



## **South African Cultural Observatory**

### ***Monitoring & Evaluation:***

Key Development Indicator Report on a DAC Intervention

**Intervention:** National Arts Festival

Submitted to the Department of Arts and Culture



**arts & culture**

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Department:  
Arts and Culture  
REPUBLIC OF SOUTH AFRICA

# The Impact of the 2016 National Arts Festival

## Summary

The South African National Arts Festival (NAF), is one of the oldest and largest mixed arts festivals in Africa.

Research design was based on the Framework for the Monitoring and Evaluation (M&E) of Publically Funded Arts, Culture and Heritage (SACO, 2016), and on previous NAF studies.

Data was collected via a carefully stratified sample of interviews and self-completion questionnaires. Results demonstrated that the M&E Framework is a satisfactory tool to gauge the extent to which a large festival attains its stated goals.

The more than 600 interviews conducted during the 11-day 2016 Festival consisted of 512 visitors (locally called 'Festinos') and 100 locals. The majority of visitors from beyond the town were from the rest of the Eastern Cape, Gauteng and the Western Cape Provinces and had been to the National Arts Festival six or seven times previously. Typically, Visitor Festinos stayed for 6 days, attending more than 10 ticketed shows in addition to free performances, exhibitions and craft markets, with spending of close to R6 900 on accommodation, tickets, food and drinks and shopping.

Festinos rated accommodation, restaurants, Main and Fringe shows highly or very highly between 70% and 88% on average. Craft markets were rated somewhat lower. Compared to the 2013 study, positive Festino opinions on socio-cultural value of the Festival were markedly improved. These were measured by asking festinos to respond to statements relating to the opportunity to see artists and events not otherwise able to be seen, increasing their understanding and enjoyment of culture, and providing new and interesting topics for socializing and 'talking about. Ninety-nine per cent of those interviewed would recommend the event to others.

## Key Findings



- Festival consisted of nearly 3 000 ticketed and free performances, art exhibitions and craft across a multitude of genres
- Greater diversity in those attending from beyond the Eastern Cape seen in 2016
- A third of festinos are professionals or in management
- 72% have tertiary qualifications
- 56% earn >R20 000pm after tax
- Festinos spend an av. of 6 days at the Festival
- Home languages: English (60%); African languages (20%); Afrikaans (14%)
- Main and Fringe shows are rated highly or very highly by more than 80% of visitors;
- More than 80% say the Festival builds Cultural and Social Capital; 72% Social Cohesion and 69% inter-cultural understanding.

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**Note: This report makes up the first part of the study on the NAF 2016. The Economic Impact report will follow as soon as the necessary data is obtained from the organisers.**

### 1. *The NAF Context*

The Grahamstown National Arts Festival (NAF) was started in 1974 and had about 60 events, running over a week. Despite the small size of the town, it has one of the largest auditoriums in the county, the Monument (seating capacity of 900), which makes Grahamstown an ideal setting for staging large productions (Neville, 1999). According to organisers, the NAF is now the largest arts festival in Africa. Originally focused on celebrating English cultural heritage, the NAF has diversified considerably since its inception, and now includes a significant number of South African, other African, and other international productions (Yiga, 2014; NAF website, 2016).

The NAF can be described as a 'mixed' arts festival in that it includes a wide variety of genres. Modelled on the Edinburgh Festival, the NAF has Main and Fringe programmes. Performances on the Main are invited by the Festival organizers (curated) and are heavily sponsored. The Fringe is open to all, but performers are responsible for covering their own costs, setting ticket prices and raising sponsorship. In recent years, genres on the Main and Fringe programmes have diversified considerably and now include: Music (jazz, contemporary music, African music, classical music), Dance (physical theatre, ballet, modern dance, African dance), Drama (including performance art, poetry, cabaret, musical theatre and student theatre), a lecture and discussion series ("ThinkFest"), Family and Children's festival, and a Film festival.

The NAF also includes craft markets, street theatre, awards for young South African artists (sponsored by the Standard Bank, who were the previous title sponsor), has its own daily newspaper ("Cue"), and a variety of free shows (such as the "Sundowner" concerts).

The Festival is sponsored by the Department of Arts and Culture (under the MGE Flagship programme), the Eastern Cape Provincial government, the Standard Bank, and the National Lotteries Commission, as well as a number of smaller "strategic" sponsors.

The 2016 NAF Programme identified a number of key goals or aims:

- To be a "debating ground" for the "big issues" and a home to the "activist artist";
- To reflect the cultural diversity of South Africa and to foster social cohesion;
- To foster collaborations between South African artists, and between South African and international artists;

- To attract a diverse audience and develop their understanding and appreciation of arts and culture.

## 2. Research Design and Methods

In addition to valuing the impact of the NAF, one of the aims of this research was to test the Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage (SACO, 2016). The research design was thus based on the Framework.

The values associated with arts, culture and heritage can be divided into three broad categories: economic (financial) impacts, social impacts and the intrinsic value of art itself. Economic, or financial, impacts come about as a result of the inflow of new money into an economic system as a result of visitors from outside the region. Visitors spend on accommodation, transport, food, shopping, tickets etc. This spending then recirculates in the host economy, increasing sales and employment in local businesses. Social values relate to the benefits to society, such as education, creativity and innovation, social cohesion and identity formation (Bohm and Land, 2008). Intrinsic values relate to the symbolic, artistic nature of the product itself and to feelings invoked in individual participants (such as joy, sadness, anger, delight, questioning etc.).

Based on these three broad categories of value, the Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage (SACO, 2016) outlines the development of five cultural value indicators or themes (Figure 2), which include: Audience development and education; Human capital and professional capacity building; Inclusive economic growth; Social cohesion and community development; and Reflective and Engaged citizens.



Figure 1: The 5 Cultural Value Themes (SACO, 2016)

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The broad themes for cultural value were based on:

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

The Monitoring and Evaluation Framework (hereafter M&E Framework) links these broad themes to specific indicators and to the methods for collecting data on the indicators. However, each cultural event is different, and any useful valuation study needs to take into account:

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

Indicators specific to the stated aims of the Festival are set out in Table 1.

*Table 1: Cultural Value Themes, Indicators and Research Methods for the NAF*

<b>Theme</b>	<b>Indicators</b>	<b>Research Method</b>
<b>Audience Development &amp; Education</b>	Demographics (Age groups; Cultural/Race groups; Gender)	Audience survey
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)	
	Income and Education Groups	
	Participation & time-use	
	Ticket sales/participation (numbers)	Organiser data
	Local residents vs Visitors	Audience survey
	Attendance at "new" kinds of ACH	
	Appreciation of ACH	
<b>Human Capital/Professional capacity building</b>	Training offered	Organiser data & Programme
	Experience gained	
	Volunteers & Interns	
	Impact on local SMMEs (established)	

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	Opportunities & partnerships with local artists	
	Opportunities & partnerships with local stakeholders	
	Opportunities for cultural entrepreneurs	
	Development of artistic quality	
	Showcasing South African art and artists	
<b>Inclusive Economic Growth</b>	Organiser spending	Organiser data
	Earned income/Turnover	
	Sponsorship (and sources)	Audience survey
	Audience spending	
	Producer spending	Producer survey (2013)
	Media representative spending	Media survey (2013)
	Length of stay (Bed nights)	Audience survey
	Tourist leverage (extended trips)	
	Contribution to Gross Geographic Product/Gross value added	Economic impact calculated
<b>Social Cohesion &amp; Community Development</b>	Artist/Producer demographics (diversity)	Organiser data and Programme
	Artist/Producer origins (diversity)	
	Audience diversity	Audience survey
	Cultural offerings (Local arts/heritage/languages)	Organiser data and Programme
	Audience opinions	
	Marketing & Place identity	
<b>Reflective &amp; Engaged Citizens</b>	Appreciation of diversity	Audience survey
	Social capital & fostering dialogue	

An interesting feature of the NAF research is that it is part of a long series of such studies conducted by the same team leaders over many years. As will be demonstrated in the results and discussion, the advantage of having ongoing research is that it makes comparison across time possible. Such comparisons can be used to demonstrate, for example, changes in the demographics of festival-goers (traditionally referred to as “festinos” at the NAF), changes in ratings of Festival activities, and changes in average opinion scores. Time series data can be a useful and important way to track the progress of an event and to monitor the impact of, for example, programme and organizational changes.

### 3. Results

#### 3.1 The Demographics of Respondents

As in previous years, the sample size on which this study is based was more than 600. 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. It can thus be concluded that the sample of people interviewed, and who completed the self-completion questionnaires, represents the population fairly well<sup>1</sup>. Of the total sample, 17% (100) were local Grahamstown residents and 83% (512) were visitors from outside Grahamstown.

Table 2: Festino Demographics: Gender and language

	2006	2013	2016
<b>Sample size</b>	669	682	612
<b>Women (%)</b>	59.4	54.2	59.6
<b>Men (%)</b>	40.6	45.8	40.4
<b>Afrikaans (%)</b>	11.4	10.5	14
<b>English (%)</b>	64.2	60.6	65
<b>Xhosa (%)</b>	10.9	14.7	9.5
<b>Zulu (%)</b>	4.2	3.1	5.3
<b>Other (%)</b>	9.3	11.1	6.2

As shown in Table 2, there do not appear to be any significant differences between the gender or home language groups of festinos in the three most recent studies. There are still somewhat more women than men who attend (nearly 60%), and the largest home language group is still English. There is was a small decline in the percentage of Xhosa speakers, but this is offset by the increase in Zulu speakers. Taking into account the “Other” group (which included mostly African languages), just over 20% of festinos spoke an African language at home. Language results accord with the race groups of festinos in

<sup>1</sup> Despite the quota, the demographics of the sample do change from one study to another, partly because of the variability of self-completion questionnaire returns, which may have some impact on results. The 2016 sample differs from the 2013 sample by, for example, having a smaller percentage of Grahamstown locals (16% of the sample in 2016, compared to 20% in 2013) and being somewhat older (61% of the sample in 2016 were older than 35, compared to 40% in this category in 2013). One way of controlling for this is to report results for different demographic categories (for example, visitors versus locals), which is done in several places in this report.

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the sample: 22% were black, 70% white, 7.5% coloured or Indian, with the remaining 0.5% being a mix of categories such as Asian and Mexican.

Also as found in previous studies, the vast majority of festinos were South Africans (Table 3). An interesting difference from previous years is that a smaller percentage were from within the Eastern Cape, with increases in the proportion of visitors from other provinces, particularly Gauteng (24%), Western Cape (22%) and KwaZulu-Natal (10%). This speaks to aims of organisers in holding a truly national festival attended by people from all over South Africa.

Table 3: Festino origins

Country of permanent residence	2013 (%)	2016 (%)
<b>South Africa</b>	91	94
<b>Elsewhere in Africa</b>	2	2.4
<b>Other</b>	7	3.6
<b>South African's home province</b>		
<b>Eastern Cape</b>	46	33
<b>-Grahamstown</b>	20	16
<b>-Other Eastern Cape</b>	26	17
<b>Gauteng</b>	21	24
<b>Western Cape</b>	19	22
<b>KwaZulu-Natal</b>	7	10
<b>Free State</b>	3	2.5
<b>Other</b>	4	8.5

Festino age groups are partly controlled by the interview quota, with periodic checks from interviewers in terms of what they perceive to be the population. Figure 2 shows that nearly 40% of those interviewed were younger than 35 (21% between 18 – 25; and 18% between 26 – 35). About a quarter were 36 – 50 years old, with the remainder being in older age groups (22% 51 – 60; 13% 65+). Compared to previous samples, the 2016 sample is thus a somewhat better mix of different age groups.

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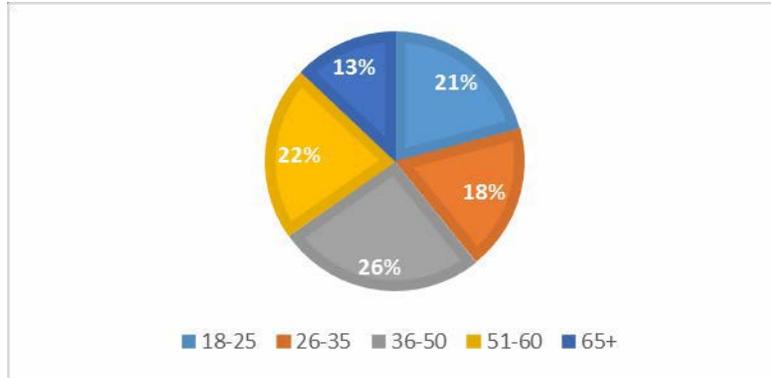


Figure 2: Festino Age Groups

About a third (33.5%) of festinos were in professional or management jobs – somewhat more than was found in 2013 (Table 4). Other changes were the decline in the proportion of students (from 27% to 15%) and the increase in the number of retired people (7% to 13). This change is also reflected in festino age groups (Figure 2).

Table 4: Festino Employment

Employment category	2013 (%)	2016 (%)
<b>Professional/management</b>	24	<b>33.5</b>
<b>Administration</b>	7	<b>6.5</b>
<b>Civil Servant</b>	6	<b>3.5</b>
<b>Self-employed</b>	14	<b>17.0</b>
<b>Technical/Sales</b>	3	<b>2.3</b>
<b>Student</b>	27	<b>15.0</b>
<b>Retired</b>	7	<b>13.0</b>
<b>Unemployed</b>	3	<b>2.0</b>
<b>Other</b>	<b>9</b>	<b>7.4</b>

As expected with such a big proportion of the sample in professional or managerial positions, education levels were also high (Table 5).

Table 5: Festino Education

Highest level of education	Percentage
High school	12.8
Apprenticeship/short course/professional qualification	15
One diploma/degree	37.6
More than one diploma/degree	34.6

Results show that nearly 38% of respondents had one degree or diploma, with a further 34% having more than one degree and/or diploma. The sample was thus even more highly educated than was found in the 2013 study, when 65% of respondents had one or more diploma and/or degree.

As in previous surveys, some festinos declined to give information on their net monthly household (17%) or individual (14%) income categories.

Table 6: Festino Demographics: Household and individual Net Monthly Income

Net HH Income p/m	% in category	Net Individual Income p/m	% in category
Declined to answer	17	Declined to answer	14
< R5000	5	< R5000	9
R5001 – R10 000	10	R5001 – R10 000	15
R10 001 – R20 000	13	R10 001 – R20 000	18
R20 001 – R30 000	20	R20 001 – R30 000	18
R30 001 – R40 000	15	R30 001 – R40 000	12
R40 001 – R60 000	21	> R40 000	14
> R60 000	<1%		

Of those festinos who answered the question, 66% reported a household income of more than R20 000 p/m after tax (compared to 64% in 2013), and 43% reported a household income of more than R30 000 p/m after tax (compared to 39% in 2013). For individual income, of those who answered the question, 61% reported having a monthly after tax income of more than R20 000.

### 3.2 Festino Activities

The average number of ticketed shows attended per person increased somewhat to 7.2 for local residents and 10.6 for visitors (compared to an average of 6.4 for locals and 8.2 for visitors in 2013) as shown in Table 7.

Table 7: Attendance at Festival Activities

Average number attended (Median in brackets <sup>2</sup> )	Locals	Visitors	Total
<b>Ticketed shows (median)</b>	7.2 (7)	10.6 (9)	10.2 (8)
<b>Ticketed shows attended “today”</b>	1.4 (1)	2.3 (2)	2.2 (2)
<b>Free performances</b>	1.6 (0)	0.9 (0)	1 (0)
<b>Visits to craft markets</b>	2.2 (2)	1.6 (1)	1.7 (1)

Respondents were also asked how many ticketed show they were attending on the day of the interview (“today”). As expected, visitors had a higher average attendance on the interview day (2.3, compared to 1.9 in 2013) compared to local residents (1.4, compared to 1.1 in 2013). However, local residents, who typically attend the Festival over a longer period, attended significantly more free shows (1.6) compared to visitors (0.9) and also paid more visits to the craft markets.

Since Jazz has become such an important part of the NAF, there were two questions about this part of the event. In total, 44% of respondents said that they would be attending at least one jazz show at the 2016 NAF (compared to 42% in 2013), with another 8% still being undecided on the day of the interview. Forty percent of respondents also reported that they had attended a jazz festival outside of the NAF (the same percentage as in 2013), providing evidence for the ongoing popularity of this musical genre.

An important aim of the NAF is to encourage artistic excellence and development of young South African artists. The Young Artist Awards are thus an important part of the event. The winners are announced in the programme and are featured on the Main part of the Festival. Nearly half (48%) of respondents said that they would be going to productions or exhibitions featuring the Young Artist Award winners in 2016, with a further 17% being unsure on the day of the interview. The result demonstrates a high degree of awareness of the programme amongst festinos and speaks to the power of the award in attracting audiences and giving exposure to winners.

<sup>2</sup> Average numbers can be skewed either up or down by a few very high or low numbers, so the median is also reported. While median values were somewhat lower than averages for all categories, they do not appear to be very different, indicating that the average numbers are fairly reliable.

### 3.3 Festino Spending

Spending data (Table 8) showed that reported average spending for visitors was R5 841 and R2 195 for local residents (defined as spending in addition to normal monthly expenses). Median values are shown in brackets, “n” denotes the number of people who answered the question.

Table 8: Average Festino Spending

	Accommodation	Tickets	Food & Drinks	Shopping
<b>Locals</b>	n/a	962	732	723
<b>Visitors</b>	2 793	1 778	1 510	790
<b>Total</b>	2 332	1 644	1 383	779

Average spending on **accommodation** by visitors was of R2 793 for a group size of 1.8 (1.7 in 2013) and for a stay of 5.3 nights (5.4 in 2013). However, this included a large proportion of those who did not pay for accommodation because they were day visitors who came from nearby towns or were staying with family or friends. In fact, only 56% of visitors reported paying for accommodation. For those who paid, the average was R4 876, which works out at an average of R511 per person sharing per night. However, this average also includes those who were staying with family or friends and who were making some small contributions to household expenses (the lowest spending figure for accommodation was R100), and a few very large groups, who may have had special rates. It should also be noted that the median group size was one, suggesting that the average is skewed upwards by a few large groups. For those who stayed in a Hotel or Bed and Breakfast, the average spending was R5 578.

Average spending on **tickets** was R962 for locals and R1 778 for visitors. These totals include the 14% of visitors and 23% of local residents who did not spend anything on tickets. Spending on **food and drinks** at the Festival was an average of R732 for local residents and R1 510 for visitors. **Shopping** was quite similar for locals (R723) and visitors (R790). This is not surprising, given that local residents have the whole NAF in which to shop and that they visited the craft markets on average 2.2 times, while visitors only went an average of 1.6 times. A small number of respondents reported spending in the “**other**” category, mostly related to transport (petrol, parking, paying car guards, tips), the overall average in this category being R60 per group.

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Table 9: Average Festino spending, group size and length of stay<sup>3</sup>

	Visitors	Local	All
<b>Average total spending</b>	R6 864	R2 768	R6 169
<b>Percentage who reported group spending</b>	32%	40%	39%
<b>Average Group size</b>	1.8 (Median = 1)	1.7 (Median = 1)	1.8
<b>Average Days</b>	6 (Median = 5)	n/a	6
<b>Average Nights</b>	5.3 (Median = 5)	n/a	5.3

While not directly the responsibility of Festival organisers, accommodation is the largest spending category for most visitors and is thus an important component of economic impact.

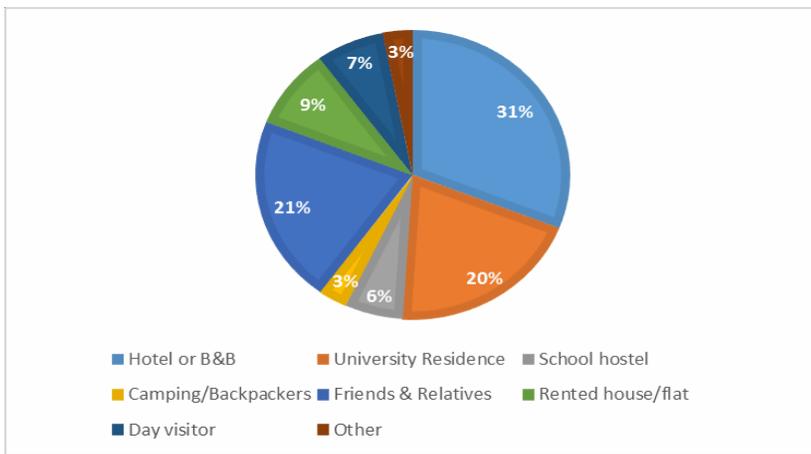


Figure 3: Festino Accommodation Choices

Compared to the 2013 results, a greater proportion of the sample stayed in Hotels or Bed and Breakfasts (31% in 2016 compared to 13% in 2013). There were declines in the proportion of visitors who stayed with Friends and Relatives (27% in 2013 to 21% in 2016), Rented House/Flat (14% in 2013 to 9% in 2016) and day visitors (9% in 2013 to 7% in 2016).

The NAF was the main or only reason for 87% of visitors coming to the Eastern Cape. For the remaining 13%, by far the most common additional reason for coming was visiting family and friends, followed by those taking a holiday and including the NAF as part of that.

<sup>3</sup> Note that total average spending does not add up to the spending categories in the previous table because “other” spending was not reported as a separate category, but was included in total spending.

Those festinos who did not normally live in the Eastern Cape were asked to estimate their non-Festival expenditure in the province. Excluding spending in Grahamstown, non EC festinos spent an average of R4 208 per travelling party in the Eastern Cape (similar to the 2013 average of R3 930). While not directly attributable to the NAF, additional spending in the province as a result of add-on holidays, or leisurely travel, presents an opportunity for leveraging further tourist spending. Spending categories included accommodation, food and transport.

### 3.4 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 10: Average Festino Ratings of Festival Experiences

Average Ratings	Accommodation	Restaurants	Main Shows	Fringe Shows	Craft Market
<b>Locals</b>	n/a	3.7	4.4	4.0	3.7
<b>Visitors</b>	4.0	3.9	4.4	4.0	3.8
<b>Total</b>	4.0	3.9	4.4	4.0	3.8

As Table 10 shows, festinos generally rated their experiences highly. A significant change is that more festinos rated shows on the Main programme as a 4 or 5 out of five (88% overall) than in 2013 (when 72% of local residents and 81% of visitors rated Main shows 4 or 5 out of 5). The same applies to Fringe show ratings, which, while having a lower average rating than Main shows (as was also found in previous studies) was rated as 4 or 5 out of 5 by 75% of festinos in 2016 (compared to 69% of visitors and 63% of locals in 2013). Both these results suggest that the core aspects of the NAF have improved over the last 3 years.

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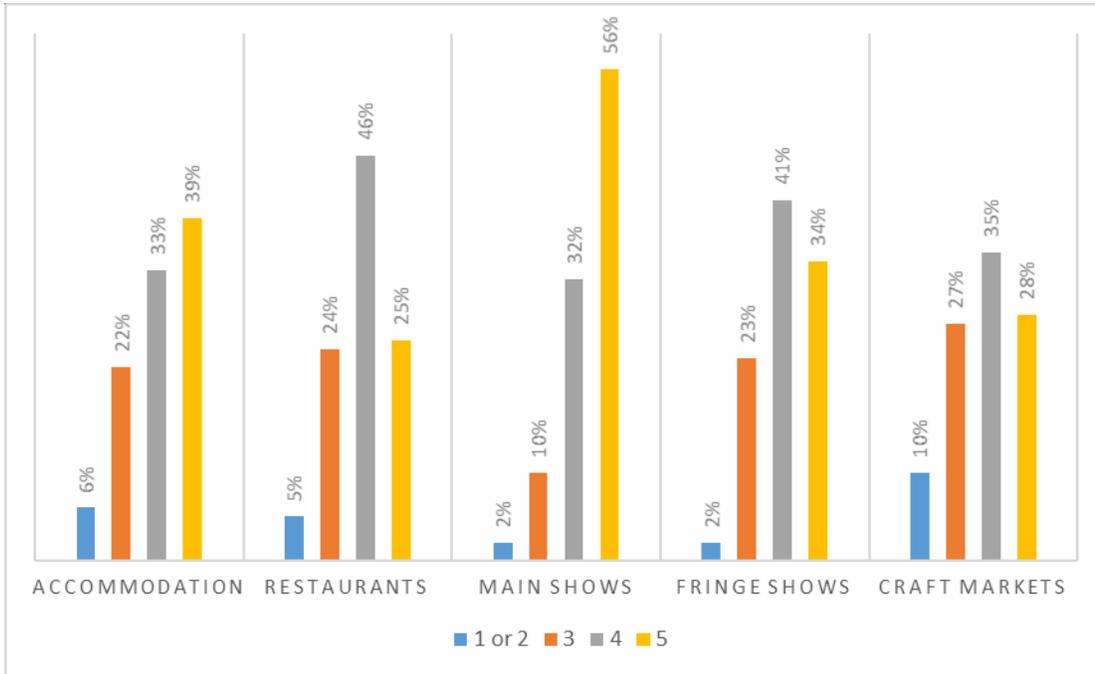


Figure 4: Festino ratings of Festival activities

Taking a more historical view (Figure 5), one can see that ratings for Main and Fringe shows, while always quite high, have been on an upward trend since 2004, with the Main show ratings increasing steadily from 3.8 in 2004 to 4.4 in 2016. Fringe show ratings are somewhat more volatile, but have increased from 3.3 in 2004 to 4 in 2016.

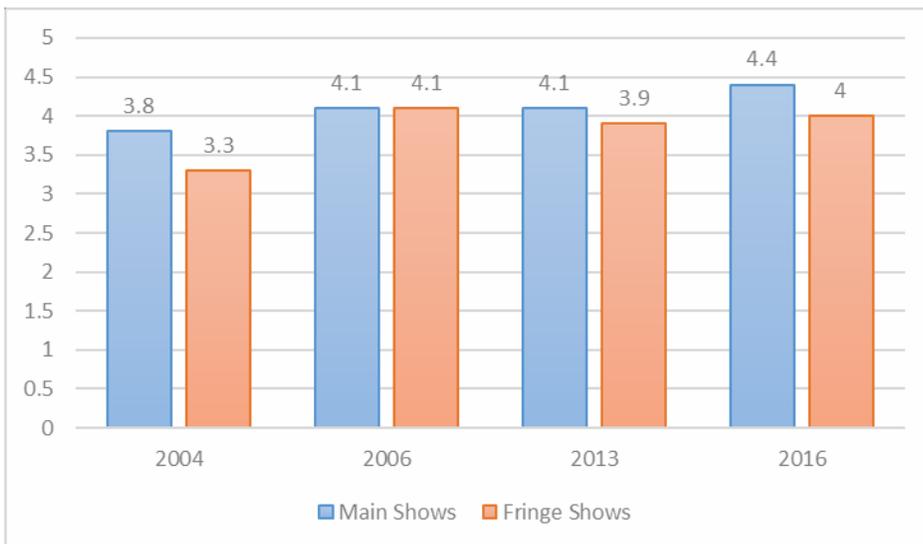


Figure 5: Historical average ratings for Main and Fringe shows

However, Festino ratings of craft markets have declined since 2013, when 70% of festinos rated the craft markets as either a 4 or 5 out of 5 in terms of value for money. In 2016, as shown by Figure 4,

only 63% of festinos gave this rating, with 10% rating it 1 or 2 out of 5. For accommodation, 72% rated it 4 or 5 (average score of 4). Only 25% of festinos rated restaurants as 5 out of 5, but a much larger percentage (46%) gave them 4 out of 5, with only 6% rating a 1 or 2, that is, poor or very poor.

Table 11: Previous Festivals attended and recommendations

Sample	Average previous Festivals	Recommend %
2006	4	99
2013	5.6	99
2016	6.7	99

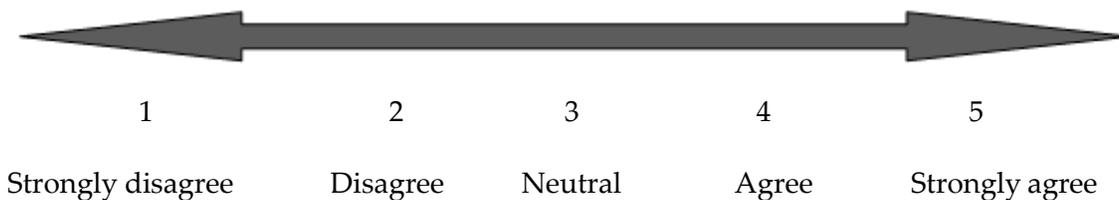
As shown in Table 11, the average number of previous Festivals attended is increasing over time, suggesting a loyal audience. The average number of previous Festivals attended by local residents was 11, while for visitors it was 6. Overall, festinos experience a very high level of satisfaction, with 99% saying that would recommend it to other people.

### 3.5 Festino Opinions

For the first time in 2013, the consumer survey included a section designed to measure the non-market socio-cultural impacts of the NAF. Based on the Edinburgh (2011) study, the aim of this section was to explore the impact of the NAF on such things as audience development, building social capital and inter-cultural understanding.

It has long been acknowledged that the arts have multiple roles to play in society, and that the value of cultural events, like the NAF, cannot be fully captured when represented only by financial impact (often referred to as “economic” impact).

Adapted from the 2011 Edinburgh Festivals study, the 2013 and 2016 NAF consumer surveys included a number of statements about the value of the NAF to which Festinos were asked to respond to 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:



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One of the important aims of the NAF is audience development and widening of the cultural experience, that is, in building cultural capital. There were three opinion statements designed to test to what extent the NAF achieves this aim:

- “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 haven’t experienced before” (“Risks”);
- “The Festival gives me the chance to see artists and events that I would otherwise not be able to see” (“Exposure”);
- “Festival shows have increased my understanding and enjoyment of arts and culture” (“Cultural capital”).

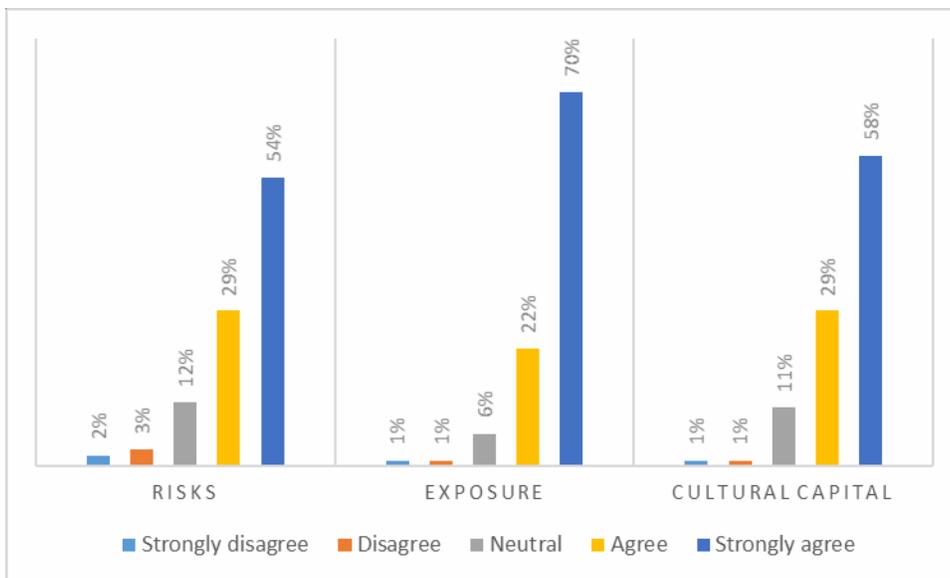


Figure 6: Festino opinions: Audience development

To the statement on taking **risks**, 83% of festinos agree or strongly agreed, a very similar result to the 2013 study (82% agreed or strongly agreed). To the statement on **exposure** to artists and events, 92% of respondents agreed or strongly agreed, compared to 81% in 2013. There has thus been a significant increase in the proportion of festinos who regard the NAF as an important way to gain exposure to artists and events that they would otherwise not be able to see. This category also had the highest percentage of responses in the “strongly agree” category. To the statement on **cultural capital** (increasing understanding and enjoyment), 87% of respondents agreed or strongly agreed, another big increase compared to 2013 (74% agreed or strongly agreed).

Building social capital and social cohesion are important national goals, as well as being important aims of the NAF. The three opinion statements design to measure these values were:

## The Impact of the 2016 National Arts Festival



- “The Festival provides me with new and interesting topics for socialising and talking about” (“Social capital”);
- “The Festival is an event where people from different cultures and backgrounds can meet and talk together” (“Social cohesion”);
- “The Festival increased my understanding of other cultures” (“Inter-cultural”).

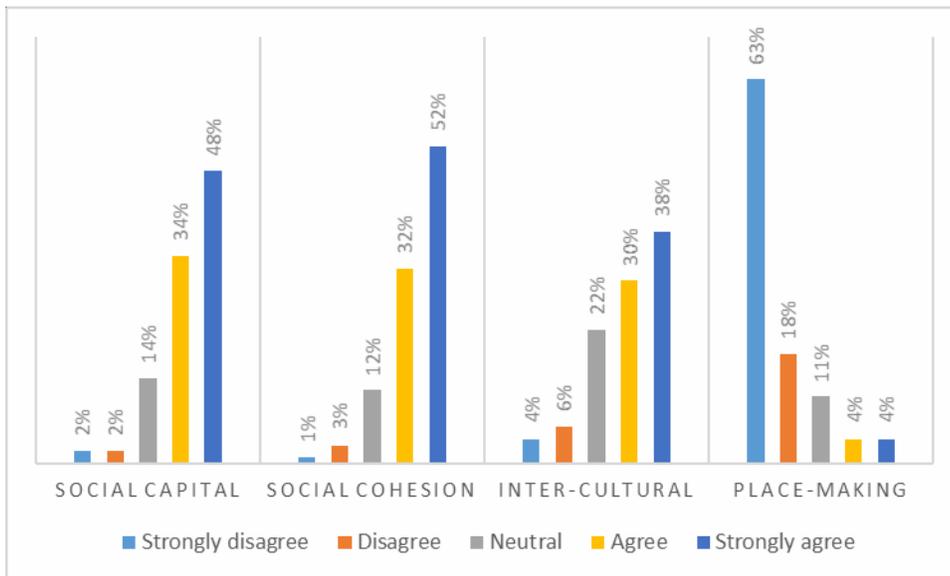


Figure 7: Festino opinions: Social capital and cohesion

For the statement on **social capital**, 82% of festinos agreed or strongly agreed that the Festival provided them with new and interesting topics for socialising and talking about. This compares favourably with the 2013 results, in which only 72% of people agreed or strongly agreed with this statement. The **social cohesion** statement received the lowest proportion of agreement in the 2013 study, with 69% of respondents agreeing or strongly agreeing. In 2016, this increased substantially to 84% who agreed (32%) or strongly agreed (52%) with this statement. While only 68% of festinos agreed or strongly agreed with the statement that, “The Festival increased my understanding of other cultures” (**Inter-cultural**), with a significant number being neutral (22%), which was still much higher than in 2013 (51% agreed or strongly agreed, and 35% were neutral).

Finally, “place-making” is an important part of festivals and events, but especially in small towns, like Grahamstown, where an event like the NAF can play a role in leveraging other tourist expenditure and in marketing. The statement designed to test this aim was phrased *negatively* in order to check that Festinos were responding thoughtfully to each statement, rather than, for example, agreeing with all of them: “The Festival is NOT an important part of what makes Grahamstown special” (**place-making**). 81% of festinos disagreed or strongly disagreed with this statement, compared to 79% in the 2013 study. Interestingly, local Grahamstown residents were less vehement in disagreement with the statement, with 76% of locals disagreeing or strongly disagreeing, compared to 82% of visitors.

Table 11: Average Festino non-market socio-cultural opinion scores in 2013 and 2016

	2013	2016
<b>Risks</b>	3.9	4.3
<b>Social capital</b>	4.0	4.2
<b>Exposure</b>	4.3	4.6
<b>Place-making</b>	1.7	1.7
<b>Inter-cultural</b>	3.6	3.9
<b>Social cohesion</b>	4.0	4.3
<b>Cultural capital</b>	4.1	4.4

Another way to interpret such opinion data is to examine average scores. Table 11 shows that, in every case (except place-making, which stayed the same), opinion scores improved between 2013 and 2016. What this indicates is that the role that the NAF is playing in terms of socio-cultural values is increasing over time.

### 3.6 Identification of Sponsors

The ability to attract sponsorship for arts, culture and heritage is an important part of the financial sustainability of a project. The greater the recognition of sponsors by audiences, the more satisfied sponsors will be. To investigate the feelings of festinos towards NAF sponsors, they were asked to not only list as many sponsors as they could, but also to answer the question, “How does the sponsor of an event make you feel about the sponsor on a scale from 1 to 5, where 1 is very negative and 5 is very positive.

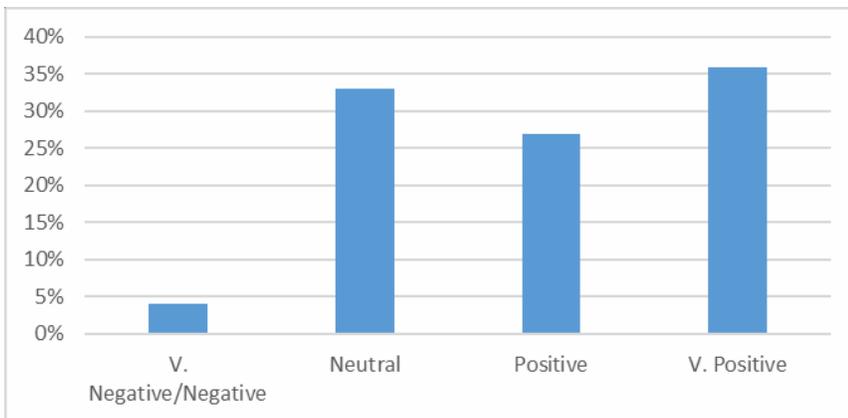


Figure 8: Feelings towards sponsors of an event

For the majority of respondents, sponsorship of an event made them feel either very positive (36%) or positive (27%) towards the sponsor. A third of respondents remained neutral (33%) and a very small minority (4%) felt negative or very negative.

Table 12: Identification of NAF sponsors (first 3 mentioned)

Sponsor 1 (%)	Sponsor 2 (%)	Sponsor 3 (%)
<b>Unable to identify: 28</b>	Unable to identify: 79	Unable to identify: 92
<b>Standard Bank: 61</b>	Standard Bank: 2.3	DAC/EC Gov/NAC: 3.3
<b>MNet: 4</b>	DAC/EC Gov/NAC: 4	Lottery: 2
<b>DAC/EC Gov/NAC: 3.3</b>	Lottery: 6.8	
<b>Lottery: 2.8</b>	MNet: 2.3	

About three-quarter of festinos were able to identify at least one NAF sponsor correctly. By far the most frequently mentioned sponsor was the Standard Bank, with 61% of festinos thinking of them first. Overall, 64% of festinos interviewed mentioned Standard Bank as a sponsor. Only about 20% of festinos were able to identify two sponsors, but a minority (2%) could identify four. The next most recognised sponsor overall were government agencies, such as the Department of Arts and Culture (DAC), the Eastern Cape Department of Sport, Recreation, Arts and Culture, and the National Arts Council, recognised by 14.5% of festinos. After this, the National Lottery was mentioned by 12% of festinos, followed by MNet, which was identified by a total of 6.3% of people.

### 3.7 Additional Comments

After completing the formal part of the questionnaire, festinos were asked if there were any other comments that they would like passed on the organisers. It is the nature of such comments that they tend to focus on the things that need improvement, and that not all of them are in the control of (or even the responsibility of) festival organisers. Nevertheless, we summarise them here:

#### Complaints

*Accommodation:* several comments mentioned that accommodation was difficult to book and expensive. The university residence booking system was described as “chaotic” and “problematic”.

*Navigation:* some festinos had some trouble finding the venues and suggested having the full address on the tickets, providing a map, more signage to venues, a cheaper programme, more street signs, and “optimising the app” for navigation (by including GPS co-ordinates) and adding restaurants to the app.

*Participation and Diversity:* quite a few comments referred to the segregation between the town and the festival. There were some calls to involve more local (Grahamstown) performers and upcoming artists, and that there should be more collaboration and cultural diversity. There were some complaints that moving the Village Green to the university fields had made the segregation worse and one suggestion that the Village Green should be “merged” with the Cathedral Square market.

*Water and Roads:* some festinos commented on the water outages that made life difficult, and the damaged pavements in some areas were also remarked on. One comment was simple “The state of Grahamstown”.

*Costs and quality:* A small group of comments were about the ‘high’ costs of shows and goods at the craft markets. Others gave quite specific feedback about particular venues, for example, that the sound in the Monument theatre was too loud, and that the Village Green lacked a “vibe”.

### *Compliments*

Compliments tended to be general, but included reference to quality and organisation. General comments included things like: “Gets better every year”; “Great work! Keep going”; “Never stop”; “Keep up the good work, it helps local residents get jobs!”; “Venues have improved and the transport around is easy” and “The festival is run so well”. While not mentioned often in official comments, feedback from the interview team was that festinos were using and enjoying the app very much.

## 4. Summary and Conclusions

The aim of this report was to explore the non-market values of the Festival to both local residents and visitors. Previous research has shown that the NAF provides considerable social and cultural values to attendees. However, because these are more difficult to quantify, they are less regularly reported than economic impact figures. In addition to valuing the impact of the NAF, one of the aims of this research was to test the Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage (SACO, 2016). The research design was thus based on the Framework.

Based on the Edinburgh (2011) study, Festinos were asked to respond to statements about the Festival using a Likert scale, where 1 meant “strongly disagree” and 5 meant “strongly agree”. Results showed that the NAF plays an important role in audience development, through increasing the enjoyment and understanding of culture and the arts. Festino valued the opportunity to see artists and events not otherwise able to be seen and through encouraging Festinos to take risks and experience new art forms.

The NAF 2016 also played a positive role in increasing social cohesion through providing a space in which people from different backgrounds and cultures can meet and communicate as demonstrated by comparisons to the NAF 2013. To a lesser extent, the Festival also improves cross-cultural understanding. Both of these aims are important for a functioning democracy.

Ninety-nine per cent of those interviewed would recommend the event to others.

Table 13: Summary of the Results of Cultural Value Themes for the NAF 2016

Theme	Indicators	Research Method
<b>Audience Development &amp; Education</b>	Demographics (Age groups; Cultural/Race groups; Gender)	59% women; 65% English; 20% African home language;
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)	94% SA; 2.4% Other Africa; 3.6% other than Africa;
	Income and Education Groups	36% income of R30k/pm +; 72% tertiary education;
	Participation & time-use	6 days at Fest
	Local residents vs Visitors	20% local; 54% other than EC
	Attendance at "new" kinds of ACH	82% agree or strongly agree
<b>Social Cohesion &amp; Community Development</b>	Artist/Producer demographics (diversity)	Data awaited
	Audience opinions	All categories increased since 2013.
	Marketing & Place identity	Social cohesion 84% agreed or strongly agreed Inter-cultural 51% agreed or strongly agreed

As shown in Table 13, the study presently reported on is the first part of a larger study, and provided indicators on two value themes from the Framework (SACO, 2016), which also aligned with the aims of the organisers. Evidence was strongest for “Human capital/professional capacity building” theme, demonstrating the important role that the NAF plays in making theatre, art available and in the process developing cultural identity and promoting social cohesion.

In summary, it may be concluded that the National Arts Festival 2016 met the social and cultural aims successfully fulfilling the desires of the organisations.

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