostel	4.6	6.5	6
Camping/Backpacking	0.9	2.2	3
Friends & Relatives	17.8	22.8	21
Rented house/Flat	14.1	12.3	9

Day visitor	23.9	19	7
Other	1.1	3.1	3

Respondents were asked to provide information on their spending at the Festival in Makhanda across a number of categories. Interview data has a higher reliability than data from online surveys because interviewers can probe answers given, and interviewees can ask for clarification questions. Spending averages were thus calculated from interview data only (Table 13).

As found in previous studies, the largest spending category for visitors was accommodation (an average of R5 894 per group, where the average group size (including those who reported spending just for themselves) was 2.1. Next most important was food and drinks (R1 403), followed by spending on tickets for shows (R1 119), shopping, including at the craft markets (R1 076), transport in Makhanda R435) and a small “other” category (R245). Total spending per group for visitors was thus an average of R10 172, which is R4 844 per person (compared to R3 841 at the 2019 NAF).

Table 14 Average spending per person and per group in Makhanda at the 2024 NAF (in Rand)

		Accommodation per group	Shows per group	Food & Drinks per group	Shopping per group	Transport per group	“Other” per group	Total Spend per group	Average Group Size	Average Spend per person
Visitors	Average	5894	1119	1403	1076	435	245	10172	2.1	4 844
	Std. Deviation	9893	2354	1939	1505	868	1402	17961		
Locals	Average		496	690	953	101	80	2319	1.6	1 449
	Std. Deviation		523	896	2038	215	281	3953		
Total	Average	5894	962	1230	1046	364	209	9704	2	4 852
	Std. Deviation	9893	2070	1770	1650	787	1248	17418		

Local residents were asked to report only spending in addition to their normal monthly expenditure. They spent an average of R953 on shopping, R690 on food and drinks, R496 on tickets for shows, R101 on transport and R80 on other things. Per group (average size of 1.6), local residents spent an average of R 2319 at the 2024 NAF, which works out as an average of R1 449 per person (compared to R 1634 per person at the 2019 NAF). The lower spending by

local residents may be a result of the constrained economic resources of many Makhanda households.

Table 15 Average visitor spending at the 2024 NAF by age group

	Accommodation per group	Shows per group	Food & Drinks per group	Shopping per group	Transport per group	Other per group	Total Spend per group	Group Size (average group size)	Average Spend per person
18-25	3364	853	789	648	216	62	5933	2.3	2 580
26-35	7156	1089	1637	1137	335	211	11566	1.8	6 497
36-50	5272	1266	1600	1085	461	95	9779	2.2	4 437
51+	6091	1197	1369	1267	670	553	11147	2.2	5 171

Analysis of visitor spending (not including local residents) show some expected variations. The 18-25-year-old group have the lowest spending per person (many still being students), R2 580. The group with the highest spending is the 26-35-year-olds, R6 497 per person. From the point of view of financial impact, it is thus important to keep attracting this relatively young, high spending age cohort. Next most important are the older festinos (51+) with an average spending of R5 171 per person.

Table 16 Additional spending in Eastern Cape of NAF visitors

Category	Amount
Non-EC Festinos who reported spending in EC	20%
Average spending per group	R 4111
Average additional days stayed in EC	2.9

The survey also asked festinos who did not normally live in the Eastern Cape if the festival was their main or only reason for visiting the province. The vast majority of NAF visitors (87%) were only in the Eastern Cape because of the Festival. Of those, 20% reported staying in the Eastern Cape before or after their visit to the NAF for an average of 2.9 days. Excluding the amount they spent at the NAF, visitors who stayed on in the province reported additional average spending of R4 111 per group.

4.6 Additional Comments from 2024 Festinos

The last part of the survey asked respondents if they had any other comments about the Festival that they would like passed on to Festival organisers.

Positive comments from NAF Visitors and Local residents of Makhanda

Many visitors valued the cultural significance of the festival and its contribution to promoting the arts: *"I am forever grateful for this Festival. The arts are such an important space for political commentary and of course the extension of compassion towards one another"; "Thank you for creating a platform for small theatre companies to showcase their brilliant work."*

Visitors also commented on the quality and variety of performances, highlighting specific shows they liked and appreciation for the overall experience: *"I enjoyed every moment, and I would like to come and pay a visit again"; "Great work. Good to have it back. Excited!"*

In the economically challenging post-COVID environment, there was an appreciation for the efforts of the organizers and staff in keeping the festival going: *"Thank you for keeping the festival going. It's an essential platform for South African musicians, artists, and actors to connect and display their artworks."*

Both residents and visitors acknowledge the *Community and Economic Impact* of the Festival. Locals acknowledge the economic benefits of the festival for the town but express concerns that these benefits are declining. There are mentions of high stall fees, fewer vendors, and a lack of support for local businesses. From visitors, there is a strong call for more inclusivity and community involvement, particularly by involving local businesses and residents. *"A suggestion [is] to involve the local community of Makhanda, both the businesses and residents. It would make the festival more inclusive and accessible in terms of shows in the townships and not just in [and] around the CBD."*

Challenges and areas for improvement identified by Visitors and residents of Makhanda

Many visitors feel that there is a lack of *effective marketing* for the festival. Comments suggest more aggressive advertising on television, radio, social media, and even in schools in rural areas and townships, targeting both national and local festinos. One festino commented: *"Festival needs more advertising. I didn't see a single advert anywhere in Johannesburg."*

Both visitors and residents commented on the lack of a *vibrant, festive atmosphere* that was present in previous times. Some visitors mentioned that there were fewer street performances, live music, and overall engagement. The Village Green has become less lively and needs revitalization. For example, one respondent commented that: *"I miss the mime artists, buskers, stilt walkers, etc who used to bring music, laughter, and joy in and around the festival areas - and gave some income to needy artists"*, while another wrote: *"Please boost the craft market scene for next year. Many local Eastern Cape people would visit for a day and take in some art galleries and perhaps come back for shows if there was a better atmosphere. The village green used to be the heart of the festival, where theatregoers and artists would mingle. It feels underwhelming and uninspiring at the moment."*

While comments about the lack of a festive atmosphere were made by both younger (less than 35 years old) and older festinos, younger groups expressed more concern about the lack of "vibe" compared to older attendees, making comments like: *"Bring back the vibe."*; *"The festival is much smaller than previous years which is sad."*; *"Have the pre-COVID buzz and the ability to filter free shows on the website."* Older festival-goers do mention the decline in atmosphere, but their focus is often framed within the context of what they see as the Festival's overall

decline in quality, and nostalgia for how things used to be, rather than a specific emphasis on the "vibe." They are concerned with structural and organisational issues that affect the Festival atmosphere but do not necessarily link these issues directly to a lack of "vibe" as younger festinos do. For example, one older festino commented: *"Disappointing outcome. What happened to NAF being vibrant, big, and inspiring?"*

Although not always in the power of Festival organisers to influence, visitors did comment that there are challenges with the *infrastructure and logistics* of the event, including poor road conditions, insufficient signage, lack of clear directions to venues, and the need for a printed program or daily guide. Some visitors found it difficult to navigate without these tools. More accessible maps, clear boards for directions, and more organized shuttle (hopper) services between venues were suggested for future editions of the NAF. Although acknowledged as not in the control of the Festival, the state of the town does affect the Festival experience. As one visitor put it: *"The Festival was great, I would have loved to stay longer but Makhanda is in really bad shape. It is very sad to see"*. Others commented unfavourably on some Festival venues: *"The state of some venues is not pleasant, particularly City Hall... We have to pay R2 to get into a toilet that is filthy and uninhabitable."*

Both visitors and local residents commented that the *online platform and lack of a printed programme* were problematic for some. The shift to digital-only formats for programs and booking has been a point of frustration for both younger (under 35) and older festinos. Some festinos miss having a printed program that they can easily browse and use to navigate the Festival and take home as a souvenir. *"Please bring back the printed show booklet. It was extremely difficult navigating through the website for shows."* A younger festino commented: *"Printed programmes would enhance the experience and make it far easier to navigate and make ticket-booking decisions."* While an older festino commented: *"I really miss the printed programme. It was a way of bumping into shows that just doesn't happen on the website or app."*

5 Artistic Producer Survey

5.1 Demographics of Respondents

As discussed in the methods sections, the artistic producer survey used two data collection methods. During the NAF 2024, two (2) focus group discussions with artistic producers in Makhanda were conducted. For the Focus Group Discussions (FGDs), there were 24 participants with a fair distribution of emerging and established producers. The term artistic producer is used in this report to describe anyone who creates, performs, directs, exhibits, and produces a work of art consumed by the audience during the NAF 2024. Regarding the online artistic producer survey, there were 76 respondents. Of the 76 respondents, 51 were males, while 23 were females. Two respondents preferred not to disclose their gender.

The artistic producers were also asked to identify their race, age and level of work. Notably, most producers who responded to the online survey were black artistic producers, accounting for 57% of the total respondents. In contrast, white and coloured artistic producers accounted for 30% and 8%, respectively. 5% of the total respondents preferred not to disclose their race. This aligns with the demographics of the FGD participants. A wide variety of artistic genres were covered by producers in the survey, including theatre (45%), Music (19%), Dance and Physical Theatre (17%) and Comedy (8%).

Table 17 Artistic Genres of Artistic Producers Surveyed at NAF 2024

Show Type	Percentage	Number
Theatre	45%	35
Music	19%	15
Dance & Physical Theatre	17%	13
Comedy	8%	6
Other	6%	5
Visual Art	4%	3

The Festival programme is divided into the Curated and Fringe sections. For the online producer survey, respondents were asked to provide information about the phase of their professional development and the section in which they were programmed. Most of the respondents were on the Fringe festival stage with 35 identifying as emerging while 33 said they were established. On the Curated programme, only one (1) respondent belonged to the emerging category while seven were established artistic producers.

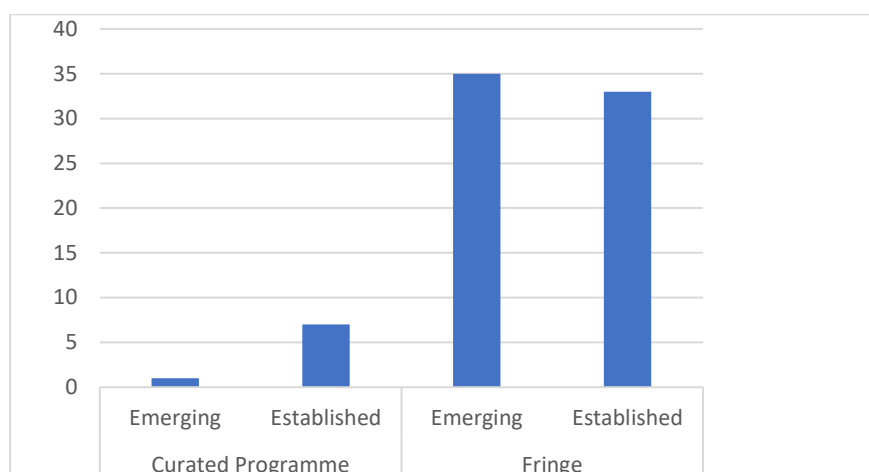


Figure 13 Phase of Professional Development and Programme Section of Artistic Producer respondents

In terms of the age distribution, there were 10 respondents who belonged to the 18-25 category; 23 belonged to the 26-35 category; 28 belonged to the 36-50 category while 12 belonged to 51-64 category. One (1) respondent chose not to disclose their age. This explains the higher number of established artistic producers over the emerging group among the respondents.

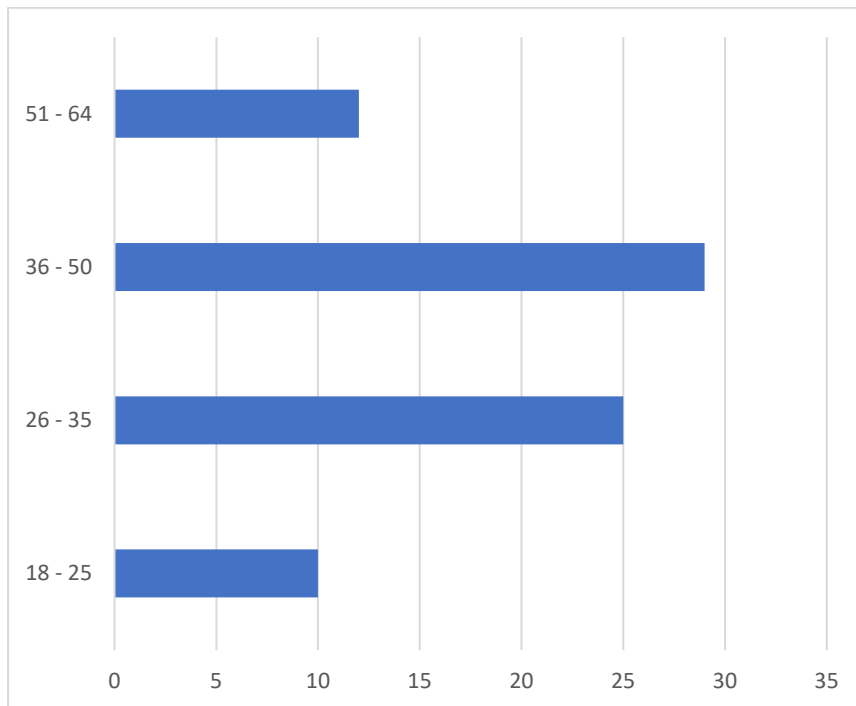


Figure 14 Age groups of artistic producers who responded to the NAF survey

5.2 Social Contribution of the NAF

Measuring the social contribution of festivals to host communities and the value festivals add to people is challenging. One way of measuring this contribution is by speaking to host communities, artists and producers and understanding the social value systems they assign and attach to festivals. Regarding the National Arts Festival (2024), artistic producers who participated in the two focus group discussions observed that socially, the festival created a family aura and togetherness for Makhanda. The festival provides a space for revitalisation, meeting new people, and connecting. One respondent in the FGDs noted that they look forward to the festival because it generates vibes and energy through music and food.

“I grew up here, and I remember looking forward to coming to the Festival, the energy, the vibe before the content. That’s the vibe, the music, the food, the Village Green, everything. All this contributed to it being a nice festival.”

To some artistic producers, the NAF is a place that invokes and inspires creativity in the city and when they return to their working spaces. One respondent noted,

“But also what it does to the spirit is you go back to your own spaces, revitalized, and influenced. I mean, you mentioned an important thing there that you’ve learned. It’s so much that it shifts and agitates the way of doing things and stuff, and you are influenced by other people”.

The underpinning observation from these responses is a feeling of togetherness, networking, sharing and experiencing what other artists and visitors bring to the Festival. Local artistic producers from Makhanda see the Festival as a meeting space for the whole town. In contrast,

artistic producers from other provinces view the Festival as a place for networking and a space to watch and engage with artistic products. One respondent from the FGDs noted that:

“Maybe for me, I think this is how I learned about the Festival, [and] how it operates. You apply, it’s not the Festival, [it] doesn’t invite you, you invite yourself, meaning that it’s not only the festival [organisers] that brings it to life, it’s the artist who apply to say, I want to do a show. They apply to the process. They pay the registration fee. They must fundraise, whether they get R10 000 or R50 000, whatever, so they come to present their show”.

Another respondent from the FGD interview noted that,

“But for me, What I take from the Festival, you meet people, visitors, and people who are lovers of art come to the city to enjoy art. But at the same time, the Festival can easily shelter the struggles of Makhanda in those 11 days.”

While the Festival space created a positive ‘vibe’ and space for engagement and sharing for both local and visiting artistic producers, challenges were observed and raised.

One of the challenges relates to the legacy development and contributions of the Festival to the local (Makhanda) artistic producers and the community. One local FGD respondent voiced the opinion that local residents are not involved enough in the Festival:

“But I have been asking myself, what does NAF do for Grahamstown’s people? Because I feel like national aspects should be national. Makhanda people should be in charge...Because National Arts Festival it’s been 50 years now. It carries a lot of our history, but they know, but they know nothing about the National festival. There are people who are born here, brought up here, but they know nothing about the national festival.

Including local residents and producers more is important to keep the sedimented history of the Festival alive through skills, knowledge and experience sharing. A key interpretation that can be derived from this observation is a need for a shared understanding of the perceived and actual roles between the community, artistic producers and festival management to build a sustainable future for the Festival and the community and local artistic producers.

5.3 Development and Networking platforms for Creative Producers: Connecting to new and old audiences

The creative arts ecosystem operates on networks, peer affirmations and referrals. Although there might be minimal exceptions here and there, within the festival spaces and circuits, networking and peer approvals are key to marketing works, generating audience interest, excitement and endorsements for other opportunities linked to the Festival. Artistic producers were asked several questions related to networking opportunities that the Festival offered or created for them.

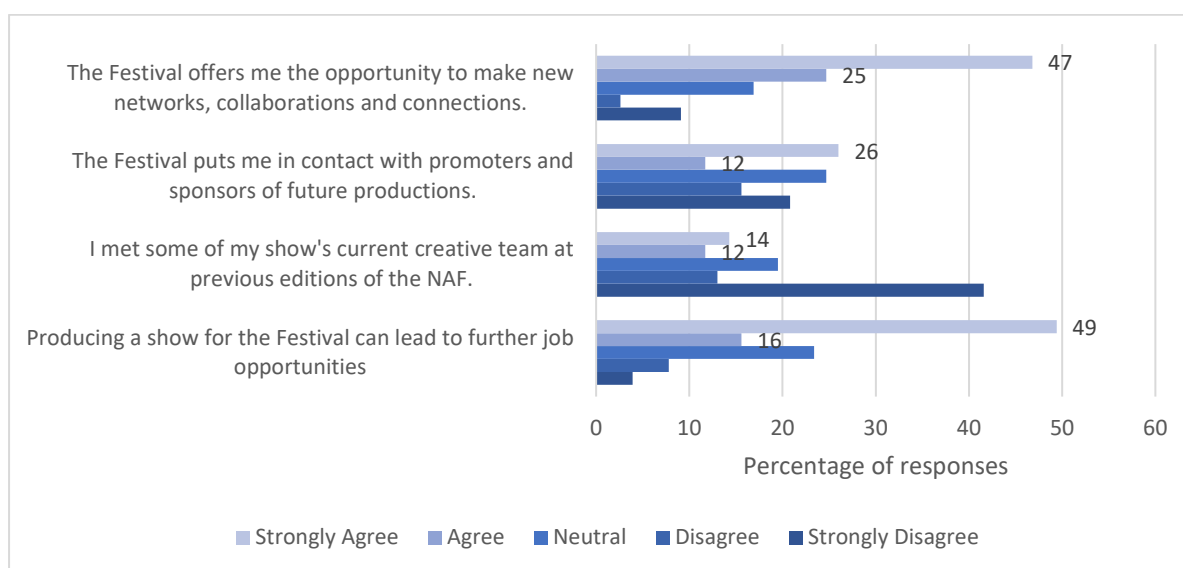


Figure 15 Networking and Connections for Artistic Producers at the NAF

On a score of 1 (one) to 5, with 1 indicating that they strongly disagreed and 5 (five) that they strongly agreed, artistic producers were asked if the festival offered them opportunities to make new networks, collaborations, and connections. As results to the online survey show, 47% of respondents strongly agreed, and a further 25% agreed that the NAF offered artistic producers the opportunity to make new networks, collaborations, and connections, echoing the 88% of respondents who answered “Yes” to the question “Has presenting your work at NAF enabled you to make new networks, collaborate, and make connections?”. The NAF also scores well in terms of the 65% (49% strongly agree, and 16% agree) of producers who agreed that producing a show at the NAF could lead to future job opportunities. 38% of artistic producers who answered the survey also strongly agreed (26%) or agreed (12%) that the NAF played a role in putting them in contact with promoters and sponsors for future productions. This was in line with the responses from the FGDs, where respondents felt that the NAF provides spaces and platforms for development and networking between artistic producers and their targeted audience groups. Respondents in the FGDs agreed that performing, producing, directing or exhibiting at NAF was synonymous with a rite of passage, which acts as an approval stamp for their work. One respondent noted:

“I think from an artist or from a creative’s point of view, it’s a rite of passage thing. If you are a person that grew up involved or knowing that you want to be involved in the creative arts, the National Arts Festival is one things you know [you have to do]... [If you can produce at the NAF] you can do anything. You can take me anywhere. It's almost like a stamp of, yeah, you are a South African artist, and now you perform with every big South African artist that has ever performed in the stages [at the NAF]”.

This statement highlights how the NAF is seen as a significant milestone in an artist’s career, providing a sense of accomplishment and validation. The observation that one becomes not only an artist in their spaces but a South African artist by producing and presenting at the NAF highlights the role of the Festival in not only building an artist’s national standing but influencing and shaping the national artistic landscape.

The NAF was identified as a motivation for creators to explore and create new works, and to develop their own artistic careers, with some artistic producers noting that they started attending NAF as students and have transitioned into independent performers, directors and producers while performing on multiple stages at NAF. One respondent noted that

“It was actually the NAF that gave me the platform to first do that [performance] because it gave me the reason to actually create in the first part. Because of that, so many doors opened for me because of that. Just to perform where you are valued and to have a platform where art is valued and where audiences are there.”

This significant role played by NAF in inspiring creativity is reflected in the rating responses by artistic producers to the inquiry: “The festival enables me to take creative risks.’ As seen in the results, on a scale of 1 to 5, with 1= strongly disagree and 5=strongly agree, 51% rated NAF at 5 and 20% rating the Festival at 4.

Table 18 Artistic Producer opinions on the role of NAF in shaping output

	Strongly Agree (%)	Agree (%)	Neutral (%)	Disagree (%)
The Festival enabled me to take artistic risks	51	20	17	12
The success or failure of a production at the Festival provides me with an indication of how well it will be received outside the Festival context	40	22	22	16
Putting on a show at the Festival is important for improving my profile and reputation.	64	17	16	3

Artistic producers in the FGDs appreciated the NAF for bringing audience members to one place, which created diversity and inclusion, where everyone feels “included, everybody is valued, everyone is equal and there is a seeing of each other.” The NAF was characterised as a “melting pot” creating “excitement of what each strand is bringing.” This positive characterisation could be why 92% (71) of the respondents to the online producer survey would recommend that other artistic producers present their work at the NAF.

In addition to the reasons provided by the FGDs, the online survey asked artistic producers if showcasing their work at the festival enabled them to make new networks, collaborate, and make connections. 83% (64) of respondents agreed that the NAF had amplified their professional careers by providing platforms and spaces to present their work, and 88% of respondents positively noted that the NAF enabled them to make new networks, collaborate, and make new connections.

For most artistic producers, the NAF provided a national space where most producers looking for talent and new productions come together into the same space. Because the Festival is a national event, artistic producers observed that they can connect with audience members from all over the country who follow up on their productions when they get a chance to perform in places closer to where they come from. One artistic producer noted that they had met audience members while on tour around South Africa who could identify them by linking their work to the NAF:

“People will say, oh! We saw your show at the NAF. What are you guys doing? We have people that are following us on everything. They are constantly engaged with our work because they saw our work at the NAF. In terms of that, the Festival is a great platform and opportunity for us to grow our audiences”.

The online survey respondents also highly valued the artistic standardisation and authority stamping by NAF of works produced and presented at its festival editions. Responding to the rating question, “The success or failure of a production at the Festival provides me with an indication of how well it will be received outside the Festival context”, 46.8% gave a 5 rating, while 24.7% gave a 4 rating. This gives the NAF a collective positive rating of 71.5% by artistic producers.

Notwithstanding these positive responses and the positioning of NAF as a space that allows for networking at multiple levels, it is important to look at the negative responses that highlight dissatisfaction with how this role is fulfilled. This could also be highlighted by the responses of the artistic producers in the FGDs, who observed that the Festival could do more to facilitate meaningful and effective networks between South African artists at one level and with international artists at another level. A respondent from the FGDs notes that the Festival seems to have become exclusive and less accessible over time;

“It does feel removed from a certain part of the audience. It's very much happening on the side. It feels like it's for certain people...that's just the sense that I got a little bit. I remember growing up when I used to come to the festival, and it feels for me such a different experience because you would be walking around everywhere around town and literally bumping into people. Literally, what you said of meeting all these different types of people is stuff that was happening in the streets. It was just like there was just so much more culture in it as opposed to now.”

This sense of disconnection and individualism was evident in a number of the contributions by different respondents, with most linking these challenges to cultural brokering, funding, and absence of the Artist Pass (which allowed artistic producers to watch shows on the Fringe for free) as a hindrance to networking and collaboration. Artistic producers observed that the 2024 NAF edition did not offer artistic passes to enable them access to watch their colleagues' work. A respondent in the FGDs retorted that they had a “[...] bone to pick, but in previous years, there used to be something called Artists Pass, where artists could go and watch other Fringe shows, connect with other people. This year, that has completely gone”. Cultural brokering is the act of bridging, linking, or mediating between groups or persons of different cultural backgrounds to reduce conflict or produce change (Jezewski, 1990). While the respondents acknowledged the challenges that the NAF faced and still faces due to the COVID-19 pandemic, they reminisced about how the Festival, in pre-COVID years, used to effectively connect artistic producers with

their peers and prospective audience members. The Artist Pass, for example, was an effective way of networking and connecting. Respondents also raised another networking level that they perceive the NAF needs to create for their growth and development. One respondent submitted that the NAF needs to organise a networking platform with possible arts and culture funders during the festival.

“[...] I think there is a lack of activation with regards to accessing funders of the arts, whom the National Arts Festival has a good number of, but they just keep them up there at the funders’ cocktail with the CEO and the Board of NAF. The artists themselves then do not get to network with say, the British Council or BASA or Standard Bank, but they are all here”.

The desire to interact with funders during the NAF was a key theme that emerged in both FGDs with artistic producers. Most who have been on the Fringe programme highlighted that they were not sure what funders wanted from funding applications, which funders were open to funding projects for the NAF and the funders’ value propositions. A key observation from the artistic producers is that they only view networks and collaborations positively if they manifest in economic (financial) terms. As such, while they may make networks and collaborations in their social engagements during and after the Festival, they have challenges regarding initiating and maintaining collaborative networks with funding organisations and businesses to sustain their work at the NAF.

5.4 The NAF as a Space for Social-Cultural and Political Dialogue

Because national festival spaces always bring together government officials, policy advisors, administrators and managers, artistic producers usually create works that initiate dialogues and discussions on various issues affecting their work, growth and development. Artistic producers in the FGDs noted that NAF has served as a stage for exploring critical social and political themes over the years, highlighting that the festival has been a forum for challenging the status quo and discussing issues such as race, inequality, and cultural identity. Respondents in the FGDs noted that:

“[...] We talk about how this arts festival, we talked about how we can look at it and see what the state of the nation is”.

“[...] That was one part. I think that's quite important because part of the work, even if we proclaim or not proclaim, it does have a critical reflection of where we are and where we sit as a nation, as individual, as a collective, and where we see ourselves in a way. That's for one part. And the other part, it links to what you just said, the speaker

[...] If you look closely to most of the art forms, it becomes a reflection of [the] multi diverse society that we see that we are. Then on the other side, when you come here, it is like a journey that you've been to 100 places in five days. You've been in 100 places in five days because you see different things that is a reflection that tells something”.

When you come here, it is like journey that you've been to 100 places in five days...because you see different things that is a reflection that tells something" (Artistic Producer, NAF 2024)

This view that NAF has over the years been a site that provides space for productions that critique and reflect on the socio-political realities over the years finds resonance in the artistic producers' online survey

responses to the question "What makes the festival special to you?" One respondent retorted that the festival "is a place to test the temperature of the arts nationally, [...] It is a meeting place and a space for dreaming new projects and possibilities.". Another respondent noted that NAF "is the melting pot of all arts and a clear indication of what's happening on the art from in South Africa, where it is inclusive and not discriminatory in any shape or form. We fostered our for the arts through the early years of the festival." The NAF's visibility and reputation show that it has the potential to influence broader cultural policies and practices in South Africa.

The NAF has contributed to broader national and international dialogue on these issues by bringing together artists and audiences from diverse backgrounds. A generally agreed observation among the respondents of the FGDs was that over the years the NAF has been a reflection of different parts of society and different countries. One respondent submitted that:

"Then when you're coming here, you've met someone from Limpopo, Europe, someone from Mozambique, you've met someone from Greece. Then they are presenting something that is unique, that tells their story or the story of their society. Now it becomes quite a tour. A tour that is a well told. It is just hosted here in [Makhanda]. It's quite a journey coming to the Festival. I think to me, it's very, very important."

This reflects how the NAF is perceived as not only a national but international festival that successfully creates space for both national and international artists, contributing to its prestige. This is aptly affirmed by one response from an FGD respondent who observed "Currently, I think it's one of the festivals that really, really had that sense of the multicultural and international. That is not driven by a particular language. That's also quite important, I think. For me, those are quite important things." Yet, in these observations, there is also a nostalgic longing for yesteryear Festival editions that openly encouraged sociocultural and political dialoguing.

5.5 NAF as a National Platform for Artistic Development

The NAF has been credited with enhancing the skills of artists, particularly younger generations, by allowing them to learn from peers and more experienced artists. Several producers in the FGDs and in online survey responses talked about how attending and participating in the Festival influenced their craft, expanding their perspectives and pushing them to refine their work. For instance, one respondent in the FGDs submitted that the Festival influences artistic practice beyond the event itself:

“But also what it does to the spirit, you go back to your own spaces, revitalized, influenced. I mean, you mentioned an important thing there that you've learned It's so much that it shifts and agitates the way of doing things and stuff, and you are influenced by other people. I think for me, that's quite important. It's a rare thing”.

Another respondent, providing a long trajectory contribution by the NAF to their development and growth, notes that “I have literally benefited from this NAF experience being involved from 2005” while another respondent highlighted that they have benefited on multiple levels, first as a student crew and then as an artistic producer,

“Now, I'm saying that since now I grew up the Festival since 2006, till 2010, exhibiting as a crew student and then as a solo artist, I remember being aware of this category and working hard to be on the Main [programme] to try to find out when I apply, when I propose, when I submit it [my portfolio]...The portfolio must show the quality of work that I would be bringing”.

Beyond the artistic skills that are developed, artistic producers also gain soft skills, administration and managerial skills that become pivotal in their continued success in applying to present their works at the NAF considering that it has always been and is a competitive creative space. A key component to highlight here is how NAF has provided a space for progression for some of these artistic producers from when they were students or emerging artists to the current moment when they are considered established. Most of the artistic producers in the FGDs associated their artistic development over the years with their work presented at the NAF. In the online survey, 64 % of the respondents strongly agreed that the NAF had played a role in improving their profile and reputation.

5.6 The Financial Aspects of Producing at the NAF

While presenting and producing work for the NAF stages provides multiple social and artistic benefits, artistic producers noted several challenges regarding the cost of taking a production to the Festival. Most artistic producers agreed that the Festival provided a centralised platform for audiences from across the country and world to access the works. Since most of the productions are ticketed, it is perceived that artistic producers who present their works at the NAF would, therefore, make a profit from ticket sales, which was not always the case.

However, artistic producers who participated in the online producer survey were generally satisfied with the overall benefits of producing a show for the Festival. 61% of respondents agreed or strongly agreed with the statement that “The overall benefits to me and my show of producing a show for the Festival outweigh the financial cost (even if my show makes a loss)”.

This rating, however, highlights a challenge that respondents in the FGDs ventilated. While on a creative and artistic level, the NAF, as has been discussed in this report, has over the years excelled, which could underpin this rating, the direct economic (financial) benefits have not been fully realised by all artistic producers. There was a feeling that while NAF is an important cultural event, it does not always translate into financial or professional growth for artists, especially those who struggle to secure funding or are not part of the Main programme, particularly for artists from rural or marginalized communities. This finds resonance in the 60% of artistic producers who responded ‘No’ to the question “Did your Festival production receive

any financial sponsorship or assistance this year?”. If a high percentage do not get funding to produce their artistic work at the NAF in 2024 and the financial returns are not tangible, they will struggle to break even.

Consequently, most FDG respondents were critical of the NAF’s financial model, especially for producers and shows programmed for the Fringe stages. While the FGDs sought to elicit from artistic producers their experienced view on the social, cultural and economic significance of NAF over the years to the cultural and creative sector in South Africa, it seemed to the producers that the social and cultural were attached to financial returns. One respondent observed:

“[...] I have been thinking for myself how to think about ourselves as artists in almost a business sense because we don’t get paid by the hour. We get the hour on stage and the 100 hours that are not paid for offstage. It’s very different model. Then in that 100 hours, there is sitting and the feeling to get to the social elements. It’s just a really interesting thing that I am struggling with because I feel like I need a framework to understand, to make it sustainable so that I can get here, pay to get here, wait till afterwards into July to get ticket sales, to get the money”.

While genuine concerns are raised here, a more significant concern becomes apparent — from this shared understanding that artistic producers create work specifically for the NAF and expect the Festival to earn enough to cover all the production costs. Yet, as noted, most of the respondents in the online survey and FGDs were on the Fringe programme, which lays the production costs, staging and running the productions squarely on the producer. The assumption here is that there is a transactional relationship between the artistic producer and the NAF where the producer creates, stages and runs the performance or visual exhibition, and the NAF is expected to provide a profitable financial mechanism to the artists.

What can be gleaned as well from the FGD responses is that artistic producers have huge expectations regarding ticket sales based on their pre-COVID experiences and are worried about the lack of foot traffic and integration of the Makhanda community as a whole into the Festival as this relates to loss of revenue to them. One respondent noted, “[...] I think the whole prospect of their [NAF] having less and less foot traffic every year is something of a concern for us as artists, generally, because we might love National Art Festival because of the sentiment that we have a National Arts Festival.” The co-relationship between the lower number of festinos year on year seemed, to artistic producers, to indicate that there would be lower ticket sales. As reported in the next section, ticket sales at the NAF have declined compared to the pre-COVID period for a number of reasons.

The online survey asked artistic producers to estimate their production expenditure costs in Makhanda (not including pre-production spending that may have taken place elsewhere). Results showed that the average production expenditure was R22 167, with the largest spending category being accommodation, followed by venue hire. Spending by established producers was slightly higher than for emerging artists. Despite much discussion in the focus groups about the costs of staging a work at the NAF, the 2024 production spending was very similar to what was report in the 2019 survey (R22 560 average spending per production). This does not mean that the costs of production at the NAF have fallen, but perhaps that, like audiences, artistic producers can afford less lavish production types, are choosing cheaper accommodation and staying for a shorter time.

Table 19 Average Spending by Artistic Producers (Rands)

	Emerging (33)	Established (40)	Total (73)
Accommodation	6 614	7 984	7 364
Venue	2 682	3 600	3 194
Advertising	1 518	2 273	1 932
Props	1 567	2 533	2 096
Employment	1 309	2 321	1 864
Food	2 471	3 366	2 962
Transport	1 813	2 908	2 413
Other	2 592	2 729	2 665
Total Average Spending	18 283	25 371	22 167

Artistic producers were also asked to estimate what proportion of their overall production spending took place in Makhanda, and in the Eastern Cape. 63% of producers reported spending more than 50% of the total production costs in Makhanda, with a small group (11%) of local producers incurring all their production spending in the city.

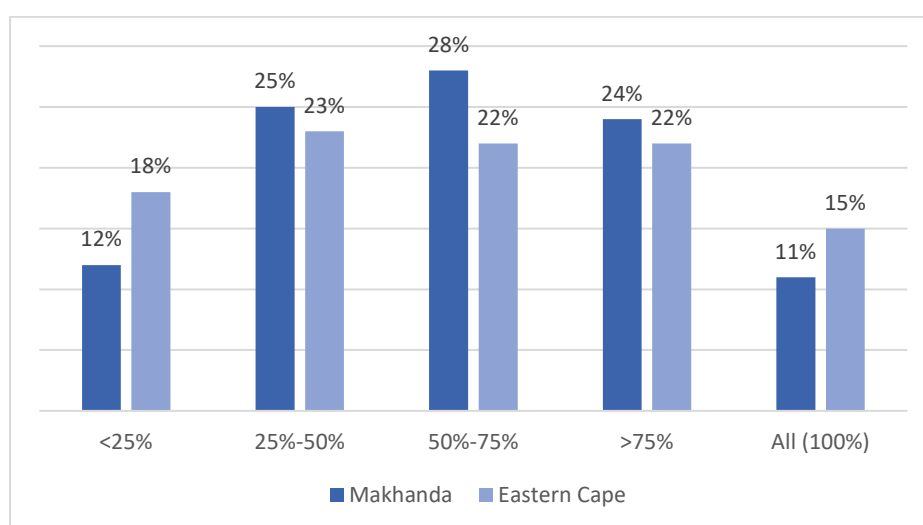


Figure 16 Percentage of Artistic Production Spending in the Host Economy

5.7 Looking backwards to Look Forward

Undoubtedly, the NAF remains an important festival in the arts and culture ecosystem of South Africa, over its 50-year history. Artistic producers in both FGDs and online survey appreciate the NAF's value to the South African, Eastern Cape and Makhanda cultural, tourism and economic landscape. To highlight this high level of appreciation, 98.7% of artistic producers responded “Yes” to the question, “Do you think the NAF is an important Festival in the Eastern Cape and the South African cultural landscape?” Although this question does not provide specific reasons why the artistic producers rate the NAF so highly, the reasons are manifold if it is read with the response to other questions presented and analysed in this report. For instance, artistic producers’ responses to the online survey question, “What makes the festival special to you?” highlighted valuable insights into the importance of the Festival over time. Responses can be grouped under the following themes

From an artistic perspective, producers note that over the years, they have attended the Festival, it:

- [...] gives young artists a chance to shine
- [...] is special because it is a time of creatives, networking, seeing shows and the city come to life.
- is [is valuable because of] being able to socialise with other choreographers, seeing their work and learning more from them
- is a big stage to present your work and be seen by people who would appreciate your work new or not especially people around the town they are the vessel of strength to everyone presenting their work even the people on the venues like city hall they are very supportive working hard there are 4-star quality sound and lighting it was wonderful.

The Festival was identified as a prime networking event by artistic producers, contributing to the growth and development of artistic producers over the years in term of:

- Networking and diverse educational content
- Lovely vibe; good (and bad) theatre!
- The sharing of creative endeavours
- For people to see our performance
- It is a highlight in the Eastern Cape and brings so much 'life' to our province.
- That it is an international festival, and there is a lot of shows coming in place
- To get more experience in theatre shows

The Festival also offered opportunities for growth and development:

- It is a place to test the temperature of the arts nationally and to network with people from our industry across the country. It is always a rewarding experience in terms of discovering new artists and making connections. It is a meeting place and a space for dreaming new projects and possibilities.
- It's a creative platform to share work in a safe space and an important phase of the development process for my work. It's also rare and special to be around so many other artists, especially artists making self-produced work, at the same time.

- The opportunity to meet and connect/reconnect with artists. A chance to test work duty audiences. The opportunity to find new places for work to travel to.
- The Festival is a remarkable platform in that artists and their work are discovered in this space, and this platform is almost a 'springboard' into the industry.

The artistic producers that attended the FDGs similarly highlighted the same long-term significance that NAF has had on the South African cultural space. Overall, artistic producers recognized the NAF as a crucial institution in the development of arts and culture in South Africa. It provides a space for artistic expression, cultural reflection, and international exchange. This can be gleaned from a few responses recorded below:

“Getting to the festival, the access to the best spaces, to the best technician, that allows you to produce the quality.”

“The first time I came to the festival was about 25 or 30 years ago. It took me very, very much. It was a conversation that wouldn't have happened at all. It was the pinnacle of all the show, everything artistic in the country. It was the National Art Festival. What actually, I came with a show from Cape Town, scouts would come out. One of the scouts was in your auditorium, you put on the best show, and that's how to do it. Because they were coming shop, and then you would be invited to all these other festivals that have now sprung up.”

There was also recognition of the NAF as an important platform to showcase work, now and in the past, and a call to revitalise this aspect of the Festival:

“There used to be something called an arena program a few years ago, which would give a certain bit of funding to those productions which have won innovations to come back, not at the fringe, but unlike innovation. An award-winning label called The Arena. Those productions would be there. We'd have three different programs. We'd have The Fringe, The Arena, and The Maine. So stuff like that, maybe to continue to working in that might contribute to getting, say, those grassroots production to come on board because it is a big cost”.

“There used to be the World Fringe Alliance which [the NAF] used to be a part of. It would call out all the Fringe producers from all over the world to come to the Festival and select Fringe production, particularly for those who are in the ovation panels, to go and participate in those festivals outside and then provide them with funding. I don't know why and how those systems fallen away, because in 2018, 2015, those things were there”.

These submissions by artistic producers highlight the multiple critical roles that NAF has played over the years in developing, positioning and creating networks that enabled them to grow. However, producers also highlighted significant areas for improvement, particularly in inclusivity, economic sustainability, and post-festival development opportunities. Many artistic producers felt it could do more to support long-term growth for artists and to reconnect with local communities.

“The festival is, obviously, amazing, an amazing thing. There are lots of opportunities for everybody and its really great. But I do not want to look at it on the other side of it. It does feel like removed from a certain part of the audience.

It's very much happening on the side. It feels like you get it for certain people. That's just the sense that I got a little bit. I remember growing up when I used to come to the festival, and it feels for me such a different experience because you'd be walking around everywhere around town and literally bumping into people. Literally, what you said of meeting all these different types of people is stuff that was happening in the streets. It was just like there was just so much more culture in it as opposed to now. That's just the sense I get of the festival as it is now".

"There are those ones who are visitors that are feeling a high power of Christmas when we come here because they want to see it. But the most important also is the people from the town. What are they left with? I think that's quite important. [...]When we came here in earlier days, the village green used to be there. Actually, it formed a bridge between the community and the town".

Artistic producers in the FGDs also suggested that the NAF could improve the "sense of belonging" and recognition for long-time Festival producers who have been part of the event over many years, and who are current (and previous) Ovation Award winners.

These observations are based on the years of experience that artistic producers have had at NAF largely reflecting on the 2024 edition. In essence, it can be gleaned from these critical reviews that over time the NAF has created opportunities for artistic producers, created a strong festival atmosphere in Makhanda, which revitalised the social fabric, became an inclusivity bridge and built a sense of belonging, generated income through advertising for the artistic producers and offered recognition to excellent producers through the Standard Bank Standing Ovation Award. Yet, there remains room to re-engineer future editions to revive these contributions to the South African, Eastern Cape and Makhanda socio-cultural and economic landscape.

6 The Economic Impact of the 2024 NAF

In addition to the artistic and social value of a cultural festival, tourism events attract "new" money into the impact region and create direct and indirect impacts through re-spending of the initial injection. 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?"

An economic impact study thus calculates all the additional economic activity that takes place in the impact area (which can be defined as a town, municipality, or province) as a result of the event. This means that normal expenditure by local residents and sponsors from inside the impact area that is likely to have taken place regardless of the event should not be included, as it would over-estimate the financial value of hosting the event.

The first step in estimating Economics Impact is to determine the first-round (direct) spending of major groups, which includes spending by:

- Non-local festinos from outside the impact area
- Additional spending by local festinos at the Festival
- Artistic producers

- Media representatives
- Festival organisers

To estimate this spending, a combination of data from festival organisers and survey research was used. Since the 2024 study did not include a survey of media representatives, spending was estimated based on past studies at the NAF and on average non-local spending data.

The Economic Impact of the 2024 NAF was calculated at two scales:

- The Economic Impact of the 2024 NAF on the host city, Makhanda
- The Economic Impact of the 2024 NAF on the host province, Eastern Cape

6.1 The Economic Impact of the 2024 NAF on Makhanda

The first step in estimating Festino spending is to determine the number of festival-goers. As in past studies, the ticket sales method is used: Total tickets sold are divided by the median number of tickets bought by festival-goers. In 2024, 40 877 tickets were sold for the Curated and Fringe programmes, and the median number of tickets bought by festival-goers was 4. This gives an estimated number of individual visitors as 10 219.

Of these festival-goers, 35% were local residents, meaning that 65%, or 6 643 were visitors from outside of Makhanda. Visitors stayed an average of 4.2 days, so the estimated number of visitor days (if one added up the number of visitors who attended on each day, over the whole festival), was 27 900. An estimated 3 577 local residents also attended the festival.

Using information from the visitor survey, average visitor spending is used to calculate total spending in Makhanda by non-local Festinos (R32,17 million). Residents at the festival were also asked to estimate their spending, in addition to their “normal” monthly spending, that is, the money they spent on “holidaying” at the Festival on things like tickets, eating out, and shopping at craft markets. In a small town like Makhanda, it is reasonable to assume that if the NAF had not taken place, many local residents would have spent such entertainment funds elsewhere. Total first-round Festino spending, but out-of-town visitors and local residents was thus estimated as R37,36 million.

Table 20 First Round Spending by Festinos, Media Representatives, and Artistic Producers

Festino Spending		
Average spending per visitor (whole stay)	R	R4 844
Total visitor spending	R	32 176 331
Average additional per person local spending	R	1 449
Total local spending	R	5 182 693

Total Festino spending	R	37 359 023
Media First Round Spending		
Number of media representatives		189
Average days (default: same as visitors)		4.2
Spending per day (default: 1.2 x visitors)	R	1 384
Average media spend per person	R	5 813
Total media rep spending	R	1 098 619
Artistic Producer First Round Spending		
Number of Productions		304
Average spending per production	R	22 167
Total artistic producer spending	R	6 738 701
Total Festino, Media and Producer Spend	R	45 196 344

The number of registered media representatives was obtained from festival organisers (189) and their spending was based on average visitor spending, with a 20% add-on to take into account increased travel and networking. Total spending by media representatives at the NAF 2024 was calculated as R1.1 million.

The number of productions at the NAF 2024, including shows and exhibitions was obtained from the NAF organisers (304, made up of 34 on the Curated programme, and 270 on the Fringe). Through the online producer survey (see section 4), data on average spending per production was obtained. Total first-round producer spending in Makhanda was calculated as R6.74 million.

In total, spending by audiences, media representatives and artistic producers at the NAF 2024 was R45,2 million.

The NAF also receives considerable sponsorship from both the public and private sectors. Without the Festival, it is unlikely that this sponsorship could have been attracted to Makhanda.

In 2024, the NAF raised R36,69 million in support, of which 60% was spent in Makhanda, resulting in direct organiser spending of R22 million. The NAF also earns some income through ticket sales surcharges, venue hire, etc. which amounted to R3.9 million in 2024. However, part of this income is paid out to artistic producers (the NAF has its own ticketing system that is used to sell tickets on behalf of artistic producers for a surcharge) or represents the spending of Festinos and media representatives. Including the organiser earned income is thus likely to lead to double counting and over-estimation of economic impact.

Table 21 The Economic Impact of the 2024 NAF on Makhanda (in Rands)

Total Festino, Media and Producer Spend	45 196 344
Festival Organiser Spending in Makhanda	22 014 668
Local capture rate (accounting for immediate outflow)	0.73
Total first-round spending captured in the host economy	49 064 039
Multiplier	1.18
Total Economic Impact (Makhanda)	57 895 566

First round total spending by all groups (Gross impact) is calculated to be R67,2 million. However, some of this spending is likely to leave the region immediately, thus having no real impact on the economy. This applies to some visitor spending, as well as to the spending by organizers. To avoid an overestimation of the economic impact of the NAF, it was thus assumed (as in previous reports) that there is an immediate 27% outflow (a local capture rate of 73%), leaving a net first-round impact of R49 million.

The best multiplier estimates are obtained by using input-output tables to construct a complete set of multipliers for each industry in the impact area. However, no such tables exist for Makhanda. A multiplier of 1.18 was used to determine successive rounds of indirect spending in Grahamstown. It is based on estimates used in previous studies based on local business surveys, and reviews of multipliers used in other festival studies (Antrobus et al. 1996; Snowball and Antrobus 2002; Seaman and Snowball, 2017). An online economic impact calculator developed by Seaman and Snowball (2017) specifically for cultural events and organisations in South Africa, gives the multiplier for a region with a population size of Makhanda (Makhanda/Grahamstown, Census, 2011), as between 1.25 and 1.31. The multiplier used for the NAF may thus be regarded as a realistic, conservative estimate of the impact of the re-spending of the initial inflow in the Makhanda economy.

The total impact of the 2024 NAF on the economy of Makhanda was thus R57,9 million. This represents what the city would have lost if the Festival had not taken place.

6.2 The Economic Impact of the 2024 NAF on the Eastern Cape

Changing the size of the impact area, in this case from Makhanda to the Eastern Cape (EC) province, can have significant effects on the size of the economic impact of an event. Larger impact areas tend to have larger local capture rates and multipliers, as less of the first-round impact “leaks” out of the impact area. However, all Festinos from the Eastern Cape now count as “locals” and only those from other provinces are regarded as visitors to the impact area, bringing new money into the host economy. Similarly, sponsorship from Eastern Cape investors cannot be counted, as one could argue that, if the NAF had not taken place, the money would in all likelihood have been spent on other things inside the province. Thus, in the provincial calculation, only the R21,23 million from sponsors outside the Eastern Cape can be included, 80% of which (R16,99 million) organisers report spending in the Eastern Cape.

As with the calculation of the economic impact of the NAF on the Makhanda economy, some would argue that spending by residents of the impact area (in the case, residents in the Eastern Cape Province) should not be included. The rationale is that only “new” money that would not have been spent in the region anyway should be included. For example, if the NAF did not take place, could it be argued that none of the spending by Eastern Cape Festinos would have occurred in the region? In other words, instead of spending money on the Festival, residents would have spent the money outside of the Eastern Cape. In a small impact area, like Makhanda, the argument is more plausible, but some adjustments would have to be made as the impact area increases.

Table 22 The Economic Impact of the 2024 NAF on the Eastern Cape Province (Rand)

Average spending per Non-EC visitor at the NAF	6 062
Ave spend per EC Festino at the NAF (weighted 50%)	1 582
Number of non-EC Festinos who stayed on in EC (17%)	643
Average additional Festino spending for those who stayed on in province	4 111
Mean additional spend per visitor in Province per person (Ave Group Size=1.7)	2 418
Total Spending of EC local residents at the NAF (at 50% weighting)	10 181 899
Total Spending of non-EC visitors at the NAF	22 921 165
Total Additional Spending of non-EC visitors staying on in the province	1 554 419
Media Representative spending	1 098 619

Artistic Producer spending	6 738 701
Sponsorship to Organisers from outside the Eastern Cape	21 236 000
Organiser spending in EC (80%)	16 988 800
Total first-round spending in EC	59 483 603
Local capture rate (0.80)	47 586 883
Gross impact (K=2.77)	131 815 665

Including Makhanda residents, 63% of Festinos sampled in the 2024 survey came from within the impact area (Eastern Cape). In their study of the economic impact of the 2009 NAF on the Eastern Cape, Saayman and Rossouw (2011:616) argue that, “Although locals do not bring money into the community from outside the regions as visitors do, it is valuable to include their spending as it has the effect of initiating economic activity within the local economy”. While this may be the case, this practice goes against the aims of an economic impact study, that is, to determine the economic impact *directly attributable* to a particular event or industry. We thus argue that, while there would undoubtedly be a reduction in the spending of Eastern Cape residents within the province if the NAF did not take place, at least some of that spending is likely to take place in other parts of the province instead. To allow for this, only a conservative 50% of spending by EC residents was included in the economic impact calculation, as was done in previous NAF studies.

Of the non-EC Festival visitors, 17% reported staying in the Eastern Cape before or after their visit to the NAF (an estimated 643 people) for an average of 2.9 days. Excluding the amount they spent at the NAF, visitors who stayed in the province reported additional average spending of R4 111 per group, for an average group size of 1.7, which amounts to R2 418 per person additional spending in the province, or a total of R1.55 million. Such leveraging effects of tourism can be an important way to increase the impact of an event on a host province.

Expenditure multipliers have been calculated for the Eastern Cape. Saayman and Rossouw (2011) used a social accounting matrix to construct a set of multipliers for the province and found that total expenditure multipliers were between 2.77 and 2.79. For this study, a multiplier of 2.77 was used, and the total impact of the 2024 NAF on the Eastern Cape Province is thus R131,8 million. This can be interpreted as what the province would have lost if the NAF had not taken place.

Comparison with pre-COVID Festivals and reasons for differences

In 2019, the Economic Impact of the NAF on Makhanda was R86 million. There are several reasons for the decline in impact, but the most important are the negative impacts of load shedding and the disruptions (particularly to the live performance arts) of the power outages, and the COVID-19 pandemic. These have resulted in slow economic growth in the post-COVID era in South Africa (National Treasury Economic Outlook, 2024).

The impact is not limited to the NAF. According to the most recent Domestic Tourism Survey (DTS, 2024), “The domestic market is experiencing a decline in economic performance with declining GDP. Consumer price inflation continues to move upwards, inflicting more strain on household budgets”. Although the number of people travelling domestically has recovered, there has been a decline in the average length of stay (from 3.8 nights in 2019 to 3.2 nights in 2024). Spending is also under pressure, with average domestic tourism spend per trip declining from R3050 in 2022, to R2692 in 2023.

The results for the NAF can be seen in several ways, the most obvious of which is a decline in visitor numbers, with a resultant fall in ticket sales. Although the average spending for out-of-town visitors increased (from R3 841 in 2019 to R4 844 in 2024), this was more than offset by the fall in visitor numbers and in their length of stay (an average of 5.6 days in 2019, to 4.2 days in 2024).

There was also an increase in the proportion of local Festinos (from 23% in 2019 to 35% in 2024). While local participation and support are an important part of Festival value and sustainability, residents spend less money at home-town events than out-of-town visitors. In addition, the average spending by local Makhanda residents at the NAF has declined (R1634 in 2019 to R1449 in 2024).

Finally, on the supply side, artistic producer spending remained the same at an average of R22 000 per production (although given inflation, this represents a real decrease). However, there was a dramatic decrease in number of productions (from 625 in 2019 to 304 in 2024), resulting in a total artistic producer spending drop (from R14m in 2019 to R6.7m in 2024).

6.3 Environmental and Social Impact of the NAF

“We have an interest in a brick machine”

In addition to their economic impact, festivals and events also have other social and environmental impacts. In an era of global concern about climate change, festival organisers and audiences have become increasingly aware of the negative environmental impacts that events have, including carbon dioxide produced from travel and energy use, pollution from paper used for programmes, maps and tickets, waste from food packaging, etc (Collins and Cooper, 2017).

For festivals to be sustainable in the long run, they are reliant on the infrastructure of their host city, as well as on the good will of local residents, who can play an important part in making the event unique and enjoyable. Cultural festivals also play an important role in building social capital and identity in communities (Carneiro et al. 2019). Scholtz et al. (2019) focused on how local residents experienced the MACUFE, and acknowledged that, while festivals can have positive impacts on a host city (showcasing local cultures, helping local businesses earn more income, and being a catalyst for the improvement of city infrastructure), they may also be associated with negative impacts, such as increases in crime, overcrowding, and noise. Careful management of such issues, and finding ways to support and enhance the local community, are important for mutually supportive and beneficial relationships between festival and host.

The updated South African Festivals Economic Impact Calculator (SAFEIC) tool (SACO, 2024) proposes a set of sustainability indicators for SAFEIC2024 track festival environmental initiatives implemented by festival managers, which can affect their policies, the choice, and behaviour of suppliers, and visitor education. These indicators were piloted at the NAF 2024, through interviews with NAF organisers and their self-rating (supported by evidence) of their progress toward environmental sustainability.

Festival organisers were asked to rate the NAF using a series of qualitative descriptors, as shown in the table below, and to provide additional evidence and information for more advanced sustainability initiatives. Over time, festivals that use these descriptors will be able to track their progress and report more easily to funders and audiences, who are increasingly concerned about environmental impact, even in developing country contexts (Kacerauskas et al., 2021).

Table 23 Qualitative descriptors of festival environmental sustainability reporting

Descriptors	Description
Not Implemented	The Festival has not yet begun to discuss implementing this initiative, OR this is not a feasible option for the Festival
Aspiring	The Festival recognises the value of this initiative, discussions have started, and we have plans to see if this is feasible to introduce in the future.
Introducing	We have identified this as an important issue, have plans to introduce this initiative, and are piloting some aspects.
Implemented	The Festival has implemented this initiative, and it is part of the event planning and management.
Enhancing	The Festival has an established track record of implanting this initiative and it is being monitored and enhanced.

The first set of Environmental Sustainability indicators is around festival management and organisation itself. The NAF management has made considerable progress towards implementing a number of environmentally friendly practices, including reducing paper, reducing energy use, and reducing and managing traffic congestion.

In June and July 2024, the NAF sourced R6,7 million from the Social Employment Fund that was spent in Makhanda, and created 1604 direct jobs in Makhanda, in addition to the 247 work opportunities related directly to the Festival itself.

One of most extensive initiatives relates to waste recycling, which the NAF leads not only during the Festival itself but as a community initiative as part of wider social impact. The NAF reports that it collects 250 tonnes of waste a month, 20% of which is recycled. It is

also leading a project to pilot the production of new products such as bricks and pavers from recycled plastic and crushed glass, which can then be used to improve the infrastructure of the host town. In an interview with the CEO of the National Arts Festival, her opening remark was “We have an interest in a brick machine” – perhaps not what one would expect in the circumstances, but later explained as one of the NAF’s environmentally friendly business initiatives. The plan is that, once the concept is piloted, it could be handed over to local businesspeople to run.

Table 24 Festival Management Sustainability Initiatives

Festival Management	Descriptors
The Festival has written management policies or guidelines related to environmental sustainability (for example, resource use, pollution control, and recycling)	Aspiring.
The Festival has reduced printing and paper use (such as the provision of online programmes and eTickets)	Implemented. In 2024, 57% of all tickets sold were online and the NAF no longer produces a physical programme.
The Festival provides waste recycling collection points	Implemented. Recycling points are maintained at the Village Green. All wood chip laid is collected and reused as mulch and other products that support greening initiatives in Makhanda. The NAF is running a large public employment programme that collects approximately 250 tons of waste per month, recycling about 20% of this. 2 tons of compost is produced monthly, and work is being done to pilot production of new products such as bricks and pavers from recycled plastic and crushed glass.
The Festival has reduced the use of single-use plastics and non-recyclables	Aspiring.
The Festival has initiatives in place to reduce energy use where possible (lighting, venue heating or cooling etc)	Implemented. Mainly as a response to load-shedding the NAF has implemented a programme of using LED lighting and other energy saving devices where possible.
The Festival sources energy from renewable energy providers	Not implemented.

The Festival has initiatives in place to reduce traffic congestion in the host city or town	Implemented. The NAF runs a hopper service in two circuits to key venues and works closely with Makana Traffic to manage traffic and parking.
The Festival has initiatives to controlling noise and light pollution in the host city or town.	Not implemented.

Table 25 Festival sustainability related to suppliers and visitors

Suppliers	Descriptors
<i>The Festival encourages reduced use of plastics and non-recyclables by vendors (like food suppliers and craft markets).</i>	Aspiring.
<i>The festival prioritises using catering suppliers who provide vegetarian food, food from organic sources, and who use local supply chains.</i>	Aspiring.
Visitors	Descriptors
<i>The Festival provides environmental education to visitors, alerting them to issues such as reduced littering and the importance of waste recycling</i>	Implemented. The NAF provides information to visitors on water usage and has various strategies in place in venues to reduce water consumption. This has been in place for some years given the water issues in Makhandia.
<i>The Festival provides information to visitors on public transport options to reduce travel emissions</i>	Implemented in our visitors guide we encourage use of public transport to get to Makhandia and the use of the hopper service.
<i>The Festival encourages car sharing to reduce carbon emissions from individual visitor travel</i>	Not implemented.

The Festival recycling programme, and other initiatives related to the repair and maintenance of town infrastructure, are funded through the Social Employment Fund (SEF), which is managed by the Industrial Development Corporation. The NAF acts as a hub for socially important projects that also create jobs in the town, especially for unemployed young people and women. This is an example of how the management expertise, human capital and trust that the NAF has can be leveraged for wider social development.

In June and July 2024, the NAF sourced R6.7 million from SEF funding and created 1604 direct jobs through the programme, in addition to 247 jobs related directly to the Festival itself (technical and support staff). While not, strictly speaking, part of the Festival event itself, being able to successfully apply for such funds and manage and run the projects they pay for is an important part of the economic and social impact of the NAF and would not have happened without NAF leadership.

In addition to environmental sustainability measures taken by festival organisers, suppliers and visitors can also be encouraged to implement more environmentally sustainable practices. Although not always in the control of the Festival itself, organisers can encourage certain kinds of behaviours through their supply chain policy, such as reducing the use of non-recyclable packaging in food stalls and craft markets, and prioritising catering from local suppliers who use more vegetarian and organic foods. The NAF aspires to implement such measures in the future, although they already source as many goods and services from local suppliers as possible.

Visitors can also be encouraged to use more sustainable transport options, such as public transport around the festival, and car sharing for travel to the festival. NAF organisers provide a “Hopper” bus service in Makhanda that Festinos can use to travel between venues and markets. The online visitor guide also encourages the use of public transport to get to Makhanda (although the public transport options in the Eastern Cape are not extensive).

The NAF also provides information to visitors on how to reduce water consumption and has water-smart strategies to reduce water consumption in venues. This is partly motivated by the recent water shortages in Makhanda (both as a result of drought and infrastructure issues), but contributes to reducing the environmental impact of the event.

7 Conclusions and Recommendations

The purpose of this report was to provide an assessment of the social, economic and cultural impact of the 2024 National Arts Festival, reflecting also on its contribution to the South African cultural ecosystem on the occasion of the 50th anniversary of the Festival. Research methods included an audience survey (in-person interviews, and an online option), interviews with Festival organisers, and an online survey and in-person focus group discussions with artistic producers. This final section reflects briefly on the results and makes some recommendations based on the research.

The findings showed that the NAF continues to play an important role in connecting artists to audiences in South Africa. The generally high ratings obtained by the Festival for most of its offerings were maintained in the post-COVID period. Audience survey responses also show that the NAF plays an import role in social cohesion and in building the appreciation of arts and culture amongst both regular Festival attendees and newer audiences.

Based on the audience survey data, recommendation for future editions of the NAF are:

Enhancing Festival Atmosphere and “Vibe”: Both visitors and local residents commented on the declining Festival atmosphere, particularly linked to the disappointing craft markets. Although the NAF is traditionally a winter festival with a focus on indoor shows, the decline in street performances, live music, buskers, and craft market offering. Paying attention to improving this part of the Festival would be important, especially for younger festinos, who attend more free shows, and for local (Makhanda) residents, increasing creativity. The suggestion to include more food vendors and keep the Village Green open later could also be considered. Indeed, the craft markets are often seen as the link between Makhanda West (including the CBD and The Monument) and Makhanda East (the township). Improving the vibe and craft markets could also be seen as an important way to build social cohesion in the host city, and address comments about some local residents feeling left out.

Increase Accessibility through Better Marketing and a More user-friendly website: A number of festinos mentioned the lack of high-visibility marketing for the NAF, especially outside the province. Both older and younger Festinos commented on finding the website difficult to use (leading to calls to bring back the printed programme). Investing in website user-experience design, and perhaps having a downloadable version of the daily programme could help.

Recommendations for different age cohorts:

For **younger** audiences, increasing free and low-costs social events would help to build the “vibe” and attractiveness of the festival. In addition, digital marketing could be effective, particularly on social media platforms, and through influencer partnerships. For the younger, price-sensitive group, improving transport (the “hopper”) and negotiating the provision of more affordable accommodation options could also help to build participation and longer stays.

For **older** audiences, the focus is on ticketed, curated shows. Although not always under the control of Festival organisers, addressing complaints about outdated facilities and venues that were less comfortable, without clean facilities, could build demand. Carefully indicating family-friendly shows and activities could also help. For this group, finding their way around (sometimes needing to move quickly between ticketed shows), more maps and onsite assistance would be useful.

The online producer surveys and focus group discussions demonstrated that NAF remains a premier African arts festival, enabling artistic producers and audiences' creative development, growth, and nurturing. NAF was also framed as space for a broader dialogue on socio-political and economic issues, highlighting the state of the nation and influencing policy and cultural practice. The FGDs and online survey affirmed NAF's long-standing contribution to the economic and cultural development of the arts and culture industry in South Africa through supporting emerging artists, networking and collaboration, and boosting local economies and cultural life. However, the FGDs highlighted a number long long-term and short-term challenges which include funding challenges and limited economic benefits for artists, exclusiveness and lack of integration of local artists and communities, venue and festival logistics, seeming declining standards of the festival and a mismatch of expectations particularly related to the standing ovation award and its associated benefits.

Based on the artistic producer data, the recommendations for future editions of the NAF are:

- *Revive the carnival atmosphere at the Festival craft markets*– the majority of artistic producers highlighted that the Festival needs to revive the carnivalesque atmosphere at the craft markets through re-integrating street performances and redeveloping the markets as an epicentre of the Festival. This would also improve the foot traffic to festival venues.
- *Revive the Artist's Passes and Artists Lounge* to enhance connectivity and networking among artistic producers. Artistic producers highlighted that the absence of artists' passes and an artist lounge networking space hindered peer review and networking with their peers and audience.
- *Clarity on Ovation Awards* – Artistic producers in the FGDs highlighted a need for clarity around what an Ovation Award entails and its associated benefits. Providing clarity will be fundamentally important in managing relations and expectations between the Festival and its artistic producers
- *Improve venue and programming logistics*. Artistic producers highlighted frustrations and challenges in understanding the Festival's venue allocation processes and programming. This would assist artistic producers to plan accordingly and appropriately.

The economic impact of the NAF 2024 on the economy of Makhanda was calculated to R57,9 million, and on the Eastern Cape, R131,8 million. The decline from previous years can be attributed to factors such as a rising inflation and poor economic growth, which has generally decreased domestic tourism. In addition to the Festival itself, the NAF has also become an important local hub for social development in Makhanda: In June/July 2024, the NAF sourced R6,7 million from the Social Employment Fund that created 1604 direct jobs in addition to the 247 work opportunities related to the Festival itself.

Some of the previous recommendations, such as improving marketing of the NAF, could help to increase NAF audiences. Other ways of increasing economic impact include working with local suppliers to provide affordable accommodation options, which would increase visitor length of stay and thus the number of shows attended, and spending in other categories. The NAF already sources much of what is required from the host city and province, thus increasing the multiplier effect. Making local businesspeople more aware of both the constraints of the Festival in terms of organisational capacity and budget, as well as opportunities for those who partner with organisers, will be an important part of maintaining local support for the event, making it more accessible and inclusive, and improving the quality and variety of offering for visitors.

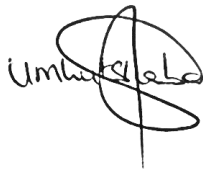
A new aspect of this study is the inclusion of reporting on the measures taken by the Festival to mitigate negative environmental impacts. As the results show, the Festival already has in place some innovative ways of increasing its environmental sustainability. Highlighting such initiatives, alongside suggestions to audiences to reduce impact through car-pooling, for example, may be an effective way of marketing the Festival to environmentally conscious visitors.

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**APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY - National Arts Festival
2024: The Economic, Cultural and Social Value of the Festival _December 2024**

	NAME	TITLE	SIGNATURE	DATE
Approved by:	Ms Unathi Lutshaba	SACO Executive Director		18 December 2024
Approved by:	Dr Mphikeleli Mnguni	DSAC, SACO Project Manager		
Approved by:	Dr Stella (CN) Khumalo	DSAC DDG: Arts, Culture Promotion and Development		