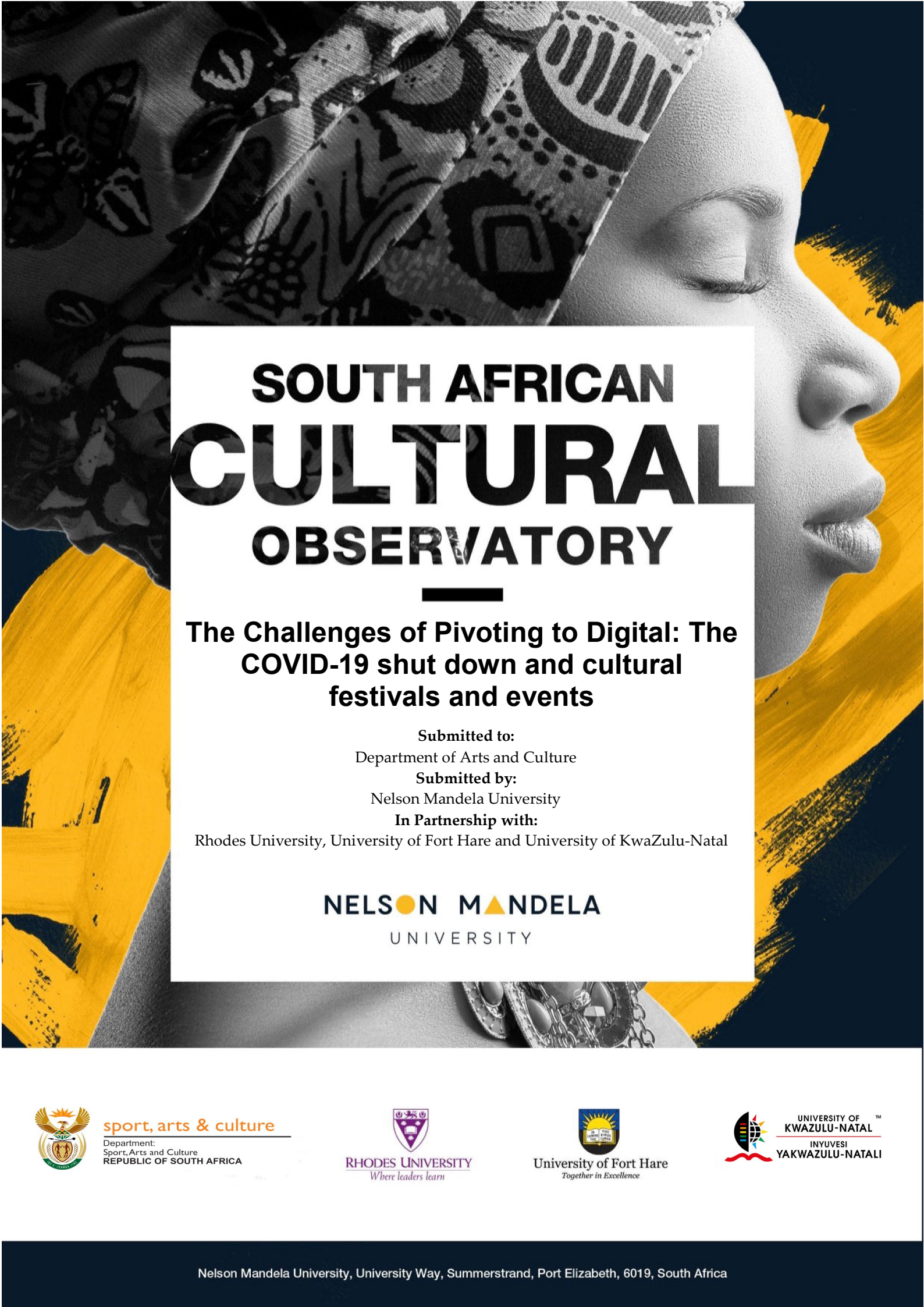




SOUTH AFRICAN CULTURAL OBSERVATORY

The Challenges of Pivoting to Digital: The COVID-19 shut down and cultural festivals and events

Submitted to:

Department of Arts and Culture

Submitted by:

Nelson Mandela University

In Partnership with:

Rhodes University, University of Fort Hare and University of KwaZulu-Natal

NELSON MANDELA
UNIVERSITY



sport, arts & culture

Department:
Sport, Arts and Culture
REPUBLIC OF SOUTH AFRICA



RHODES UNIVERSITY
Where leaders learn



University of Fort Hare
Together in Excellence



**UNIVERSITY OF
KWAZULU-NATAL**
INYUVESI
YAKWAZULU-NATALI

South African Cultural Observatory
Report

**The Challenges of Pivoting to Digital: The
COVID-19 shut down and cultural festivals and
events**

March 2021

Table of Contents

List of Figures and Tables	4
Executive Summary	5
1. Introduction	6
2. Goals and Methods	6
3. Background and context	8
4. Literature Review: Cultural Events and the Pivot to Digital	11
5. A review of business models used by online cultural events and festivals	15
6. The experiences of South African Festivals who made the online shift	18
6.1 The motivations for the shift to the digital environment	18
6.2 Business models in the online environment	19
6.3 The experiences of creatives and artistic producers	20
6.4 Audience experiences	22
6.5 Planning for the future: Sustainability and lessons learned	28
Lessons Learned	30
7. The implications of the findings	33
8. Conclusions and Recommendations	36
REFERENCES	38
Appendix: Survey instrument used for key stakeholder interview with festival organisers	42

List of Figures and Tables

Figure 1: Text used to call for participation in the online audience survey	8
Figure 2: UNESCO Framework for Cultural Statistics (2009)	9
Figure 3: GDP contribution and growth rates of the CCIs by domain (SACO Mapping Study, 2020) ...	10
Figure 4: Possible Business Models for Online Cultural Festivals and Events	16
Figure 5: Age groups of respondents to the online audience survey	24
Figure 6: Participation in free and ticketed shows	25
Figure 7: Rating of online cultural events by audience respondents	28
Table 1: The reduction in CCI business activity in South Africa in 2020 by domain	10
Table 2: Number and Type of online shows attended	25
Table 3: Spending on online cultural festival and event participation since lockdown	26
Table 4: What attendees enjoyed and did not enjoy about online cultural festivals and events	27

• Executive Summary

The main aim of the research was to investigate the impact and effectiveness of the pivot to online operation of South African cultural festivals and events for organisers, artistic producers and audiences as a result of the COVID-19 lockdown. The research methods included key stakeholder interviews with 13 South African festivals that had shifted their productions online as a result of the COVID-19 lockdown in 2020, as well as an online audience survey of people who had participated in such online cultural festivals or events.

For the majority of festivals, the shift to online production was a survivalist strategy done in order to maintain festival continuity, to support creatives, and to continue to deliver on their mandate to audiences and sponsors. Festivals that had already started to think about the online environment, and had some in-house expertise, found the shift to be more manageable and successful.

There are a wide variety of business models that can be used in the online environment, including freemium, subscription, sponsored, and ticket sales models. The majority of festivals in the sample used either free access or a mixture of ticket sales options and free access. None of them were able to monetise their content very effectively. However, those who already had ongoing relationships with their audiences via social media and other platforms, and who could leverage existing sponsorship relationships were more successful.

Artistic producers were very grateful for the opportunity to display their work and earn an income in a time when little else was available. Some saw the shift as an exciting opportunity to try out the new medium and reach new audiences. Others were less enthusiastic about the limitations of the online environment, and struggled to access the skills, technology and bandwidth needed to produce effectively online.

An important finding is the extent to which those festivals with resources were able to support artistic producers through things like providing facilities for filming and studio-space for “live” performances and providing skills training and advice for the shift to online delivery.

Audiences were relatively enthusiastic about being able to access cultural content online, and the majority of them said they would continue to do so in the future. They consumed a mix of South African and international content. However, they clearly missed the “vibe” and excitement associated with live events, and more than half of them spent only R100 or less on online cultural participation since the lockdown began in March 2020. Limiting factors were the poor quality of sound and visuals when accessing content on devices like mobile phones and laptops, as well as the cost of data and slow internet speeds.

Reflecting back on their experiences, festival organisers of those events that pivoted to the online environment were able to provide a number of “lessons learned”.

Key Findings

• • •

- Reasons for shifting to the online environment included festival continuity and support to artistic producers.
- Given the increased level of competition in the online space, ongoing marketing, and establishing long-term relationships with stakeholders will be key to financial sustainability.
- None of the festivals in the sample were able to generate significant revenue from online sales.
- Festivals provided very effective support and expertise to artistic producers – an area that could be expanded.
- There are significant fixed costs associated with shifting online, which smaller community-based events struggled to cover.
- Audiences were appreciative of online content, but had low levels of spending and missed the excitement and socialising associated with live events.
- Going forward, it is recommended that events that have shifted online be supported to develop their international competitiveness.

1. Introduction

The COVID-19 lockdowns imposed during 2020 to contain the pandemic have negatively affected all of the domains of the Cultural and Creative Industries (CCIs). According to a study by the South African Cultural Observatory (SACO, 2020), the cultural and creative industries (CCIs) in South Africa directly contributed 1.7% to South Africa's economy before the COVID-19 crisis and grew at an average rate of 2.4% per year, which is much faster than the rest of the economy.

The CCIs buy inputs from other sectors, and people employed in the CCIs spend their income. If one includes these so-called "multiplier" effects (the forward and backwards linkages in the economy), then the CCIs have a total impact (or effect) of R241.8 billion (5.6% of GDP). Including people in creative jobs, as well as those in support jobs, the cultural economy employed more than a million people.

An early assessment by SACO (2020) of the impact of the COVID-19 lockdown estimated that almost all (95%) of respondents had experienced cancellation or indefinite postponement of work scheduled between the start of the survey and the end of 2020. All expected a fall in their normal business activities of between 50% and 85% (depending on the sector). For many, pivoting to doing business online was a very important adaptation strategy.

This is especially true of the "Performance and Celebration" domain (using the UNESCO FCS definition, 2009), which includes all live events, and was found to be one of the most vulnerable domains because of the high levels of face-to-face operation, and the prevalence of freelance and informal work (SACO, 2020).

An important part of the Performance and Celebration domain are cultural events and festivals. These events generate income and employment for artistic producers, technical staff, and economic impact for host cities. They help to build social cohesion and audience demand and showcase and develop South African talent (Snowball and Antrobus, 2020).

Many South African cultural festivals have employed innovative adaptation strategies, including shifting their events online, in order to continue during the COVID-19 lockdown period in 2020. However, to date, there has been little research on the impact and effectiveness of such strategies, and how they might change festival and event business models and planning in the future.

2. Goals and Methods

The main aim of the research is to investigate the impact and effectiveness of the pivot to online operation of South African cultural festivals and events for organisers, artistic producers and audiences. Sub-goals include:

- An assessment of factors that motivated and enabled the shift to the digital environment;
- An overview of the business models for cultural events online and which were most commonly used;
- An assessment of the impact of the shift on artistic producers in terms of both content development and an opportunity to earn income;
- An indication of how audiences experienced online cultural events;
- Identification of challenges, opportunities and “lessons learned” from those events that pivoted to the online environment.

Research methods were largely qualitative. In addition to a review of relevant South African and international documents, including journal articles, SACO reports, and industry research, data collection included interviews with 13 South African festival organisers, and 65 responses to an online questionnaire directed audiences.

Based on desktop research, South African festivals that had pivoted to the online environment in 2020/1 as a result of the COVID-19 lockdown were identified, and 13 consented to be interviewed. They were:

- AfrikaBurn
- Baroque in the Bush
- Basha Uhuru
- Bastille Festival
- Comic Con Africa
- Hermanus FynArts Festival
- Hilton Arts festival
- Innibos National Arts Festival
- Klein Karoo National Arts Festival
- Knysna Oyster Festival
- National Arts Festival
- Silver Mountain Music Festival
- Vrystaat Arts Festival

The audience survey was conducted online, and is available here: tinyurl.com/23x7lh7m It was distributed via SACO social media platforms, as well as being sent to the SACO database via email.



Figure 1: Text used to call for participation in the online audience survey

The online audience survey included questions on the frequency of participation, the kind of events attended, spending on online audience events, aspects of online participation that were particularly enjoyed or not enjoyed, access to online events, and the demographics of respondents.

The rest of the report is structured as follows: Sections 3, 4 and 5 are based on existing data, and put the research in context, explaining how it fits into the UNESCO domains used to define and measure the creative economy, reviewing international literature on digital production and consumption in the Performance and Celebration domain, and reviewing possible business models that could be used in the online environment. Section 6 gives the results of the key stakeholder interviews with festival managers, and the online audience survey. Section 7 analyses the data, and discusses the implications of the findings, and Section 8 concludes.

- **3. Background and context**

There are a number of ways in which the cultural and creative industries (CCIs) can be defined and measured. South Africa is currently using the UNESCO Framework for Cultural Statistics (FCS, 2009) to classify and define the sector. The FCS divides the sector up into six main Domains, which together make up the Cultural and Creative Industries: Cultural and Natural Heritage, Performance and Celebration, Visual Arts and Crafts, Books and Press, Audio-visual and Interactive Media and Design and Creative Services. In addition to these, there is the Transversal Domain of Intangible Cultural Heritage; and three Transversal Domains, which include Education and Training; Archiving and Preserving; and Equipment and Supporting

Materials. The focus of this research is in Domain B: Performance and Celebration, which includes performing arts, music and festivals.

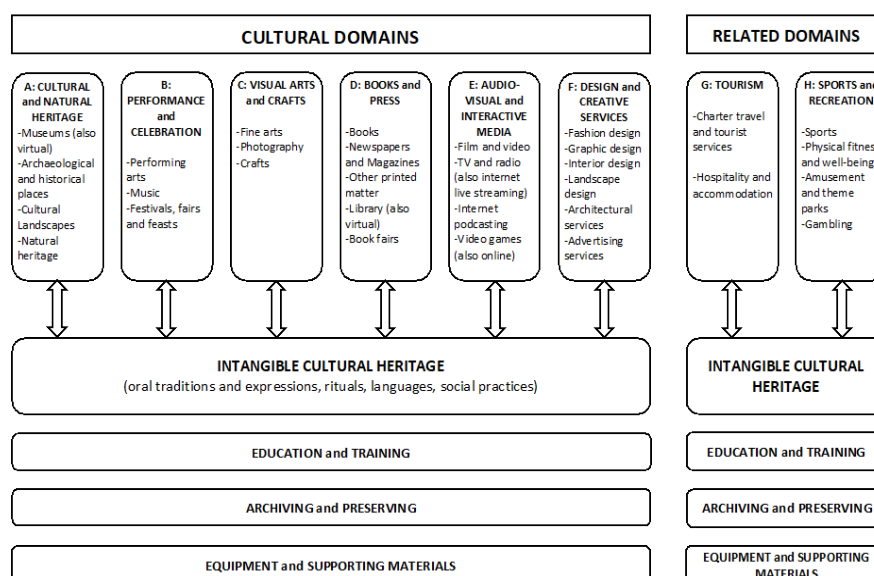


Figure 2: UNESCO Framework for Cultural Statistics (2009)

According to the most recent mapping study of the CCIs in South Africa (SACO, 2020), in 2018, the CCIs directly accounted for 1.7% of South Africa's GDP (R74,39 billion, up from R62 billion in 2016) and grew at a real rate of 2.4% per year between 2016 and 2018, which is twice as fast as the rest of the economy. When multiplier effects are included (that is, the forward and backward linkages of the CCIs to other parts of the economy), the CCIs accounted for 5.6% of South Africa's GDP. Using the cultural trident method (which includes people in cultural occupations working in the cultural sector as well as working in non-cultural firms, as well as people in non-cultural occupations working in cultural firms), the creative economy provided 7% of all jobs in South Africa (an estimated 1.14 million jobs) in 2017, up from 6.72% in 2016.

Performance and Celebration contributed 7% of the CCI's share to South Africa's GDP and had one of the fastest growth rates (3.4%) in the CCIs and it makes up 5% of CCI employment.

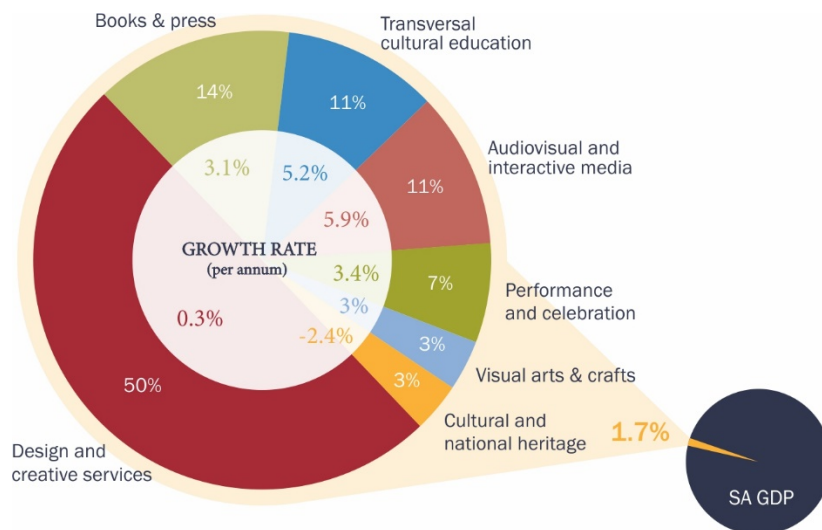


Figure 3: GDP contribution and growth rates of the CCIs by domain (SACO Mapping Study, 2020)

Early in the 2020 lockdown, an impact survey study was undertaken by the South African Cultural Observatory, which sought to assess the impacts and adaptation strategies used by the cultural and creative industries. The study included an analysis of each domain (based on the UNESCO Framework for Cultural Statistics 2009). Overall, the study estimated that the reduction in creative economy business activity would reduce South Africa's GDP by R99.7 billion in the year 2020 (SACO, 2020)

Of all the CCI domains analysed, the Performance and Celebration domain, which includes all live performing art and festivals, experienced the largest negative impact, as a result of the lockdown (SACO, 2020). What makes the domain particularly vulnerable was the mostly face-to-face production, and that there is a high proportion of freelancers, who work on short-term contracts that can easily be cancelled (SACO, 2020). The report estimated that the percentage reduction in business activity for the Performance and Celebration domain in 2020 was 55.6%.

Table 1: The reduction in CCI business activity in South Africa in 2020 by domain

Domain	Impact (Percentage reduction in business activity in 2020)
Cultural & Natural Heritage	-44,8%
Performance & Celebration	-55,6%
Visual Arts & Crafts	-44,5%
Books and Press	-36,1%
Audio-Visual & Interactive Media	-44,7%
Design & Creatives Services	-35,1%

The decrease in government funding to the CCIs in many countries over the last decade has increased the proportion of freelance, short-term and contractual work in the sector (Banks, 2020). Unlike permanent employees, freelance workers do not have, nor belong to, labour unions, and also do not qualify for other forms of social security such as employer-supported medical aid, or unemployment insurance. This makes them vulnerable to shocks, and they are unable to adjust and adapt easily. Comunian and England (2020) argue that it is in fact this precariousness of cultural employment, which had previously been ignored, that was exposed by the COVID-19 pandemic. Creative workers in many countries have been unable to access government support, as some requirements (for example, good tax records) deem many of the workers ineligible, given the informal nature of much of the cultural work (Comunian and England, 2020). In South Africa, of all people employed in cultural occupations, 46% are in the informal sector, with a further 34% being freelancers (Hadisi and Snowball, 2020). The project-based nature of much of the work in the Performance and Celebration domain makes informal and freelance work particularly prevalent in this sector.

4. Literature Review: Cultural Events and the Pivot to Digital

As a means to control, manage and slow the spread of the COVID-19 virus, the South African government initiated a nation-wide lockdown, which saw a reduction in social contact and interaction, beginning in March 2020. This also applied to many other countries in Africa and the rest of the world. This particularly affected the operation of the live performing arts, as discussed in section 3. One of the most common adaptation strategies was a shift to the online environment.

In response to the COVID-19 pandemic, some governments offered stimulus packages to artists and cultural workers, to encourage them to move their work online. Kenya, through its Ministry of Sports, Culture and Heritage, released Ksh. 100million (US\$ 944 287) to artists; although the condition attached to the recipients of this fund was that they had to continue providing entertainment through TV and the internet (Joffe, 2020).

In Argentina, the Ministry of Culture released 7.2 million Pesos to artists, to encourage them to create and produce digital content. A "Culture at Home" project, through an existing digital platform was established, which allowed artists to produce work online (SACO, 2020). Canada also adopted the strategy of producing new online works, by providing CA\$1 million of funding for the creation of "Digital Originals", again, to encourage artists to move their work to online platforms for online audiences (Government responses to Covid-19, 2021 in SACO, 2020). Singapore, whilst not adopting the strategy of commissioning new works online, did, nevertheless, support online production and consumption of culture through administering a new fund, the Fund for Digitisation of Arts and Culture Content, that would assist artists in

moving and presenting their works online (Government responses to COVID-19, 2021 in SACO, 2020).

The shift to digitisation has also highlighted the potential that exists in the digital sector (Nzeza Bunketi Buse, 2020), and how lucrative it may be. It is no wonder then that several African countries have incorporated digitisation and ICT support, either as a solution, or as a recovery plan (or some combination of the two), post COVID-19. Kenya, Uganda, Namibia and South Africa have all suggested adjusting business models of CCIs to incorporate digitisation and ICT in a post C-19 era (Nzeza Bunketi Buse, 2020); it is expected that several other countries will follow suit.

Worldwide, several festivals, instead of cancelling or postponing, took to online platforms. In South Africa, the National Arts Festival (NAF), the largest arts festival of its type in Africa (NAF, 2021) and oldest in the country, held annually in Makhanda in the Eastern Cape, for the first time since its inception in 1946, was, in 2020, held online. It was decided that, rather than cancelling the event, it would be ported to an online platform on its website (NAF, 2021). The virtual attendees would need to purchase tickets and passes, which would allow them virtual access and attendance to the shows from whatever device, provided it had internet capabilities, and whenever, provided it is within the stipulated days of the festival.

In Canada, one of the main music festivals in Ottawa, the CityFolk music festival, also happened virtually (Ottawa News, 2021). As with the NAF, attendees had to purchase tickets and passes, which would allow them access to the shows. Whilst some festivals that moved to online platforms required visitors to first purchase tickets online, others granted free access, but provided an option for donations to be made to artists (Creative Capital, 2021).

Other social media platforms also displayed solidarity with those working in cultural and creative occupations. For example, Facebook introduced an option to charge for live streaming events aired via the site; "You'll be able to mark Facebook Events as online only and, in the coming weeks, integrate Facebook Live so you can broadcast to your guests. To support creators and small businesses, we plan to add the ability for Pages to charge for access to events with Live videos on Facebook – anything from online performances to classes to professional conferences" (Facebook, 2020).

Online cultural consumption

Until recently, only live cultural participation had been studied extensively, with online cultural participation being given minimal attention (Delavega-Suarez *et al.*, 2018). However, the shift to online platforms as a result of the global COVID-19 pandemic, has made online cultural participation a major concern and area of study.

Previous studies (Delavega-Suarez *et al.*, 2018; Ekelund and Ritenour, 1999) conclude that performing arts have been found to be time-intensive, and so offset by a higher opportunity cost of time. One potential advantage of online cultural consumption and participation essentially means that one is able to consume culture at any time, as long as one has an internet connection, and a device that is capable of connecting to the internet.

Internationally, the shift to online cultural consumption had already started to take place before the lockdown, albeit at a slow pace; the onslaught of the COVID-19 pandemic has hastened the process (Nobre, 2020). Online cultural participation and consumption has an advantage of enabling content to reach a much wider audience base. In essence, online participation "...exposes little-known...micro-cultures to a larger, newer and geographically more dispersed audience, giving cultural diversity a whole new level of expression" (Lee *et al.*, 2020), and further allows the inclusion of audiences that previously felt excluded (Jess-Cooke, 2020).

A counter argument is that the dominance of a few, large online content platforms may, in actual fact, lead to a wane in diversity, as it is bound to benefit the performers and users of more advanced technologies of the west, thereby giving rise to a global "mono-culture", and simultaneously disadvantaging the less technologically endowed nations (SACO, 2020).

The Digital Divide

Whilst some festivals and live performing arts did indeed shift to an online platform, it is estimated that the majority did not. In the cultural and creative industries in general there has been a minimal shift to online platforms, with "the bulk of informal sector activity [being] suppressed during the lockdown period" (Arndt *et al.*, 2020: 4).

Some festivals have adopted other innovative ways to continue operations. For example, the Suidoosterfees festival in Cape Town reignited the classic yet long-outdated drive-in theatre concept at the Atlantic Studios in Cape Town. The audience watched the performance on a live-outdoor stage, from their vehicles, and tuned into a radio frequency to listen to the soundtrack (Atlantic Studios, 2021). This concept seems to have also been adopted by film festivals in Venice, Toronto, Telluride and New York (Keegan, 2020 in The Hollywood Reporter, 2020).

Whilst the response by some festivals and cultural players to move onto online platforms has been warmly welcomed, it has nevertheless also highlighted the digital divide that exists in South Africa. Whilst the shift was necessitated by the C-19 pandemic, SAILA (2020) argue that some are unable to afford the technology including laptops, smartphones and internet, that would otherwise enable them to access online content. Another factor that highlights the digital divide is the weak ICT infrastructure, particularly in the less developed rural areas of the country (SAILA, 2020), which would make access to online content more challenging, and

more expensive. Whilst it is acknowledged that there was some sectoral support shown, for example, when MTN and Vodacom both reduced their data prices (Business Day, 2020), the rise in job losses and consequent unemployment (StatsSA, 2020) might still render the online content expensive for some and highlight the present digital divide.

Another significantly negative impact of the shift of festivals and cultural events to online platforms is on the economic and GDP contributions to the impact areas, measured by the economic impact study. The economic impact is a means of capturing the additional market transactions as a direct result of an event taking place in an area, and it aims to answer the question, "If the event had not taken place, what would the loss of revenue to the impact area have been" (Snowball, 2008). For many festivals and cultural events worldwide, this question became relevant in 2020, with the cancellation of major events due to the COVID-19 pandemic. While the shift to the online environment provided some benefit for artistic producers and audiences who could produce and access the content, the regional economic impact of tourist and organiser spending associated with the events was lost.

For example, in the case of the National Arts Festival, the economic impact in 2019 on the host city of Makhanda (Grahamstown) was R85.9 million, and at R214.9 million on the Eastern Cape province as a whole (Snowball and Antrobus, 2019). The festival not physically taking place meant that most of this economic activity was lost to the region.

Mair (2020) argues that post COVID-19, there are four possible outcomes that may exist with regards to festivals; "a descent into barbarism; a robust state capitalism; a radical state socialism; or a transformation into a big society built on mutual aid". The most favourable outcome would be "transformation into a big society built on mutual aid" (Mair, 2020), where networks and links have been built and established, to safeguard the vulnerable artists (Davies, 2020). The shift to online cultural participation has also reinforced the original motive for producing and attending festivals and cultural events; that of 'art for art's sake', as opposed to making it a trend, and bolstering the eminence of celebrities, to the detriment of the little-known artists (Davies, 2020).

Equally important to consider though, is the sustainability of online festivals. Key to understanding this is the audience perceptions, both of the online shifts, as well as of the resumption of live events. In an online survey of UK art attendees, of 86 000 respondents, 41% acknowledged that at the resumption of online events, they would wait for at least four months before attending one, compared to the 19% who said they would immediately attend one (Rainer, 2020). An important finding from the survey was that most respondents would, either way, feel safer if measures to ease the spread of Covid-19, such as social distancing, were put in place (Rainer, 2020). It is therefore prudent to assume that a shift back to live

cultural participation, will necessarily require COVID-19 measures to be put in place, and is unlikely to occur as soon as the lockdown ends.

5. A review of business models used by online cultural events and festivals

Membership subscription

The membership subscription model is one of the most popular when it comes to online content business models, and it has recently been adopted by artists and other creatives in light of the COVID-19 pandemic and its attendant restrictions. In this model, a recurring fee is charged per person monthly or annually for continued access to the online content (Campbell, 2020). The model is used by various industries such as print media for newspapers and magazines, the beauty industry selling bundles of customised beauty products to subscription members, and streaming platforms such as Netflix, to name a few. This model has been adapted in various ways by artists and entertainers seeking to maintain their livelihoods in the face of the ongoing pandemic, which has halted social gatherings. In the age of social media influencers, the membership subscription model has been popularised through platforms like YouTube where channel members pay a monthly fee to access 'member-only perks' such as customised emojis, access to live chats with the owner of the channel, and access to exclusive behind-the-scenes content which is not included in the free videos (Browne, 2018; Perez, 2018; YouTube Creator Academy, 2021). Another way entertainers can maximise their revenues through YouTube is by using the "premiers" feature, where channel members engaging with the video content can leave comments but have to pay a fee to get their comments noticed by the owner of the channel (Perez, 2018). Creators are also allowed to sell merchandise emblazoned with their favourite phrases or likeness directly to channel members on the YouTube platform (Browne, 2018; Perez, 2018). These additional features add to the revenue that the owners of the channels already receive from views and advertisements that they include in their video content.

The current conditions have expanded the use of the live chats feature, as creators have begun hosting livestreams of their concerts on various social media platforms such as Instagram, YouTube and Facebook in adherence with the social distancing mandate (Curto, 2020; Eliezer, 2020). Although 'entry' to these virtual concerts is predominantly at no cost except for a stable internet connection, more established artists have experimented with charging a small fee to their social media followers in exchange for online attendees being allowed to submit song requests to the artist (Perkins, 2020).

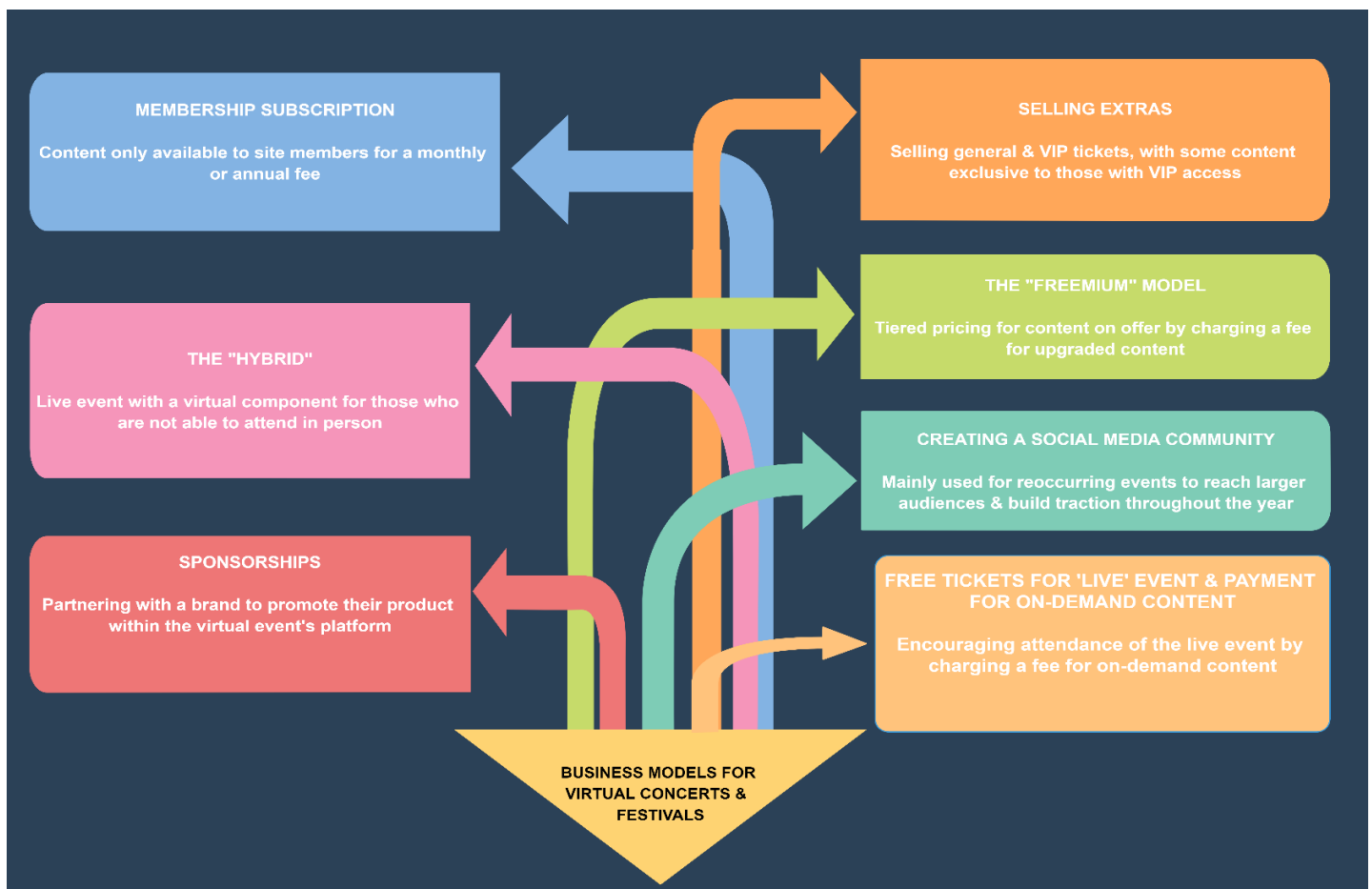


Figure 4: Possible Business Models for Online Cultural Festivals and Events

Sponsorships

The promotion of products through the inclusion of advertisements in YouTube videos overlaps with the sponsorships business model for virtual events. Getting sponsorships for a virtual event is one of the ways by which creators can earn an income from their online events through 'sponsorship revenue'. The central premise of the sponsorships business model is partnership between an online content creator and a brand or business to promote the latter's product to the creator's audience to achieve greater brand exposure, in exchange for direct payment to the content creator or funding for the event (Dholakia, 2020; Hubbard, 2020). Since hosting virtual events costs far less than pre-pandemic times when hosting an event meant hiring a venue, organising catering and other costly undertakings that go into ensuring the success of an event, potential sponsors may require a creator to come up with more innovative ways that will ensure that the sponsor will not lose out on gaining exposure for their brand due to the current restrictions (Fernandes, 2020; Layman, 2020). An example that illustrates this business model is Standard Bank's partnership with the National Arts Festival where cardholders receive up to 20 percent off their tickets for the main programme (Standard Bank, 2020).

The hybrid model

The hybrid business model approach to virtual events is another one that is often attractive to sponsors since they offer both live in-person and virtual attendance for who are not able

physically to attend the event (Heijkoop, 2014; Curran, 2020). The appeal of this business model is that it has the potential to draw in large numbers of event participants, both locally and internationally, since it removes barriers, which could restrict participation, which in the case of the current pandemic would be the travel restrictions in place (Heijkoop, 2014). Participation in a hybrid event is often promoted through live chats or social media interactions where questions might be posed by a virtual audience and answered live for the benefit of all the attendees (Heijkoop, 2014). This virtual business model is often used for international conferences, which bring together individuals working in the same field but living in different parts of the world (Heijkoop, 2014; Fernandes, 2020). In the case of concerts and festivals, the hybrid business model can be operationalised through the provision of a limited number of tickets to the live in-person portion of the event, based on the size of the venue and on the COVID-19 restrictions in place, and then providing a link for other audiences to join via different online platforms (Wired Production Group, 2020).

Free tickets for live events and payment for on-demand content

Another virtual event business model, which has some similarities to the hybrid model, is one, which offers free or discounted tickets to livestreams, and charging a fee for the on-demand video recordings of the event (Webtickets, 2007; National Arts Festival, 2020; Ferve Tickets, 2021). This seeks to encourage attendance to the 'live' events and appeals to sponsors whose continued support is dependent on the levels of attendance. This model is often used for virtual film festivals, providing 'video on-demand' content for those who cannot attend the event in person (Ferve Tickets, 2021). This business model could be useful in cases where time differences serve as a hindrance to attendance at the livestreamed event.

Creating a social media community

Many content creators use their social media platforms to build communities of supporters of their creative content. Although this virtual business model has been around pre-COVID-19, it has become more useful as one of the main tools, which combines some aspects of the other business models under one platform. Creating a social media community helps to ensure that a reoccurring event reaches a larger audience and assists in building traction throughout the year (Mello, 2020). Moreover, building a social media community ensures that the event organisers do not have to arrange for attendees to sign up each time the event is about to take place (Poswal, 2020). The other benefit of this business model is that the event organisers can sell merchandise on the site in the days leading up to the event, host livestreams and post snippets of their content to keep the interest of their social media followers (Forsey, 2020; Poswal, 2020).

The 'freemium' model

The freemium or 'try before you buy' business model makes use of a tiered ticket-pricing structure where attendees experience a limited amount of the content for free through free short clips posted by the creator on their social media platforms (Richards, 2020; Solaris, 2020). One of the benefits of this model is that the free content can be shared across various social media platforms, which further increases the content creator's reach (Richards, 2020). This model helps attendees make informed choices on what content they would like to consume since they will have already experienced the type of content on offer. With this model, if an attendee wants to experience more content, they have to pay. This model can also be applied to on-demand content, where a content creator can post a clip from the pre-recorded content as a way to capture the interest of the online audience. This model is most commonly used by stand-up comedians promoting their concerts and on-demand video content, and other entertainers in the music and film industry.

Selling extras

This model utilises the tiered ticket pricing structure, where content creators charge different prices depending on the add-ons that are included in the price of each ticket (Richards, 2020). For instance, a content creator might decide to sell a limited number of exclusive VIP tickets which come with free merchandise or goodie bags, access to a VIP lounge for a virtual 'meet and greet' with the host and access to exclusive 'behind the scenes' content that was not streamed (Richards, 2020; Accelevents, 2021). These VIP tickets could be sold in addition to early and general admission tickets, which do not offer the same perks to attendees.

6. The experiences of South African Festivals who made the online shift

This section of the report is based on the analysis of interview data from festival managers and directors, as well as an online digital audience survey, which was collected specifically for this report. The questionnaire used for the key stakeholder interviews with festival managers is available in the appendix.

6.1 The motivations for the shift to the digital environment

The first interview question was, "What motivated your decision to shift to the digital environment - what were the main aims?" Answers were in 4 main themes: Business continuity; supporting creatives (and technical crew); reaching audiences; and maintaining relationships with sponsors.

For all respondents, the pivot to digital platforms was an emergency response to the lockdown, rather than a carefully considered and designed shift. It was most difficult for festivals whose planned dates were closest to the start of the level 5 lockdown, since they had already invested

a great deal of time and funds in planning and production. Festival managers saw the shift to digital primarily as a way to “keep the doors open” as opposed to a complete shutdown. Continuity was also an important consideration: Rather than cancel entirely, online offerings “kept the festival alive” and “kept the festival on the calendar”.

Beyond business continuity, all respondents aimed to support artists and creatives in a time when there were few other job opportunities. As one manager of a festival that had to be reworked at very short notice said, “They [Creatives and crew] were grieving a living loss of this thing that was supposed to happen”. Indeed, for festivals and events that were already in production mode, the shift to the online environment was a way of getting some benefit from, exposure for, work already put into productions.

Festival and event managers also felt some responsibility to other stakeholder groups: audiences and sponsors. Maintaining the good will of audiences through “delivering on our promise to our fans” was a motivating factor for some. For those with developmental aims (working developmentally with youth or creatives), it was important to continue to deliver on their mandate in some way. One manager felt that it was important to continue to reach older audiences, who were in the high-risk category for COVID-19.

A few festivals mentioned the responsibility they felt towards their sponsors who had already invested in the 2020 festival. Continuing on the online platform thus helped to provide at least some return and exposure for sponsors. Others felt the continuation was important for retaining sponsors for the future.

6.2 Business models in the online environment

The second question in the survey asked, “Which business model did you use? Free online events; ticketed events; a mixture of the two? How did sponsors respond?”

The majority (7 out of 13 festivals and events) had offerings entirely for free (sponsorship model); two worked mainly on selling tickets, and the remaining 4 had a mixture of free and ticketed access to online content.

The types of free events were mostly fine art exhibitions, webinars, and “activities” (like prize giving, or other interaction events on platforms like Zoom). Types of paid events were mainly performing arts events, like theatre and music.

Ticketing structures included “free to subscribers” (offered sometimes through partners, like media platforms who sponsored the event and to which audiences had to subscribe in order to access festival content); tickets that covered one day of access, tickets that gave access to the whole festival, and tickets for individual shows. There were some attempts to use more

sophisticated models, such as creating a social media community of loyal followers, and larger, more established events used their social media platforms in innovative ways.

However, overall ticket sales were low. Organisers were mostly unwilling to share detailed information on their ticket sales, but it does not appear that any of the festivals or events interviewed sold more tickets than in previous years. As one respondent put it, “people don’t like paying for online stuff.”

Free events seem to have had more success in attracting audiences. For those festivals and events who could afford to offer free online access to their content, they saw the online environment as an “opportunity to grow [existing] audiences” and reach new audiences. They relied on sponsors to cover costs, and some asked audiences for donations at the end of the show. This last strategy links to the “freemium” model discussed in section 5. However, the strategy does not seem to have been very successful in the online festival and events context.

A few of the festivals that occurred later in the year experimented with hybrid events: they had smaller, outdoor in-person events for which tickets were sold, supplemented by free online content. This is the opposite of the model discussed in section 5, where free live events are supplemented by paid online content. For the event that had both live ticketed and free online events, this model seems to have worked reasonably well in terms of generating revenue.

In terms of how sponsors responded, some existing sponsors stayed on board, but organisers reported that it was very difficult to find new sponsors for online content in 2020. Some existing private sector sponsors were unable to help due to their own financial constraints as a result of the lockdown, or business closure. Some “in kind” sponsorships were lost because the physical infrastructure usually needed to run the festival or event was not needed in 2020. However, some sponsorship was retained and used to cover server, data or filming costs.

6.3 The experiences of creatives and artistic producers

The third question in the survey concerned the experiences of artistic producers: “How did creative professionals who provided the content feel about the shift? Did they experience any challenges relating to internet access, data, or skills needed to produce online content?”

While responses from creative producers were, for the most part, positive, festival organisers reported some challenges. Some “die hard” creatives found the shift to a new medium difficult, and some were “caught off guard” in terms of the adaptations required, particularly having to learn new skills quickly. As one organiser put it, it was “a bit of a shock in terms of the work involved.”

There were also artistic challenges related to the kinds of content that would work online: “Talking on the screen is very different in creative expression and emotional connection to talking to somebody in real life”.

Several organisers commented on how difficult creatives found it to have to perform without the interaction with live audiences, and the mental shift that had to be made in producing for the online environment: “[The artists] were very enthusiastic when they got going but nobody was sure of the value because you know when you walk into an event and you see the artist, you feel the artist and you hear an artist or an act that is real...”. Another manager responded, “although they [artistic producers] were grateful, artistically they were very dissatisfied”.

There were also elements of the “digital divide”: Access to equipment, internet expertise, filming costs identified as a challenge by the majority of artistic producers. Where this was not identified as a problem, sponsorship was key in overcoming financial challenges.

An important finding is that, where possible, festival organisers provided important kinds of support to creatives (beyond offering them a platform on which to earn an income). These included:

- Providing facilities for filming pre-recorded content at locations around South Africa
- Setting up studio-space for recording and production of “live” performances
- Converting the usual “per diem” allowances to data, and covering data costs
- Providing skills training and advice for the shift to online delivery.

Some festival organisers were thus able to use their knowledge, skills and experience in the industry to provide timeous and effective support to creative professionals.

Festivals that were organized from smaller towns also experienced some online infrastructure challenges in relation to bandwidth. As one manager put it, “We sucked up pretty much all of the bandwidth in the city in order to run this festival”.

Despite the challenges, a number of positive themes emerged in relation to the response of creatives to the shift online. Many festival organisers reported how thankful, and grateful for work and income-earning opportunity creatives were. Many were excited and enthusiastic to participate in a new production mode, especially in a period where few other options were available.

For some, especially those who had already started considering the shift to online formats, the digital festivals were an opportunity to experiment with, and test, the new format, speeding up a shift to the online environment that was already taking place. Some festival organisers also commented that, with the geographic constraints removed, they could include more

creatives than usual because they did not have to budget for things like travel and accommodation.

6.4 Audience experiences

Two sources of data were accessed in order to get a sense of how audiences responded to online cultural events. The first source of data was the impressions of festival organisers, based on online activity, ticket sales and informal feedback. The second source of data was a short online survey run by SACO, which invited South Africans who had participated in online events to share their experiences.

6.4.1 The opinions of festival organisers

Festival organisers were asked: “How did audiences respond to the online edition of the event? Do you think that the data costs and internet access were an issue for your potential audience?”

Perception of Audience response

Responses were mostly positive to the online events, but ranged from non-committal to enthusiastic. For example, at the lower end it was said that audiences were grateful that something was done, but it was not the same experience as seeing it live. “They said thank you very much, it’s better than nothing, but when you look at the ticket sales they did not enjoy it at all.” In general, audiences responded [because] they wanted to support artists. At the other end of the scale, it was reported that audiences responded “very warmly”, were “enthusiastic” and particularly given “the quiet pandemic world,” people were excited to participate in an interactive event and connect with communities. People reacted to special events very well if it was “extraordinary and not the usual kind of thing.”

Several respondents noted that enthusiasm waned after the first events. As expressed by one:

“I think there was a surge of support, but there is also a question, especially related late last year, when I think there was a general fatigue with online everything because during your work day you are with webinars, zoom, etc. I think the last thing that people wanted to do was again look at a computer screen”.

Access

The ability of audiences to access online events varied. Many online audiences were said not to understand how to access the work online. However, according to one festival manager, audiences adapted quite quickly, especially those who were used to the online environment:

“Most people understand *Showmax* and *Netflix* so we tried to develop our website in a similar way. I think there is still a long way to go in order to get audiences *en masse* to experience online programmes. However, those who did access it were incredibly

proud of what we were able to do and also incredibly quick in terms of understanding how this works.”

Participation

With a few notable exceptions, the attendance was not high in terms of ticket sales, although Comedy was well supported. At first the audience was very positive; they wanted a connection, but interest waned: “The first event sold very successfully - more than covered the costs of the event...The second event audience numbers halved, despite positive feedback.” For the free events participation was said to be “quite significant.” Most managers felt that audiences were not particularly interested in paying for online content.

One of the most successful festivals had over 83 000 visitors to its website and “from across the world and from almost every continent.” Whereas the festival over previous years catered specifically for a Province, 2020 drew most of its participants from three other provinces.

Audience Profile

Several festivals reported a small increase in younger participants, and a shift in the profile. One festival manager reported that, in 2020, their audience was both a younger and, unusually for them, had more men than women participating. Older participants found the shift to digital more difficult: “One of our challenges with our audience might have been that they are an older generation. That is the biggest following so getting the concept of Facebook online is not easy.” Nevertheless, it was noted that “a lot of the older generation that were used to buying tickets for the festival at kiosks got used to the technology and logging in. Their participation increased over the year as they became used to it.”

Expectation of future audiences

The consensus expectation was that if the same events were presented in a similar format, many of the people who were previously uncomfortable with the medium of online streaming were familiar with it. The sentiment was captured in the statement: “I think a year or half a year down the line audiences would have grown from our existing audiences. I think a lot of people who didn't usually watch or haven't been before to the festival would be much more aware of it because it was shared widely on various different Facebook platforms.”

Festivals cited three issues main issues in relation to technical issues that may have prevented audience participation: costs, internet access and “digital as a medium”.

Some festival organisers recognised that the extent to which online access was an issue depended on the audience. For festivals that had relatively wealthy participants, access was not a major issue, but organisers acknowledged cost as a negative factor and access as a problem in areas where there was no or poor internet coverage. South African data cost was regarded as being “very expensive, which marginalised many”. This was especially the case

for local people in the supporting communities of festival host cities and towns, who usually participated in-person.

Apart from data costs and internet access, was “digital overload” was cited as a detractor: “All everyone does is sit and look at a screen.” There was also a production quality issue: “A lot of people were using their cell phones to make their videos so production value plays into it”. As also noted by artistic producers and in direct responses from audiences, the switch to the online medium was not always effective: “digital is not a medium that live music and live [performance] easily converts to. The audience is distanced and they miss the immediacy and the urgency, the excitement and possibly the danger of a live performance.”

Despite these acknowledged difficulties, festival managers reported that audiences had responded relatively favourably overall, and some festivals reported having more participants than in previous years.

6.4.2 The online audience survey

An online survey to determine the experiences of those who participated in online cultural events was widely distributed. Sixty-five responses were received. This section reports on the findings.

In terms of who responded, about half of the responses were from men. The largest home language group was English (72.1%), although there were some respondents from a number of other language groups including Afrikaans (9%); Zulu (6%); Xhosa (5%); Tswana (3%); Venda (2%); and Ndebele (2%). In terms of age groups, nearly 45% of the respondents were younger than 35 (an even split of 22% each of age categories 18-25 and 26-35); 21% were between 36-50, and the remainder were in the older age groups. Respondents were also mostly highly educated, with 37% having a degree or diploma and a further 41% having more than one degree or diploma.

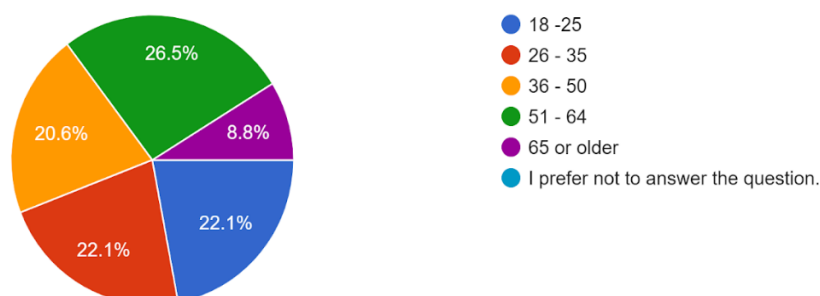


Figure 5: Age groups of respondents to the online audience survey

The respondents can thus not be said to be representative of the South African population, which perhaps also reflects the digital divide: it is mostly the higher income and education

groups who are able to access online cultural content easily. However, understanding online cultural participation is likely to become increasingly important, and this is an important area for future research. For the purposes of this report, the responses can be seen as an indication of online audience experiences, which are analysed in conjunction with input from festival organisers.

Online Event Attendance and Spending

Table 2: Number and Type of online shows attended

Number of Shows Attended	Percentage
1 - 3	58.2
4 - 7	22.4
8 or more	12
Mostly by South African artists and performers	56.9
Mostly by international artists and performers	3.1
A mixture of both South African and international events	40

The majority of respondents (58%) attended 1-3 online shows or events during the COVID-19 shutdown period to date, followed by 22% who attended 4-7 shows, with much smaller percentages attending more than 7 shows. Shows that were attended were mostly by South African artists and performers (57%), although there were 40% who were enticed by a mixture of both South African and international events.

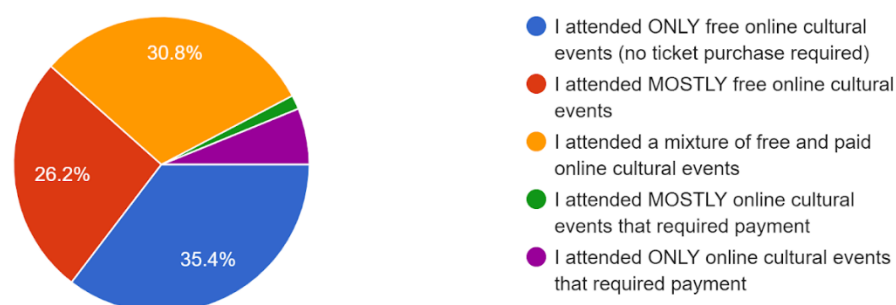


Figure 6: Participation in free and ticketed shows

Respondents were asked if they had attended free or ticketed shows. About a third (35%) of respondents only attended the free online events, which required no ticket purchases, and another quarter (26%) attended mostly free events. About a third (31%) attended a mixture of free and paid events. A minority attended mostly or only online events that required payment.

The spending data also reveals low levels of spending. A third of respondents did not pay anything as they attended and participated only in the free events, and another 23% spent between R50 and R100. This means that nearly 60% of even this high-education (and thus

probably high income) group spent less than R100 on online events between March 2020 and March 2021. This agrees with the view of festival organisers that it is very difficult to monetise online content.

Table 3: Spending on online cultural festival and event participation since lockdown

Spending Category	Percentage
Nothing (I only participated in free events)	32.3
R50 – R100	22.6
R101 – R200	11.3
R201 – R500	16.2
More than R501	16

In terms of factors that limited online participation, 41% of respondents cited problems with their device (“Small screen or poor sound quality on the device I was using”), followed by “Lack of internet access or poor internet connection” (38%); 16% found the cost of data limited their participation.

Other problems that limited or prevented access to more online shows were technological issues, such as not being able to navigate the sites easily and to find the events they were looking for, whilst others were wary of carrying out online banking transactions for security reasons. 2% reported being limited by the ticket prices, and some did not find suitable or relevant content that they enjoyed.

Asked what they had enjoyed about participating in online events, 54% of respondents enjoyed “Being able to participate from my home without having to travel or go out”, and a further 25% enjoyed “Being able to move quickly and easily between different shows and events”. An interesting 44% of respondents revelled in their ability to keep in touch with artists and performers, and 54% appreciated access to shows they would otherwise not have been able to enjoy. Some of the other factors that the attendees enjoyed about online festivals and events included being able to watch the show afterwards (as compared to watching a live event), saving on travel costs, and the “interactive” nature of some online shows.

When asked about what they had not enjoyed about online attendance, the vast majority of respondents said that they missed the excitement and “vibe” of attending a live event (79%), the sense of connection to performers and artists (66%) and being able to socialise with friends and other attendees (62%).

Table 4: What attendees enjoyed and did not enjoy about online cultural festivals and events

What did you enjoy about online events?	%	What did you not enjoy about online events?	%
Being able to participate from my home without having to travel or go out	54	The excitement and “vibe” of going to a live event was missing	78.5
Being able to move quickly and easily between different shows and events	25.4	I struggled to use the technology needed to access the online events	4.6
Not having to dress up and go out to see shows and events	12.7	Not being able to travel to a venue and experience a new place	40
Keeping in touch with artists and performers	44.4	Not being able to socialise with friends and other people attending the event	61.5
Having to pay less for tickets	15.9	I missed the sense of connection to the performers and artists that you get at a “live” event	66.2
Interacting with other people online through things like “comments” and “chats”	12.7	Not being able to experience the food and drinks on offer at live events	26.2
Having access to shows and events that I would not normally be able to attend	54	Other: quality of sound and visuals	10.8

Final questions asked about overall experience ratings, and intentions to attend in the future. The first question was: On a scale from 1 to 10, where 1 means "very poor" and 10 means "excellent", how would you rate your overall experiences in participating in or attending, online cultural events during the COVID-19 lockdown?

Only a minority of respondents (17%) rated their online experience as good or very good (8, 9 or 10 out of 10). The most commonly chosen rating was 7 out of 10 (26%), 5 (18%) or 6 (14%). A quarter of respondents rated their experience as 4 (11%) or as poor (14%).

Nevertheless, when asked if they would be participating in online cultural festival and events in the future, 68% of respondents answered “yes”, with a further 26% responding “maybe”. Only a very small group (6%) said “no”.

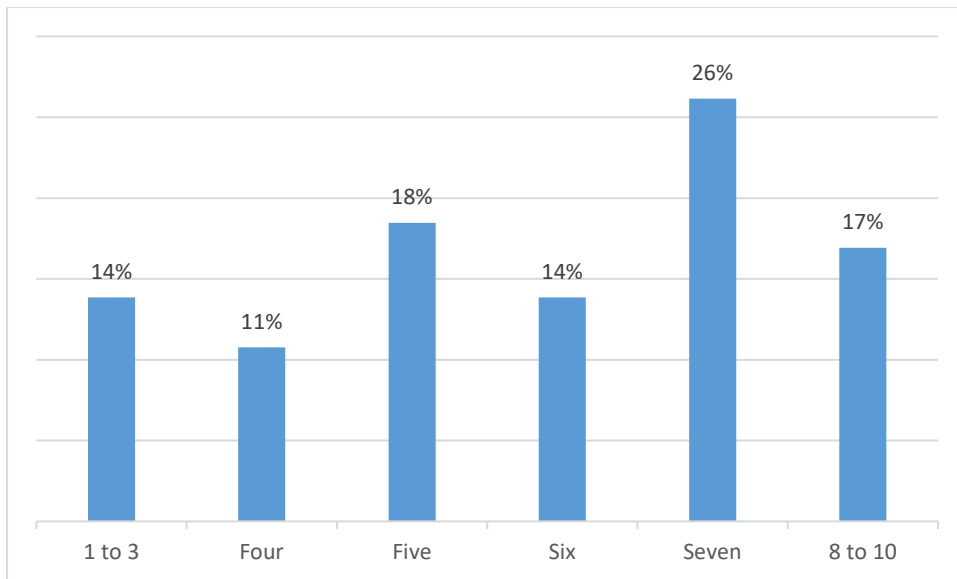


Figure 7: Rating of online cultural events by audience respondents

6.5 Planning for the future: Sustainability and lessons learned

The last questions of the festival organiser survey involved reflecting on lessons learned and the future sustainability of the online shift. “Going forward, is the shift to online something you would keep using in the future? Why or why not? Is it financially sustainable?”

As to whether a Festival was planned for 2021, the majority answer was an emphatic yes. For some it was a case of: if there was a choice, then ‘never again’; and if it is a necessity, because of the pandemic then, it would be continued online. More positive responses, included: “Definitely, it is something that we want to do” and “Absolutely, absolutely; there is no going back.”

All Festival organisers reported that 2021 events would be hybrid in form, incorporating online and face-to-face events. For some it was a matter of reluctance: “We would rather not have to, but I don't think we have a choice.” As expressed by one respondent:

“Even now with the uncertainties of 2021... Festival 2021 will be a hybrid. It will have online elements...live elements, [and] a world in which one will be able to interact online with the live elements and vice-versa, because we cannot imagine the feasibility of actually running a live festival like ours when our venues are restricted to an audience of 50. We are really wrapping our heads around this and we found some very interesting small, but important [income] streams, so we run seminars, webinars, colloquiums and small conferences because we now have the skills.”

The problems involved in hosting a Festival in 2020 were a common theme. “It was unbelievably difficult to get over everything last year and actually deliver the...Festival, but having done that, having learnt how, there is no going back now.” What is faced for forthcoming

Festivals are the many uncertainties: “We have to plan for a live festival and equally we have to plan for an online one. It could work entirely on an online platform or it would work as a hybrid event or you can scale it up and have audience so I think that [the] uncertain landscape of “yes we have to do it online, but it is not ideal, especially in the creative industry because creative arts are all about emotions and trying to communicate emotions on a screen is very difficult.”

Physical productions would be small – less than 50 in accordance with Covid regulations. The digital format is planned to range from pre-recorded productions to live streaming of events.

A few larger festival organisers had been able, through the help of sponsors, to build advanced online platforms. They have significantly invested in their platforms, through which they could sell tickets, and host hybrid festivals in 2021, including an in-person and online programme. The financial viability of online offerings was a concern. As stated by a respondent: “If you look at the live events and theatres or festivals, we are dependent on ticket sales and that's a large part of our income. Online at the moment is not financially sustainable...the demand is not that big and you generate much less [revenue].”

Financially, 2020 was “really not satisfactory in terms of what it really cost to produce the theatre pieces or whatever.” It is expensive and the result is not worth the money that is put into it. It requires a substantial budget that is not feasible. If a comparison is made to the global market, they have large budgets and in our current situation, we do not have the means to produce the same quality of content.

“No online events of any nature are financially sustainable without extraordinary sponsors.” It is expensive - labour, skilled technicians and subscriptions, recording, cutting and editing - and the result is that it does not produce a lot of revenue given what is put into it. The cost of live streaming is extremely high for events that took place over a period of several days. “It requires a substantial budget that is not feasible. However, where there was sponsorship for theatre production and pre-production it was possible to do everything required beforehand and not rely on ticket sales to cover costs, which would otherwise have resulted “in a total loss.”

A concern of online offerings is the opinion that “nothing can really replace live events.” It is “not ideal, especially in the creative industry, because creative arts are all about emotions and trying to communicate emotions on a screen is very difficult.” Furthermore, it was held that: “Streamed events are not financially sustainable” citing online fatigue, other offerings, and the inability to create “the same vibe.”

Advantages claimed for online digital productions are the possibility of a “greater reach” and building the journey or experience towards the actual event, and for some applications, such as comedy, it would still be possible “to provide a feel for the bustle and excitement of a live event.” In particular, it was reported that “fans located around South Africa with no means of travel could be reached”. For Gauteng-based fans, “the response was positive and many fans indicated they would be interested in hybrid events after experiencing the success of the online show.” A number of festivals mentioned that they had attracted international audiences in the 2020 edition, and see this as a potential area of growth in the future.

Lessons Learned

The final question of the survey was, “If you had to give some advice to other cultural events/festivals thinking of moving online, what are the top 3 things you think would be helpful for them to know going into it?” Responses are arranged into the major themes identified across festivals.

Plan well in advance

Timely planning was frequently implied, much of which is contained in the following advice:

“Don't do it in 100 days. It is a nightmare. Just because it is online does not mean less effort. It is different and it takes a great deal of thought about what is going to work online. It is necessary to produce work that is designed for online audiences. Nobody will sit online the whole day to watch a festival so it must package works that have to be designed in shorter bits. And, time is needed to test the website.”

Organisers are warned that there is a high expectation that everything will work perfectly immediately, but that was not going to happen. On the positive side, it was noted that: ‘What is wonderful about a digital environment is that it can be changed really quickly and it enables the easy elimination of what does not work well.’

Furthermore, it was emphasised that undertaking marketing and production was just as difficult for online as for face-to-face festivals. ‘Just because it is free does not mean that any less marketing is required.’

It is not about making money

A respondent warned: “This is for anybody who thinks a fortune will be made online. No.” The earnings were about a third of the revenue that was normally earned on live festivals. Making much money through ticket sales is not likely. There is so much content online free of charge with which to compete.

Online is a different business; it is about finding sponsors who would subsidise the online presence to help pay artists' fees and to get the work event ready. For this to happen a

financially sustainable must be created that feeds into economic development and education and is attractive to potential sponsors.

Going online.

When considering going online the purpose needs to be examined. What is it that is being done? Who is it for? And what gap is being filled for artists, audience and community? The event should 'stand out' making it important to think creatively and to come up with concepts that will be interesting and engaging to an audience.

Instructions on websites or whatever is used to get people to buy tickets or to watch have to be 'unbelievably clear and simple as people often do not read and some do not understand.' It may be advisable to find something easy to use, for example Zoom, depending on budget and technology available. A respondent warned that: 'Connection is more important than perfection' as things may go wrong whilst streaming.

It is advised that dividing the event audience should be avoided. To this end it is suggested that content is embedded in a central hub so that the audience can access content in the broader context of the event, such as interactive chats, virtual meeting rooms, merchandise stores, and easily accessible guest bios and programmes.

"When it comes to virtual events there is a belief that if content is released online, then it can be watched later as easily as now. The result? Limited attendance and interaction at the live event. Ideally the content should be made available over the show dates and then pushed to public platforms at a later date."

Two festival organisers noted the attendance of international participants at the 2020 events, and suggested that "It is a brilliant international networking opportunity by putting work online in international festivals" but not to be concerned if it did not work immediately.

Programming

It is necessary to be realistic about what is being offered, with available resources being key in determining what to include. One respondent suggested that: "Less is more." If there is to be a build up to an event, doing too much is inadvisable. Some ideas could be implemented in the future. A respondent opined: "Deliver a clear short message that's 'punchy, short and relevant, even unexpected.'"

It was advised to decide when events would be staged and reason for the decision, for example, scheduling events around payday when people have money. Secondly, if possible, dates should be set that do not clash with other events that may be happening. Things to consider are: What is the period that the event is made accessible? Is it delivered as live acts or on-demand? In other words, is it just available to anyone, anytime for a whole year or it available for a shorter period, say, a week and how are people made aware of it?

Understanding the target audience and using different communication channels to reach people is vital. People's habits are very different online. Event organizers may tend to organize events around what is already known about people, and what is known comes from how they behave at live events. In reality, people have completely different behaviours online. The trick is to identify those differing habits. In advance, use polls and surveys to gather as much data as possible before launching a virtual event. As a consequence, content that would usually be applauded at a live event may not get the attention it deserves if the same formula is followed online. Use pre-show research data to tailor content to audience's preferences was also recommended.

The importance of social media.

Since the decline of print and to some degree electronic media, social media was now 'king.' It was necessary to not only produce content, but also social media content that could be used for marketing or advertising and for delivery of festival content. Some popular work was WhatsApp theatre.

A respondent advised: 'Remember, that you are up against a lot of competition in social media...and publicity campaigns have to be up to par to ensure people are aware of the event.' A very strong social media marketing awareness was needed, which required good promotion on a social media platform.

Marketing

Respondents advised that what is being done is marketed online. 'It seems people think that just doing social media posts is enough, but it is not. It is the same as any festival or any production that you do, any city any town.' A marketing strategy online must give people information without harassing them. "The trick is to start posting content each week leading up to a big event. The audience may be unfamiliar with virtual events and how they run – get them ready to participate with exciting tasters of what is to come and show them how they can interact and shape the flow of the event."

A novel proposal was that subscriptions be employed. Subscriptions enable notifications when virtual events begin, which is why it is important to encourage them. When numbers of events are running for different, but overlapping audiences, this gives an additional chance to notify a wider audience of what is going live and to encourage impulse participation.

Keep the production costs within limits

While costs must be contained, it is advised that nevertheless it is important to have high quality productions. On the technical side the availability of bandwidth and accessibility to interact is needed not just for the event, but for people who visit the site.

Ticketing

Ticketing should be made as smooth and effortless as possible. Current commercial ticketing options may not work well while some others were found to be slightly easier to access tickets.

Tickets should not be made too expensive and if sponsors can be found it is suggested that access could be made free of charge. While it was generally felt that providing free access would be ideal, it was acknowledged that festivals are under severe strain at the present have to survive, so it may not be feasible. It is also believed that people attach more value to an event that is ticket and paid for.

In seeking sponsors, what must be looked at is how to offer value to partners/sponsors and how benefits can be provided.

7. The implications of the findings

The analysis of data from various sources highlights both the potential advantages and the challenges of pivoting to the online environment for cultural events and festivals. Advantages include the possibility of reaching a wider audience base, being able to include more, and a wider range of artistic producers, and experimenting with new art forms and business models as the 4th Industrial Revolution speeds up. Disadvantages relate to the large fixed costs of shifting to the online environment, the skills and expertise needed, and the difficulty of monetizing content in an extremely competitive environment.

In all cases, the pivot to the digital environment in 2020 was done as an emergency response to the COVID-19 lockdown, rather than as a measured and carefully planned and designed move. Festivals that had already started to invest in, and experiment with, the online environment were able to adapt faster and more successfully than those who had not started to think in this direction.

Broadly speaking, the research identified two categories of cultural events, which have been affected differently by the shift to digital:

- (i) Larger, more established events with a more professional focus and established relationships with sponsors and audiences; and
- (ii) Smaller, community-based events, with more amateur participation, often with a development focus, who attract mostly local audiences and sponsorship from smaller businesses.

Events in category 1, which were bigger, better-established festival “brands”, seem to have had more success both in attracting audiences (including selling tickets) and retaining sponsors with whom they had established relationships. They also had more resources and

expertise for the shift online, and some already had good websites and were offering some online content.

For these larger, older establishments there is a strong sense that there has been a “sea change”: that is, the lockdown speeded up a shift that was already happening, and provided an opportunity to innovate and experiment. They are investing heavily in adapting to the new platforms and business models, and will build on their digital advantage in the future. For them, there is no going back to “normal” pre-lockdown operation, but rather a permanent shift to new business models, and of new ways of engaging with artistic producers, sponsors and audiences.

An extremely important finding is that, across the spectrum, but especially for those festivals and events with some expertise and resources, the role that these cultural events have played in supporting artistic producers during the lockdown was extremely important. They provided not only the opportunity to earn an income, and maintain continuity, but technical expertise and skills development and access to equipment and technology (workshops, studio space, filming equipment etc.). Many festival organisers worked hard to help to off-set the digital divide by providing resources and support to artistic producers who would otherwise not have been able to participate. Indeed, one could argue that the role of festival and event organisers has changed significantly from being gatekeepers and curators to becoming collaborators and enablers.

Ongoing and expanded public support is needed for category 1 events to enable their continued shift to the online environment, with a focus on supporting creatives, reaching audiences, and allowing experimentation that will enable them to develop world-class online offerings.

Events in category 2, are the smaller, local and community festivals with a development focus. They were hardest hit because they were not working primarily with professional artist and consumers, so they did not really have a product to monetise. Their priority was often the connection to participants and communities “beyond an art event”, which made it very difficult for them to deliver on their mandate in the online environment. In general, they had very reduced offerings (some did workshops and discussion events rather than performances) and relied on volunteers and artists who were not paid to keep the event alive. The shift to online platforms was prohibitively expensive for small festivals without existing in-house expertise and with smaller budgets and management teams. This was also where the “digital divide” was most evident: Artists and audiences with access to good equipment and data could still participate, while those without access were largely excluded.

Smaller, community based events thus faced major challenges: Unable to shift online effectively, they lost sponsorship and audiences, and were not able to provide much support to artistic producers. Many are not financially sustainable, and may close down if the lockdown continues for 2021 and beyond. This would be a great loss to the South African cultural landscape: they provide valuable platforms for the development of new creative talents, reach local audiences who may not otherwise have access to cultural activities, and play important social development roles.

The implications of the finding is that events in category 2 also need funding to sustain them during the lockdown, but also expertise and equipment to enable at least a basic online presence and small, hybrid events that can reach local audiences.

Regardless of the category, none of the festivals or events that were part of the study made a profit, and many were not even able to cover the costs of their reduced online offerings. This finding is supported by the online audience survey, which found that a third of respondents reported attending only free online events during the lockdown, with a further 25% spending R100 or less on online participation over the last year.

In such an environment, sponsorship and marketing are absolutely essential for the sustainability of future events. However, it is extremely uncertain that the amount of sponsorship (especially from smaller, private sector businesses) will be maintained in 2021 and beyond. The general economic downturn has already led to some festivals losing sponsorship from local businesses who are themselves in trouble financially, or (as mentioned by one respondent), have shut down.

The highly competitive online environment, where there is a great deal on offer, also makes ongoing marketing essential for survival. The most successful events seem to have been those that already had ways of reaching out to past audiences in order to maintain the festival's presence and brand continuity. The adoption of more sophisticated business models is likely to assist with monetisation in the future, and those events that opted for a hybrid model (that included some in-person events) seem to have been more successful in generating revenue.

A potentially powerful intervention could be the greater coverage of cultural festivals and events on the public broadcaster, the SABC. This could take the form of subsidized advertising of the event itself, as well as showcasing the content, which will already be in a digital format. Not only will this assist the events and festivals to attract audiences and sponsorship, but it will also help the SABC to fulfil its public broadcaster mandate.

8. Conclusions and Recommendations

The main aim of the research was to investigate the impact and effectiveness of the pivot to online operation of South African cultural festivals and events for organisers, artistic producers and audiences. The research methods included key stakeholder interviews with 13 South African festivals that had shifted their productions online as a result of the COVID-19 lockdown in 2020, as well as an online audience survey of people who had participated in such online cultural festivals or events.

For the majority of festivals, the shift to online production was a survivalist strategy done in order to maintain festival continuity, to support creatives, and to continue to deliver on their mandate to audiences and sponsors. Festivals that had already started to think about the online environment, and had some in-house expertise, found the shift to be more manageable and successful.

There are a wide variety of business models that can be used in the online environment, including freemium, subscription, sponsored, and ticket sales models. The majority of festivals in the sample used either free access or a mixture of ticket sales options and free access. None of them were able to monetise their content very effectively. However, those who already had ongoing relationships with their audiences via social media and other platforms, and who could leverage existing sponsorship relationships were more successful. Given the increased level of competition in the online space, ongoing marketing and establishing long-term relationships with stakeholders is key.

Artistic producers were very grateful for the opportunity to display their work and earn an income in a time when little else was available. Some saw the shift as an exciting opportunity to try out the new medium and reach new audiences. Others were less enthusiastic about the limitations of the online environment, and struggled to access the skills, technology and bandwidth needed to produce effectively online.

An important finding is the extent to which those festivals with resources were able to support artistic producers by, for example, providing facilities for filming and studio-space for “live” performances, and providing skills training and advice for the shift to online delivery.

Audiences were relatively enthusiastic about being able to access cultural content online, and the majority of them said they would continue to do so in the future. They consumed a mix of South African and international content. However, they clearly missed the “vibe” and

excitement associated with live events, and more than half of them spent only R100 or less on online cultural participation since the lockdown began in March 2020. Limiting factors were the poor quality of sound and visuals when accessing content on devices like mobile phones and laptops, as well as the cost of data and slow internet speeds.

Reflecting back on their experiences, festival organisers of those events that pivoted to the online environment were able to provide a number of “lessons learned”. These covered the planning process, marketing, finance and ticketing options.

Based on the research findings, policy recommendations include:

- Developing differentiated support models depending on the kind of event (category 1 or category 2), which will enable an increase in the competitiveness and technological advancement of category 1 events, while sustaining category 2 events until they can resume in-person (or hybrid) events post-lockdown.
- Festivals have proved to be very effective ways of supporting creative producers and artists during the lockdown, both in terms of providing them with a means to earn income, as well as assisting with upskilling and access to equipment and technology. Channelling support to artistic producers through festivals, who have the expertise and experience to provide the right kind of assistance, is thus highly recommended.
- A key determinant of future festival sustainability is sponsorship. However, private businesses are themselves financially constrained, and online events do not provide as many opportunities for sponsor promotion and advertising as the in-person environment. It is recommended that the public broadcaster (SABC) be leveraged in order to provide more coverage and advertising of online festivals and cultural events which will help them to both attract more audiences, and to retain private sector sponsors.

REFERENCES

- ACCELEVENTS 2021. *How to Choose a Ticketing Strategy for Your Virtual Event*. [Online]. Available: <https://www.accelevents.com/ticketing-strategies-for-virtual-events/>. [Accessed 16 February 2021].
- ARNDT, C., DAVIES, R., GABRIEL, S., HARRIS, L. MAKRELOV, K, MODISE, B., ROBINSON, S., SIMBANEGAVI, W., VAN SEVENTER, D., and ANDRESON, L. 2020. *Impact of Covid-19 on the South African Economy: An initial analysis*. Southern Africa - Towards Inclusive Economic Development (SA-TIED).
- ATLANTIC STUDIOS 2021. *Suidoosterfees drive-in theatre takes place at Atlantic Studios*. [Online]. Available: <https://www.atlanticstudios.co.za/suidoosterfees-drive-in-theatre-takes-place-at-atlantic-studios/>. [Accessed 4 February 2021].
- BANKS, M. 2020. The work of culture and COVID-19. *European Journal of Cultural Studies*. DOI: 10.1177/1367549420924687. pp 1- 7.
- BROWNE, R. 2018. *YouTube Introduces Paid Subscriptions and Merchandise Selling in Bid to Help Creators Monetize the Platform*. [Online]. Available: <https://www.cnn.com/2018/06/22/youtube-introduces-paid-channel-subscriptions-and-merchandise-selling.html>. [Accessed 15 February 2021].
- BUSINESS DAY 2020. *Vodacom lowers data prices by up to 40% in line with competition authority agreement*. [Online]. Available: <https://www.businesslive.co.za/bd/companies/telecoms-and-technology/2020-04-01-vodacom-lowers-data-prices-by-up-to-40-in-line-with-competition-authority-agreement/> [Accessed 19 Feb 2021]
- COMUNIAN, R. and ENGLAND, L. 2020. Creative and cultural work without filters: COVID-19 and exposed precarity in the creative economy. *Cultural Trends*. DOI: <https://doi.org/10.1080/09548963.2020.1770577> pp 112-128. [Accessed 8 Feb 2021]
- CREATIVE CAPITAL 2021. *Online Arts Events during the COVID-19 Outbreak*. [Online]. Available: <https://creative-capital.org/2020/03/18/online-arts-events-during-the-covid-19-outbreak/> [Accessed 21 Feb 2021]
- CURRAN, W. 2020. *Creating Amazing Exhibitor Experiences for Virtual and Hybrid Events*. [Online]. Available: <https://helloendless.com/exhibitor-experiences-for-virtual-and-hybrid-events/>. [Accessed 16 February 2021].
- CURTO, J. 2020. *Watch These Livestreamed Concerts During Your Social Distancing*. [Online]. <https://www.vulture.com/2020/05/all-musicians-streaming-live-concerts.html>. [Accessed 15 February 2021].
- DAVIES, K. 2020. Festivals post Covid-19. *Leisure Sciences*, DOI: 10.1080/01490400.2020.1774000 [Accessed 5 Feb 2021]
- DELAVEGA-SUAREZ, P., SUAREZ-FERNANDEZ, S., BOTO-GARCIA, D. and PRIETO-RODRIGUEZ, J. 2018. *Playing a Play: Online and Live Performing Arts Consumption and the Role of Supply Constraints*. Paper presented at the Association of Cultural Economics International Conference, Melbourne Australia.

- DHOLAKIA, A. 2020. *Virtual Event Sponsorship: How to Price & Structure Sponsorship Deals for Online Events?* [Online]. Available: <https://blog.hubilo.com/how-to-structure-a-virtual-event-sponsorship/>. [Accessed 15 February 2021].
- EKELUND, R. and RITENOUR, S. 1999. An exploration of the Beckerian theory of time costs: Symphony concert demand. *The American Journal of Economics and Sociology*, 58, 887–899.
- ELIEZER, C. 2020. *Will Livestreaming Become the New Business Model for Venues in the post-Coronavirus landscape?* [Online]. Available: <https://theindustryobserver.thebrag.com/will-livestreaming-become-the-new-business-model-for-venues/>. [Accessed 28 January 2021].
- FACEBOOK 2020. In: *All Hip-hop*. Facebook Announces Artists & Businesses Will Be Able To Charge For Live Streams. [Online]. Available: <https://allhiphop.com/news/facebook-announces-artists-businesses-will-be-able-to-charge-for-live-streams/> [Accessed 15 February 2021].
- FERNANDES, M. 2020a. *5 Hybrid Event Examples to Inspire Your Process*. [Online]. Available: <https://helloendless.com/hybrid-event-examples/>. [Accessed 15 February 2021].
- FERNANDES, M. 2020b. *A Guide to Virtual Event Sponsorships Part I: Deals & Packages*. [Online]. Available: <https://helloendless.com/virtual-event-sponsorships/>. [Accessed 15 February 2021].
- FERVE TICKETS 2021. *Virtual Event Streaming*. [Online]. Available: <https://ferve.tickets/event-ticketing-features/virtual-event-streaming/>. [Accessed 16 February 2021].
- FORSEY, C. 2020. *How to Build Community-Centric Virtual Events, According to Moz's CMO*. [Online]. Available: <https://blog.hubspot.com/marketing/virtual-event-tips-moz>. [Accessed 16 February 2021].
- HADISI, S. and SNOWBALL, J. 2020 Employment in the Cultural and Creative Industries in South Africa. *African Review of Economics and Finance* (Special Edition: The Creative Economy). 12, 2: 86-109. ISSN 2042-1478
- HEIJKOOP, G. 2014. *What is a Hybrid Event and How Do You Organise One?* [Online]. Available: https://www.eventplanner.net/news/6486_what-is-a-hybrid-event-and-how-do-you-organize-one.html. [Accessed 15 February 2021].
- HUBBARD, D. 2020. *Event Sponsorship: The 2021 Guide*. [Online]. Available: <https://blog.bizzabo.com/event-sponsorship>. [Accessed 15 February 2021].
- JESS-COOKE, C.J. 2020. Democratising literature post-Covid-19. *The Bookseller* 31/03/2020. [Online]. Available: <http://eprints.gla.ac.uk/213436/1/213436.pdf>. [Accessed 2 Feb 2021].
- JOFFE, A. 2020. Covid-19 and the African cultural economy: an opportunity to reimagine and reinvigorate? *Cultural Trends*, DOI: 10.1080/09548963.2020.1857211 [Accessed 5 Feb 2021]
- KEEGAN, R. 2020. Fall fests: "we need each other now". *The Hollywood Reporter*. Issue 14. 2 Sept.
- LAYMAN, M. 2020. *Virtual Event Sponsorship*. [Online]. Available: <https://www.cvent.com/en/blog/events/virtual-event-sponsorship>. [Accessed 15 February 2021].

- LEE, D., BAKER, W. and HAYWOOD, N. 2020. Coronavirus, the cultural catalyst. Online. [Available]: https://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=&cad=rja&uact=8&ved=2ahUKEwiZ7bSiu8fpAhVRxUIHUI5AGwQFjAAegQIARAB&url=https%3A%2F%2Fwww.researchgate.net%2Fpublication%2F340248507_Coronavirus_the_cultural_catalyst&usg=AOvVaw3S3nAzCWmfLUzCJyGMck1V. [Accessed 3 Feb 2021]
- MAIR, S. 2020. What will the world look like after coronavirus? Four possible futures. The Conversation. [Online]. Available: https://theconversation.com/what-will-the-world-be-like-after-coronavirus-four-possible-futures-134085?utm_medium=email&utm_campaign=Latest. [Accessed 31 January 2021].
- MELLO, B. 2020. *3 Ways to Build Your Community with Virtual Events*. [Online]. Available: <https://marketing.sfgate.com/blog/ways-to-build-your-community-with-virtual-events>. [Accessed 16 February 2021].
- NATIONAL ARTS FESTIVAL, 2020. *Present Work on Fringe*. [Online]. Available: <https://nationalartsfestival.co.za/participate-in-vfringe-2020/>. [Accessed 16 February 2021].
- NATIONAL ARTS FESTIVAL 2021. *About the National Arts Festival*. [Online]. Available: <https://www.nationalartsfestival.co.za/>. [Accessed 19 Feb 2021]
- NOBRE, G. 2020. *Creative Economy and Covid-19: technology, automation, and the new economy*. [Online]. Available: https://www.researchgate.net/profile/Guilherme_Nobre/publication/341189890_Covid-19_and_the_Creative_Economy_surveys_aids_tools_and_a_bit_of_hope/links/5eb5cf0f299bf1287f77d6dd/Covid-19-and-the-Creative-Economy-surveys-aids-tools-and-a-bit-of-hope.pdf. [Accessed 5 Feb 2021]
- NZEZA BUNKETI BUSE, R. 2020. *A Comparative Analysis of Economic Impact Studies*. [Online]. Available: <https://www.artsmanagement.net/Articles/COVID-19-and-culture-in-Africa-A-comparative-analysis-of-economic-impact-studies,4184> [Accessed 15 February 2021].
- OTTAWA NEWS 2021. *CityFolk music festival moves online due to COVID-19 pandemic*. [Online]. Available: <https://ottawa.ctvnews.ca/cityfolk-music-festival-moves-online-due-to-covid-19-pandemic-1.5043711>. [Accessed 13 Feb 2021]
- PEREZ, S. 2018. *YouTube Introduced Channel Memberships, Merchandise and Premieres*. [Online]. Available: <https://techcrunch.com/2018/06/21/youtube-introduces-channel-memberships-merchandise-and-premieres/>. [Accessed 15 February 2021].
- PERKINS, N. 2020. *Erykah Badu to Host Virtual Interactive Quarantine Concert for a Small Fee*. [Online]. <https://afrotech.com/erykah-badu-to-host-virtual-interactive-quarantine-concert-for-a-small-fee>. [Accessed 15 February 2021].
- POSWAL, G. 2020. *Social Media Marketing Tips to Make Your Virtual Event Viral*. [Online]. Available: <https://www.airmeet.com/hub/social-media-marketing-virtual-events/>. [Accessed 16 February 2021].

- RAINER, K. 2020. *After the Interval: Audience views on returning to live cultural events, booking tickets now and in the future, and missing out on events during lockdown*. Produced by Indigo-Ltd. Online. [Available] <https://www.indigo-ltd.com/after-the-interval-survey-results> [Accessed 13 Feb 2021]
- RICHARDS, P. 2020. *Virtual Ticket Pricing Strategy*. [Online]. Available: <https://streamgeeks.us/virtual-ticket-pricing-strategy/>. [Accessed 16 February 2021].
- SACO 2020. *Measuring the Impact of the Covid-19 Crisis on the Cultural and Creative Industries in South Africa: An early assessment*. [Online]. Available: <https://www.southafricanculturalobservatory.org.za/>. [Accessed 1 Feb 2021]
- SNOWBALL, J.D. (2008). *Measuring the Value of Culture: Methods and examples in Cultural Economics*. Berlin: Springer.
- SNOWBALL, J. and ANTROBUS, G. 2019. *The Social, Cultural and Economic Impact of the 2019 National Arts Festival*. Commissioned by the National Arts Festival. Grahamstown.
- SOLARIS, J. 2020. *Virtual Events Need a Better Business Model*. [Online]. Available: <https://www.eventmanagerblog.com/virtual-events-business-model>. [Accessed 28 January 2021].
- SOUTH AFRICAN INSTITUTE OF INTERNATIONAL AFFAIRS (SAIIA) 2020. <https://saiia.org.za/research/covid-19-implications-for-the-digital-divide-in-africa/> [Accessed Feb 2021]
- STANDARD BANK, 2020. *National Arts Festival*. [Online]. Available: <https://sponsorships.standardbank.com/sbgs/sponsorship/arts-and-culture/Naf/naf-jazz-festival-makhanda/National-Arts-Festival>. [Accessed 15 February 2021].
- STATISTICS SOUTH AFRICA 2020. *SA loses more than 600K formal sector jobs during COVID-19 lockdown*. [Online]. Available: <http://www.statssa.gov.za/?p=13690> [Accessed 19 February 2021].
- WEBTICKETS, 2007. *Webtickets, Livestream & Video on Demand*. [Online]. Available: <https://www.webtickets.co.za/v2/streaming.aspx>. [Accessed 16 February 2021].
- WIRED PRODUCTION GROUP, 2020. *When Live and Virtual Concerts Come Together: Introducing Hybrid Concerts*. [Online]. Available: <https://wiredproductiongroup.com/2020/05/05/hybrid-concerts/>. [Accessed 15 February 2021].
- YOUTUBE CREATOR ACADEMY. 2021. *Earn Money with Channel Memberships*. [Online]. Available: <https://creatoracademy.youtube.com/page/course/channel-memberships>. [Accessed 15 February 2021]. [Accessed 19 February 2021].

Appendix: Survey instrument used for key stakeholder interview with festival organisers

Introduction

Hello! How are you...? My name is ... and I am contacting you on behalf of researchers at the South African Cultural Observatory. We are doing some research on the experiences of cultural festivals and events that adapted to the COVID lockdown by shifting online. Would you be willing to talk to be for 10 or 15 minutes about your experiences?

Yes: Thank you! Let me tell you a bit more about our research...

No: Perhaps at a later date?

The SA Cultural Observatory is a research organisation based at Nelson Mandela University, and funded by the National Department of Sport, Arts and Culture. All our research is publically available on the SACO website, and is also provided to Department of Sport, Arts and Culture to help guide policy related to the creative economy.

This research is about the experiences of cultural festivals and events, like the one you manage, in shifting to the online environment as a way of adapting to the COVID-19 lockdown. We would like to ask you about what motivated and enabled the shift, what your business model was (free events, tickets, sponsors) and what some the main challenges and opportunities that you faced were. OK?

Your name won't be used in reporting the results, but we would like to use the name of your festival or event in order to capture the variety of events that did go online, and to make the findings more useful to other events thinking of making the shift to digital – is this OK?

Yes: [record agreement]

No: OK, would it be OK if we chatted to you anyway, but we wouldn't use the name of your event?

Great! We appreciate your time! You don't have to answer any of the questions that you don't want to answer, and you can stop at any time.

Just for our own records, would it be OK if I recorded this interview, so that I can go back and check what you said if I need to? No one else would use the recording and it would be deleted once the research is finished.

Yes: [record agreement]

No: OK, can we continue, without recording?

Given all this information, are you happy to continue with this research interview?

1. What motivated your decision to shift to the digital environment - what were the main aims?

(INTERVIEWER NOTES: If the respondent asks for clarification or hesitates - for example, the use of existing organisational expertise; the desire for some kind of continuity to maintain event branding; buy-in from sponsors; financial incentives etc.)

2. Which business model did you use? Free online events; ticketed events; a mixture of the two? How did sponsors respond?

(INTERVIEWER NOTES: If the respondent asks for clarification or hesitates - for example was there a reduction in sponsorship; same sponsors as in previous years? new sponsors?)

3.1 How did creative professionals who provided the content feel about the shift?

(INTERVIEWER NOTES: If the respondent asks for clarification or hesitates - for example was the event an important way of way of earning money; keeping in touch with audiences; any impact on creative content or the type of work presented?).

3.2 (If not already answered in 3.1) Did they experience any challenges relating to internet access, data, or skills needed to produce online content?

4.1 How did audiences respond to the online edition of the event?

(INTERVIEWER NOTES: If the respondent asks for clarification or hesitates – Answers could include information on tickets sold/attendance; informal feedback received; any changes in the age/gender/cultural groups that organisers may be aware of)

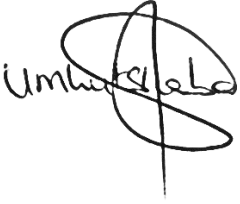
4.2 (If not already mentioned in 4.1): Do you think that the data costs and internet access were an issue for your potential audience?

5. Going forward: Is the shift to online something you would keep using in the future? Why or why not? Is it financially sustainable?

6. If you had to give some advice to other cultural events/festivals thinking of moving online, what are the top 3 things you think would be helpful for them to know going into it?

Thank you! That is the end of the interview. We really appreciate your time. If you would like a copy of the report emailed to you, which address should I use?

APPROVALS FOR THE SOUTH AFRICAN CULTURAL OBSERVATORY - The Challenges of Pivoting to Digital: The COVID-19 shut down and cultural festivals and events – 31 March 2021

	NAME	TITLE	SIGNATURE	DATE
Prepared and recommended by:	<i>Ms. Unathi Lutshaba</i>	<i>SACO Executive Director</i>		31 March 2021
Approved by:	<i>Ms. Lisa Combrinck</i>	<i>DSAC SACO Project Manager</i>		
Approved by:	<i>Dr. Stella (CN) Khumalo</i>	<i>DSAC DDG: Arts, Culture Promotion and Development</i>		