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Nelson Mandela
Metropolitan
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Socio-Economic Impact of the 2017 Cape Town Carnival

Delivered by the SA Cultural Observatory, in
partnership with SADC Research Centre



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MEASURING & VALUING SOUTH AFRICA'S CULTURAL & CREATIVE ECONOMY

Summary

The Cape Town Carnival was established in 2010. The theme for the 2017 Carnival was 'Amaza – Ocean Odyssey.' Main aims of the event included providing opportunities for community participation and networking, building social cohesion, and building tourism and job creation.

Research design was based on the Framework for the Monitoring and Evaluation (M&E) of Publically Funded Arts, Culture and Heritage (SACO, 2016). Data was collected via interviews with audiences, data provided by organisers, and focus group discussions held with community participants in the parade.

In 2017, it attracted an estimated 44 900 people (audience) and a further 1 391 participants in the parade. 65% of the audience were younger than 35 years old, 57% were coloured and 21% were black African. 87% were local Cape Town residents. Of the visitors, 55% were South African, with the rest coming from foreign countries including Zimbabwe, China, Australia, Canada and the USA.

The CTC has both loyal repeat visitors (54% had attended before) and the ability to attract first-time attendees. 40% of the audience rated the 2017 CTC "world class", with another 46% rating it "good for SA". 80% rated it "great" in terms of the cultural diversity of the parade. For visitors, the average length of stay in Cape Town was 5.6 days/nights. 48% of visitors stayed in paid-for accommodation.

Focus group discussion with CTC participants showed good facilitation of diverse participants by organisers using a variety of methods. There were high levels of trust between participants and organisers.

Three-quarters of respondents regarded the cost of food, transport and other things at the CTC "reasonable. Including multiplier effects and excluding local sponsorship, the economic impact of the 2017 Cape Town Carnival on the economy of Cape Town was R41.14m.

Key Findings

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- The 2017 CTC had an audience of 44,900.
- 55% of visitors were from SA, mostly from Western Cape, Gauteng and KZN.
- 45% of visitors were from outside of South Africa.
- The average length of stay in Cape Town was 5.6 nights.
- Home languages: English (66%); Afrikaans (15%); African languages (12%);
- 80% rated the atmosphere "great";
- Participant facilitation included bridging funds, workshops and responsiveness by organisers.
- Average spending at the CTC was R376 per group for local residents and R441 for visitors.
- First round net spending by non-local visitors in Cape Town mainly or only for the CTC was R13.8m.
- Economic impact on Cape Town was R41.14 million.

Table of Contents

1	Background & Context of the Cape Town Carnival	5
2	Research Design and Methods	7
3	Results	9
3.1	The Socio-Demographics of CTC Audiences	9
3.2	Visitor Accommodation and Length of Stay	12
3.3	Previous CTC experiences	14
3.4	CTC Audience Opinions.....	15
3.5	Spending by Visitors and Local Residents at the Cape Town Carnival.....	19
3.6	The Economic Impact Method	20
3.7	The Economic Impact of the CTC on the Cape Town Economy	21
3.8	The demographics of CTC participants	24
4	Focus Group Interviews with Community Participants.....	25
4.1	Perceptions of the participants.....	26
4.2	Social cohesion and community development.....	27
4.2.1	Cultural Diversity	27
4.2.2	Social Cohesion	28
4.3	Enhancing human capital, capacity building and participation in the creative economy	29
4.4	Recommendations for further research	31
5	Summary and Conclusions	33
6	References	35
7	Appendix 1: Data Tables	36
8	Appendix 2: Focus Group discussion	41
8.1	Questions for FGDs	41
8.2	Focus Group Discussion Themes.....	42

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List of Tables

Table 1: Cultural Value Themes, Indicators and Research Methods for the CTC.....	8
Table 2: Visitor Origins.....	11
Table 3: Visitor Length of Stay.....	12
Table 4: Previous attendance at the CTC.....	14
Table 5: Spending (in Rands) at the Cape Town Carnival	19
Table 6: Visitor Spending Calculations	23
Table 7: Organiser Spending Calculations	24
Table 8: Economic Impact of 2017 CTC on Cape Town	24
Table 9: Age and Race groups of CTC parade participants.....	24
Table 10: Summary of Results.....	34

List of Figures

Figure 1: The 5 Cultural Value Themes (SACO, 2016)	7
Figure 2: Festival-goer demographics	9
Figure 3: Festival-goer language, education and income.....	10
Figure 4: Origins of South African visitors.....	11
Figure 5: CTC visitor accommodation.....	12
Figure 6: Information Sources for the Cape Town Carnival (Note that since respondents could choose more than one option, totals add up to more than 100%).....	13
Figure 7: Favourite art forms (Note that since respondents could choose more than one option, totals sometimes add up to more than 100%)	13
Figure 8: Favourite Genres (Note that since respondents could choose more than one option, totals sometimes add up to more than 100%)	14
Figure 9: Other carnival experiences	15
Figure 10: Overall Carnival ratings by audience groups	15
Figure 11: Audience opinions: Costumes and Floats	16

Figure 12: Audience opinions: Atmosphere, cultural diversity and safety	17
Figure 13: Atmosphere rating by age and population groups.....	18
Figure 14: Cultural diversity rating by age and population groups.....	18
Figure 15: Opinions on reasonableness of spending	19
Figure 16: A conceptual model of the multiplier effect (Source: Adapted from Kavese 2012)	21
Figure 17: Arrival and Estimated Departure Times at the 2017 CTC	22
Figure 18: Home suburb of CTC parade participants	25

1 Background & Context of the Cape Town Carnival

The Cape Town Carnival was first conceived in late 2007 and established as an event with just one float and “about 2 000 performers” in the midst of South Africa’s hosting of the 2010 World Cup Soccer¹. It is operated by a non-profit trust. The Parade is free of charge; a limited number of seated tickets on stands have been provided at recent Carnivals.² The Carnival has grown significantly since 2010 with around two dozen floats, an estimated 50 000 spectators, 1 900 performers and 50 participating groups.³ The Carnival - to the public - is a one day event. Most of the core objectives of the Carnival, however, are achieved in the months leading up to the public event during which float builders, musicians, artists, costume designers, performers, dancers, school and other groups hone their crafts and productions and are prepared for the parade.

Each Carnival is organised around a theme with floats and costumes designed accordingly. For example, the themes for the three most recent Carnivals were: ‘Elemental’ (Water, Air and Fire); Street Life; and ‘Amaza – Ocean Odyssey.’ The Carnival has been described by organisers as an event that “brings people together...the street parade event show-cases and celebrates the diversity of Cape Town and South Africa.”⁴

The Carnival Parade is a colourful spectacle of floats, dancers, musicians and performers which takes place in the mild late summer March evening (starting at 7pm). The day of the Carnival includes an opening parade on a Saturday afternoon, mainly of service providers, such as fire fighters, traffic police, health and sea rescue units, followed by the Carnival procession proper along 1.4km of city street – the Fan Walk - culminating in close proximity to the Green Point Stadium, which is also the venue for the ‘after event.’ The Fan Walk is the home to high-rise flats with balconies), businesses and many restaurants, which provide a good view of the street. The event is also well served by vendors of food and refreshments. The Carnival Parade itself is positioned as a “glamorous celebration of African identity, of diverse communities and the transformative power of creativity.”⁵

This is to be achieved by the Carnival:

- Providing opportunities for community participation in arts and culture by groups, and in areas and schools that previously would not have had a purpose or incentive to do so;
- Providing a national and international performance platform;
- Enhancing networks and collaboration in the creative community, arts and culture NGOs, and other carnivals, national and international;
- Ensuring that all participants receive marketing and media exposure, which enhances economic opportunities;
- Building skills;
- Creating an environment of social cohesion for locals and tourists to experience SA creativity and culture; and
- Creating employment and training opportunities in costume and float design and large event logistics; and

¹ CTC 2015 Annual Report p5. The number of performers is possibly an overestimate as the number in recent Carnivals is close to the same total, for example, 1 910 in 2016

² R300/person or R1 300/person for more luxurious seating, with food and refreshments included.

³ CTC 2015 and 2016 Annual Reports

⁴ CTC 2016 p2

⁵ CTC 2016 p6

- Striving to create a significant hub for clothing, costume and set-building industries in the Western Cape.

The objectives of the Cape Town Carnival have been variously stated. The 2014 Annual Report set out the objectives as:

- Social cohesion;
- Economic growth and empowerment;
- Job creation and training; and
- Celebration of shared and separate identities.

The 2016 Annual Report lists the objectives as:

- Stage a world-class parade that is safe and well attended;
- Showcase artistic skills and talents of locals;
- Be a sustainable event, financially, socially and environmentally;
- Attract local and international participation and tourism; and
- Manage and build brand reputation.

In objectives are given effect through an organising team of 16⁶ supplemented by teams (e.g. in 2016 nine in Costumes and three dozen Float Building.) Skills are developed through on-the-job training in the multiplicity of skills required for float building⁷, costume making, events organisation, marketing and PR, and community empowerment.

Cape Town City's bid as the World Design Capital (WDC), achieved in 2014, provided an ideal opportunity to expand the Carnival's design participation.⁸ The purpose of the award by the Council of Societies of Industrial Design (ICSID) "to be transformative and inspiring through vibrant expression of community, culture and creativity." The WRC award was the fillip which led the Carnival's call for submissions by "engineers, architects, designers, innovators and dreamers" as well as engaging with designer-makers and entrepreneurs for design concepts for 'floats or moving structures.' While not specifically stated it could be assumed that the development would well complement the film industry in the City.

While the Cape Town Carnival clearly attracts a good crowd to the street parade and plays an increasingly important in training, development and providing an outlet for arts and culture related industries the immediate impact of the Parade is of prime benefit to businesses in the immediate surrounds.

⁶ CEO, PA and Leads Co-ordinator, Directors (Creative; and Media, Marketing and Sponsorship), Managers (Community Empowerment; Event; Finance), Heads (Production; Costume; Make-up; Floats and Sculpture), Co-ordinators (Float Building; Office and Project), Facilitators (Community; and Music) and Assistants (costume hire; and marketing).

⁷ Skills range from metalwork, welding, carpentry, fabric work, to painting and lighting

⁸ The International Council of Societies of Industrial Design (ICSID) established the 'World Design Capital' to exemplify and honour "those cities that strive towards a common goal – to communicate the prolific and important role of design as a social and cultural stimulator, as well as depict how design (can be) used as a viable tool for economic growth" (CTC 2014 Annual Report).

2 Research Design and Methods

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

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

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



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

The broad themes for cultural value were based on:

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

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

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

Indicators specific to the stated aims of the Festival are set out in Table 1. Research methods included an audience survey on the day of the Carnival (396 interviews), data collected for organisers, and focus groups discussions with local community groups who participated in the Carnival parade.

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

Theme	Indicators	Research Method
Audience Development & Education	Demographics (Age groups; Cultural/Race groups; Gender)	Audience survey
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)	
	Income and Education Groups	
	Participation & time-use	
	Participation (numbers)	Organiser data
	Local residents vs Visitors	Audience survey
	Art form preferences	
Human Capital /Professional building	Demographics of participants/performers	Organiser data & Community focus groups
	Experience gained by participants/performers	
	Development of artistic quality	
	Showcasing South African art and artists	
Inclusive Economic Growth	Organiser spending	Organiser data
	Earned income/Turnover	
	Sponsorship (and sources)	
	Audience spending	Audience survey
	Length of stay (Bed nights)	
	Contribution to Gross Geographic Product/Gross value added	Economic impact calculated using SAFEIC
Social Cohesion & Community Development	Artist/Producer demographics (diversity)	Organiser data
	Audience diversity	Audience survey
	Audience opinions	
	Artist/producer opinions	Focus groups discussions

3 Results

3.1 The Socio-Demographics of CTC Audiences

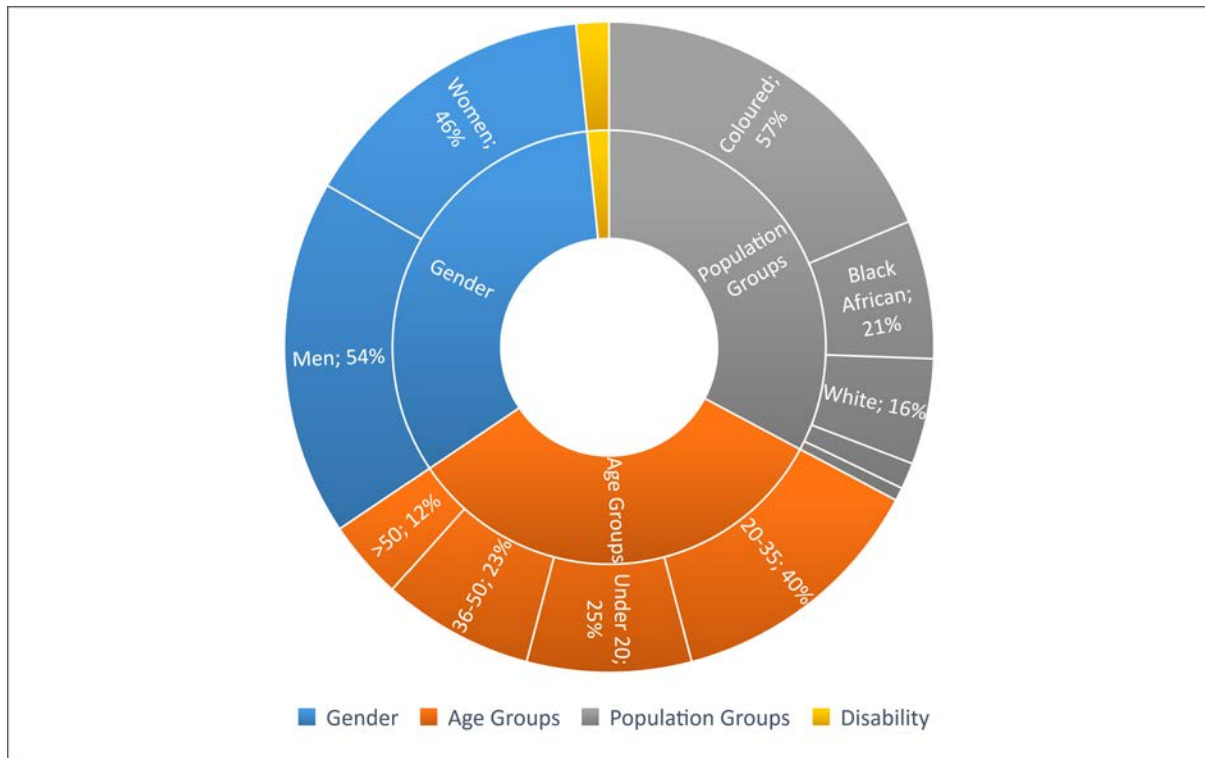


Figure 2: Festival-goer demographics

The CTC attracted a diverse audience in terms of the demographics of festival-goers. In terms of age groups, the two largest categories were young people, a quarter (25%) being younger than 20, and 40% being between 20 and 35 years' old. In terms of gender, the split was fairly even, about half men (54%) and half women (46%). More than half the spectators were coloured (57%), followed by black Africans (21%), 16% white people and 4% Asian or Indian-origin people (2% unsure).

Overall, 5% of festival-goers who were interviewed were disabled, or had in their group someone with a disability. A quarter of these had some disability related to sight, another quarter had a physical disability (such as needing a wheelchair or crutches), 20% had communication or speech impairment, and 12% had a hearing impediment.

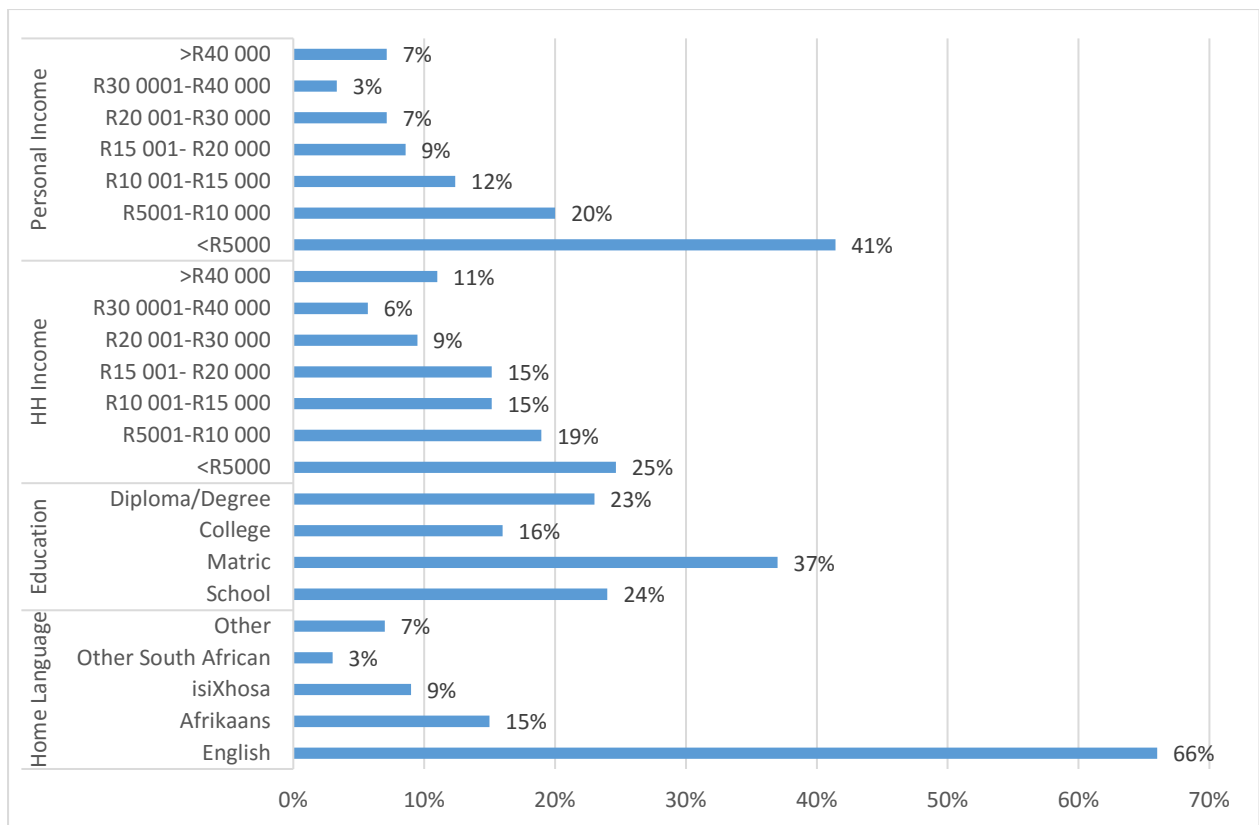


Figure 3: Festival-goer language, education and income

Two-thirds (66%) of festival-goers spoke English as their home language. The next biggest language group was Afrikaans (15%), followed by isiXhosa (9%), other South African languages, and languages from other countries.

39% of CTC audiences had some form of tertiary education, 23% had a university degree or “technikon” diploma, with a further 16% having a college or trade certificate. 37% had completed high school, and 24% had completed primary school only (2%) or completed part of high school (22%). Thus, as found at other cultural events, audiences tend to be spread across socio-demographic groups, but to have a higher proportion of those with tertiary education than in the general population.

Only about 60% of people were willing to answer questions about their household or personal (individual) income per month, after tax – Figure 2 reports figures for those who were willing to answer. As shown in the figure, the largest group in both personal and household income categories was less than R5000 per month after tax (disposable income). 26% of households had after-tax monthly income of more than R20 000, with another 30% having incomes of between R20 000 and R30 000.

Table 2: Visitor Origins

Visitor Origins	Number	Percentage
Local (Cape Town Residents)	315	87%
Non-Local (All)	47	13%
Non-local: South African	26	55% of visitors (7% of all attendees)
Non-local: Foreign	21	45% of visitors (6% of all attendees)
South African	341	94%
CTC main/only reason for being in CT	19	41% of visitors

The sample of festival-goers interviewed showed that the majority (87%) were local, Cape Town residents, while the remainder (13%) were from places other than Cape Town. 94% of festival-goers were South African, with 6% being from other countries (including Australia, Canada, China the UK, Germany, Korea, Saudi Arabia, the USA and Zimbabwe). The wide range of foreign visitors, and the fact that they make up nearly half (45%) of all visitors, is indicative of the international tourist appeal of Cape Town, but it is somewhat surprising that, other than Zimbabwe, no other African countries were represented.

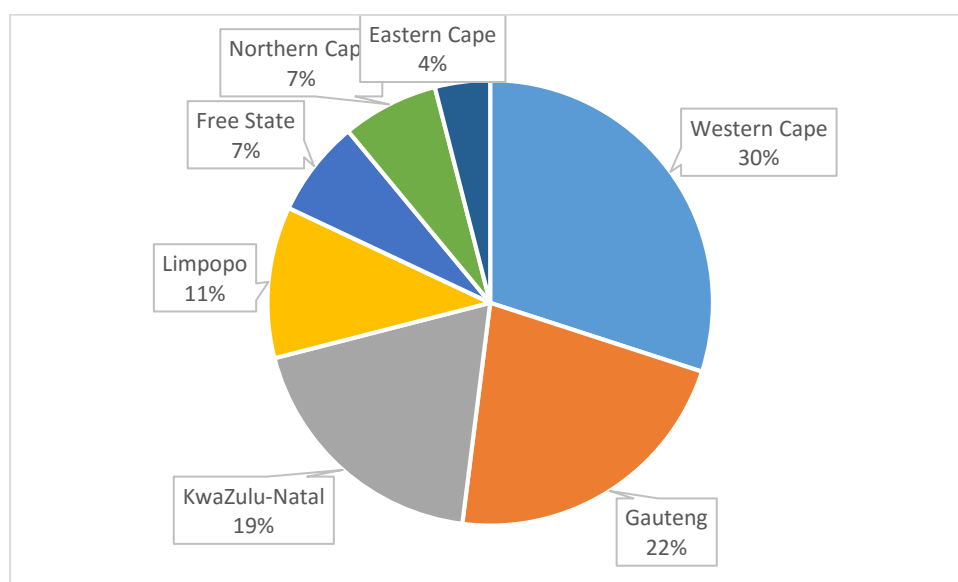


Figure 4: Origins of South African visitors

For non-local South African visitors (who made up 55% of visitors and 7% of all attendees), the biggest group was from other places in the Western Cape (30%), followed by 22% from Gauteng, 19% from KwaZulu-Natal, 11% from Limpopo, and smaller groups from the Free State, Northern Cape and Eastern Cape Provinces. 41% of all visitors reported that the Carnival was the main reason that they had come to Cape Town. This figure is important for determining economic impact, since only the spending of those visitors who would not otherwise have been in the city can be counted.

3.2 Visitor Accommodation and Length of Stay

Only non-local attendees were asked about their accommodation. As shown in Figure 4, half of all visitors stayed with friends and family, followed by 21% who stayed in a hotel, 10% in a Bed and Breakfast (B&B) or guesthouse. Two percent of visitors were day visitors who did not stay over. This data is important because accommodation spending is usually one of the largest visitor spending categories, so the percentage of people in paid accommodation (48% in this case) makes a big difference to final economic impact.

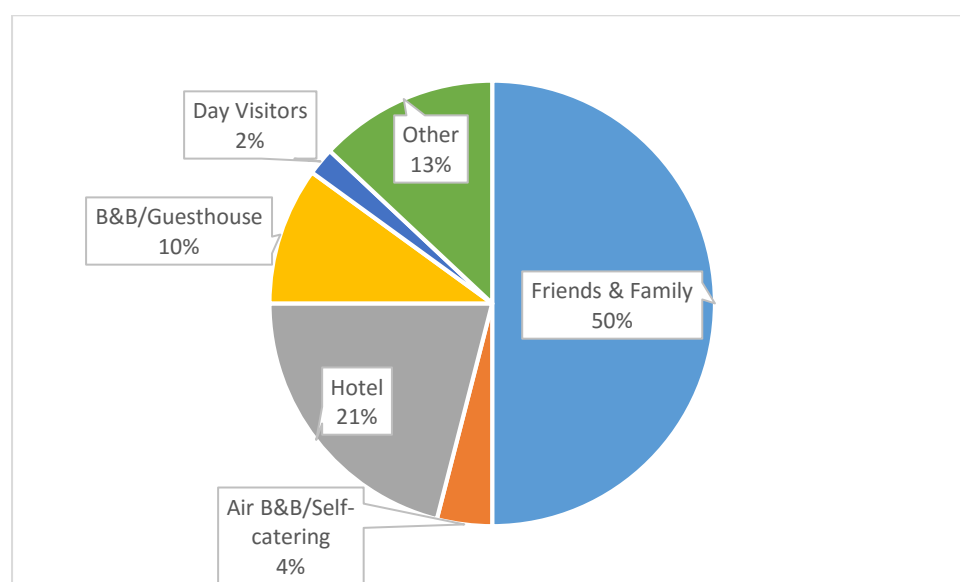


Figure 5: CTC visitor accommodation

For visitors to Cape Town, those who were in the city mainly to attend the Carnival tended to have a slightly shorter length of stay, with an average of 4.7 nights (median of 4). Those who were in the city for other things, but also attended the Carnival stayed for an average of 6.2 nights. The overall average length of stay for non-local residents who attended the Carnival was 5.6 nights.

Table 3: Visitor Length of Stay

Length of Stay	In CT mainly for Carnival	Not in CT mainly for Carnival
0 - 3 nights	50%	26%
4 - 7 nights	28%	41%
8 - 10 nights	17%	7%
> 10 nights	6%	26%
Average	4.7	6.2

Respondents were also asked where they had found out about the Cape Town Carnival. Nearly half (43%) had heard about it via word of mouth, followed by Facebook (18%), Radio (12%) and Posters (10%). Excluding word of mouth, the results show that the internet (Facebook and the website) provided 22% of people with their information, television and radio were an information source for 20% of people, and print media (posters, flyers, newspapers and magazines) were used by 13% of people.

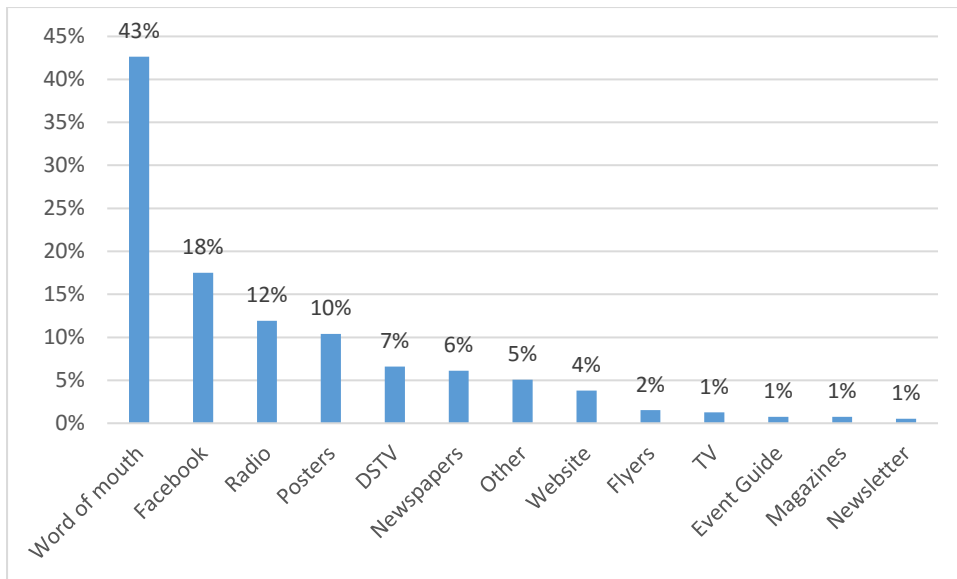


Figure 6: Information Sources for the Cape Town Carnival (Note that since respondents could choose more than one option, totals add up to more than 100%)

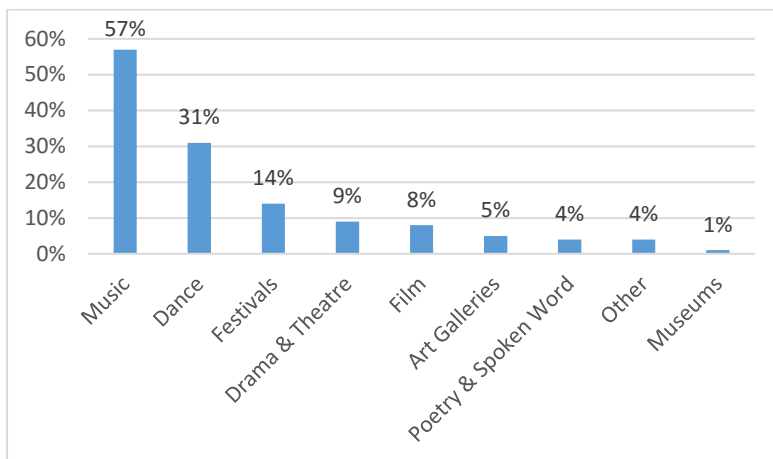


Figure 7: Favourite art forms (Note that since respondents could choose more than one option, totals sometimes add up to more than 100%)

Respondents were asked which art forms or genres were their favourite. The most commonly mentioned one was music (57%) followed by Dance (31%), Festivals (14%), and Drama and Theatre (9%).

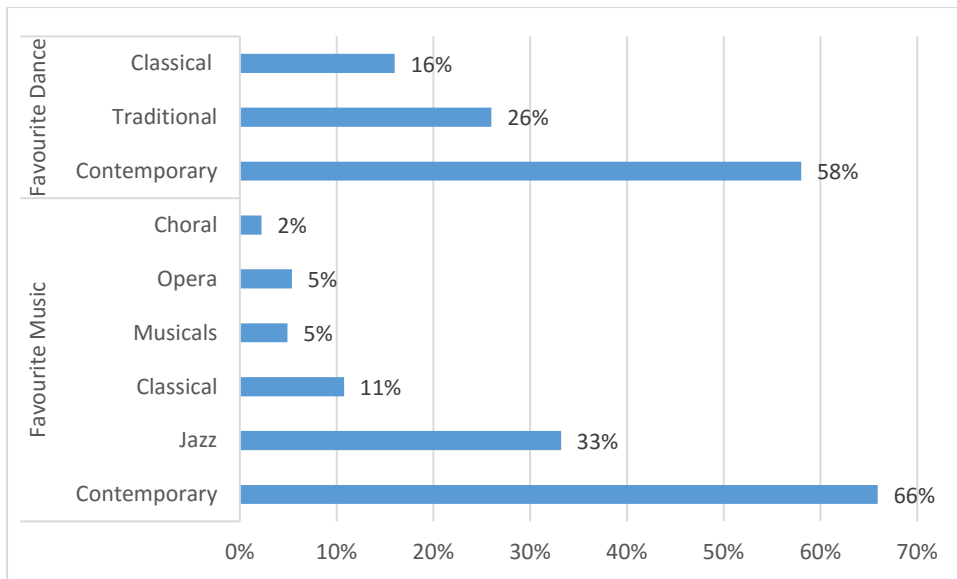


Figure 8: Favourite Genres (Note that since respondents could choose more than one option, totals sometimes add up to more than 100%)

For those who liked music the largest group choose contemporary music (66%) as their favourite type, followed by jazz (33%) and classical (11%). Of those who liked dance, the most popular type was contemporary (58%) followed by classical (ballet, ballroom etc.) (26%) and traditional (16%).

3.3 Previous CTC experiences

Respondents were asked if they had attended the CTC before. Data were analysed by population and age groups in order to determine who the new audiences were, that is who the 2017 first-time attendees were.

Table 4: Previous attendance at the CTC

Previous experiences		Yes	No
Attended CTC before	All	54%	46%
Population Groups	Indian/Asian	43%	57%
	Black African	41%	59%
	Coloured	63%	37%
	White	44%	56%
Age Groups	Under 20	64%	36%
	20-35	41%	59%
	36-50	55%	45%
	>50	77%	23%

Almost half of all 2017 attendees (46%) had not attended a Cape Town Carnival before, which shows that the event is having considerable success in attracting new audiences, while still maintaining a loyal “core” (54%) of returners. There were more first-time attendees amongst Indian/Asian, Black African and White population groups than Coloured people, indicating increasing racial diversity of the event. In terms of age groups, the largest proportions of first-time attendees were in the 20 – 35-year-old group, indicating that the Carnival is successful in attracting new, younger audiences.

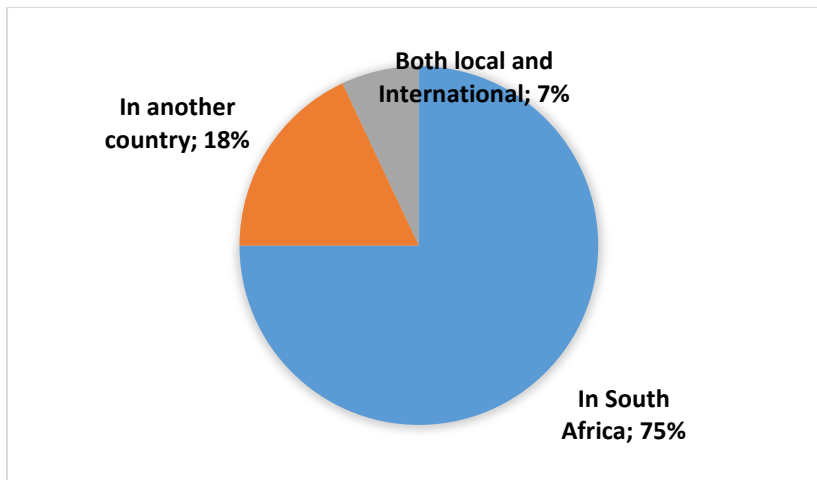


Figure 9: Other carnival experiences

Respondents were asked if they had “been to other carnivals like this one”. Only 38% of visitors had been to other carnivals. For this group, most (75%) had been to other carnivals in South Africa, 18% had been to carnivals in another country, and 7% had been to both local and international carnivals.

3.4 CTC Audience Opinions

Respondents were asked for their opinions of the Carnival overall, and of various aspects of the event, such as the quality of the floats, cultural diversity of the parade, atmosphere etc. In order to better understand how different audience groups rated the carnival, responses were analysed with reference to local Cape Town residents and visitors, population groups and age groups.

For the overall evaluation of the event, audience members were asked to respond to: Would you say the Carnival is: World Class; Good for South Africa; Could be better/needs improvement.

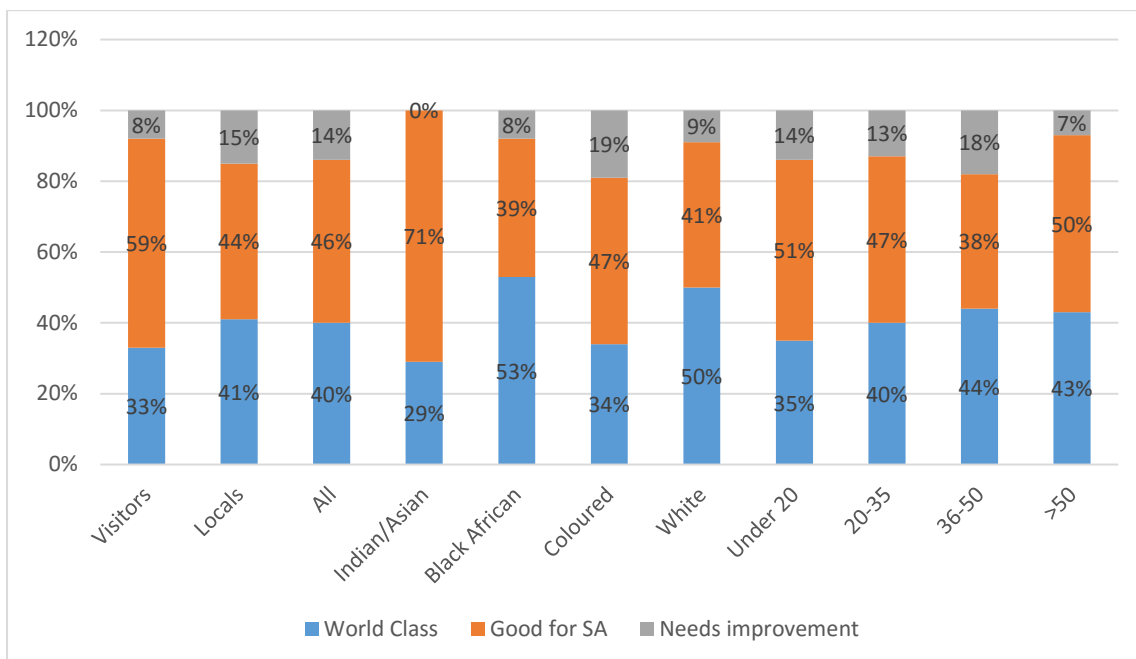


Figure 10: Overall Carnival ratings by audience groups

As shown in Figure 5, 40% of all the respondents rated the Carnival “world class”, with a further 46% rating it “good for South Africa”. Only 13% felt that it could be better or improved. Local residents were more positive about the overall quality of the Carnival than visitors, while black Africans and Whites were more positive than people of Indian/Asian origin or Coloured people. This last result may be a bit of a concern to organisers, since coloured people make up the majority (62%) of the audience.

In terms of age groups, the 36-50 age group had the highest proportion of those who rated the Carnival “world class”, but also had a higher percentage of people (18%) who said that it needed improvement. While interesting, it should be remembered that the answers to this question would be at least dependent on other experiences that individuals may have had of, for example, carnivals in other countries (related to the “world class” rating) or within South Africa (related to the “good for South Africa” rating).

A second part of the opinion survey asked respondents to rate various aspects of the Carnival on a four point scale: Great; Could be better; Unsure; or Too early to say/has not started yet/just arrived.

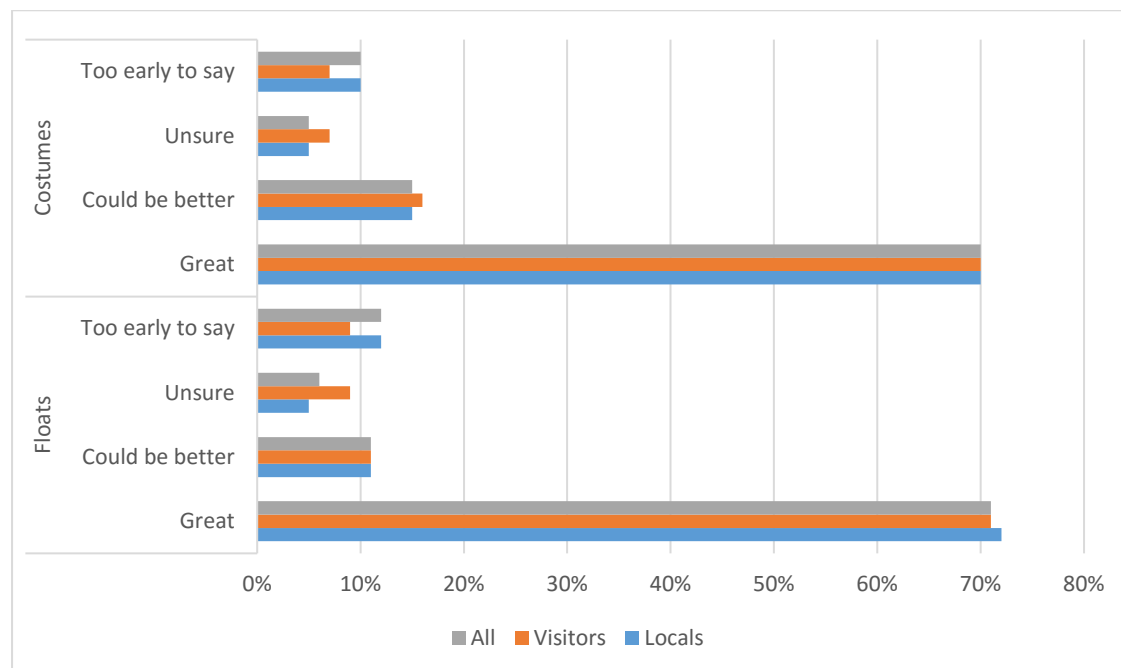


Figure 11: Audience opinions: Costumes and Floats

The vast majority of CTC audiences (70%) were very positive about the quality costumes and floats, giving them a “great” rating. Smaller groups (11% for floats and 15% for costumes) said that they “could be better”.

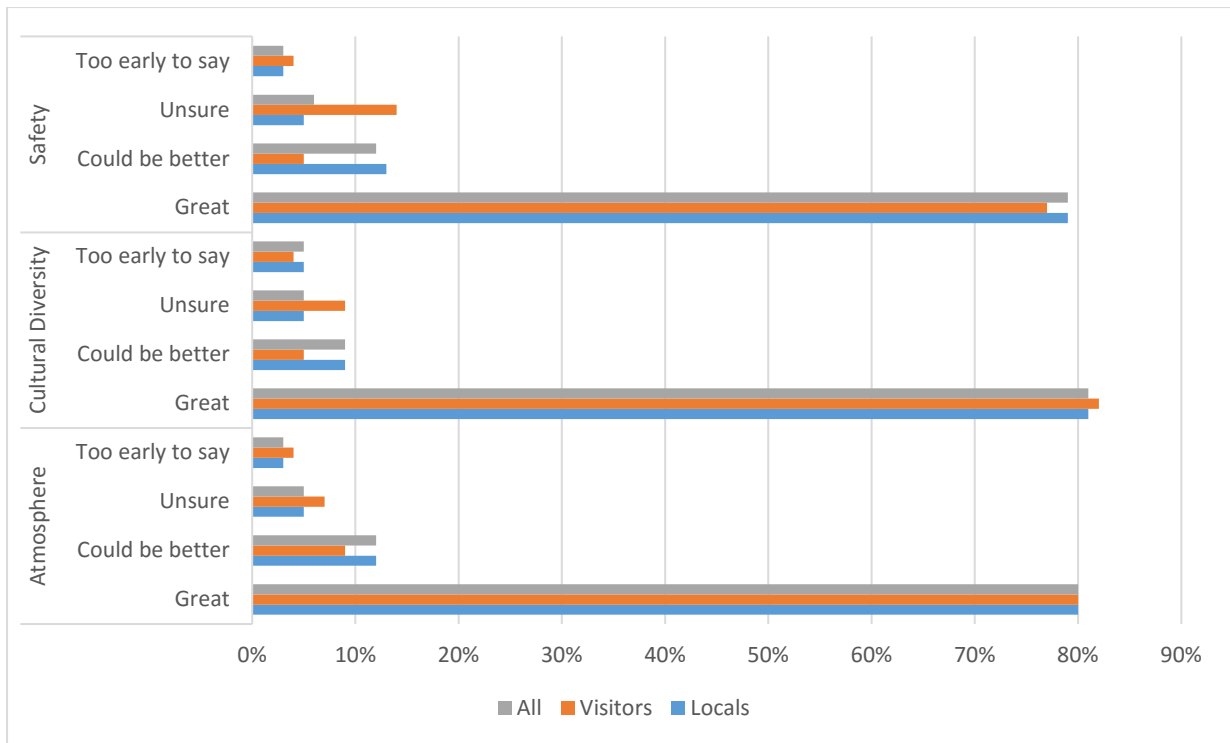


Figure 12: Audience opinions: Atmosphere, cultural diversity and safety

In terms of overall “atmosphere, energy and vibe”, 80% of respondents gave a rating of “great”, with slightly more local residents (12%) than visitors (9%) giving it a rating of “could be better”. Ratings for the diversity of cultures represented in the parade were also generally high (81% gave a “great” rating), with again a slightly higher proportion of local residents (9%) than visitors (5%) giving it a “could be better” rating. Carnival safety was also highly rated (79% giving it a “great” rating), although more local residents this time giving it a “could be better” rating (13%), than visitors (5%). Overall, aspects of the carnival were given very high ratings by the majority of the audience, which organisers can be proud of.

Some of the indicators were compared between population groups and age groups. The figure below shows the comparison for the indicator on “atmosphere, energy and vibe”, which was given a “great” rating by 80% of respondents overall.

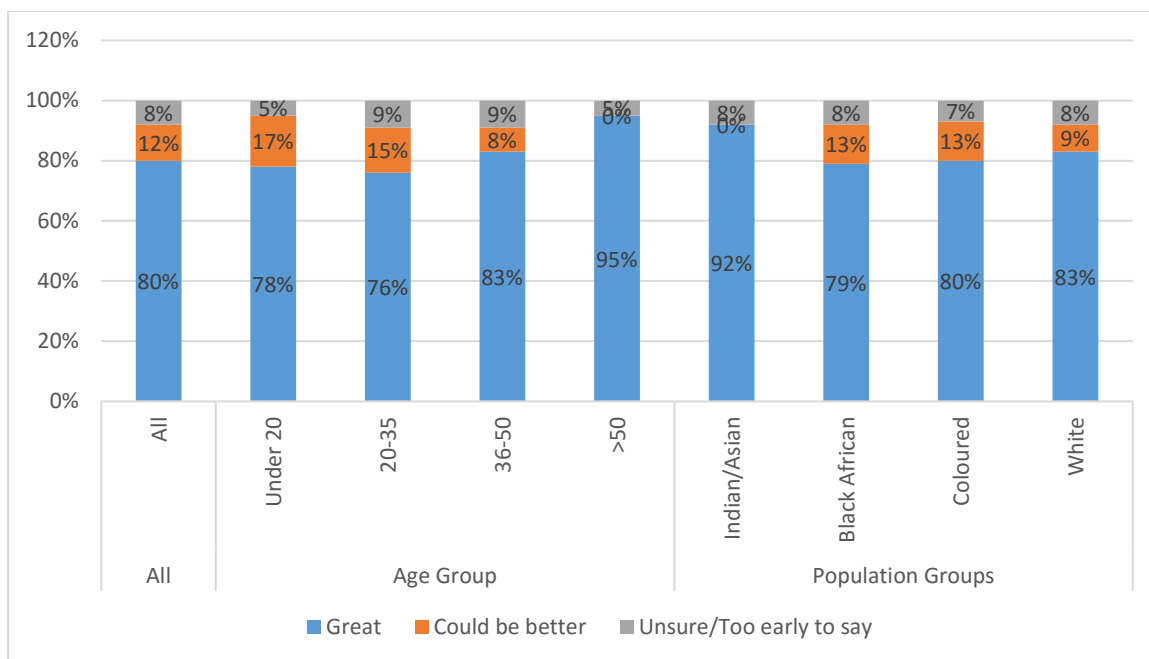


Figure 13: Atmosphere rating by age and population groups

In terms of age groups, the most positive groups tended to be older: 83% of those 36-50 years old, and 96% of those older than 50, rating the atmosphere “great”, compared to lower ratings from the under 20s (78%) and 20-35 year olds (76%). While the differences are interesting, and suggest that a slightly smaller percentage of younger people gave the “vibe” at “good rating, the differences are not large, and the overall ratings good for more than three quarters of any age group. Similarly, in terms of population groups, ratings were generally high across the board, but with more of those of Indian/Asian origin (95%), and White people (83%) rating the atmosphere “great”⁹.

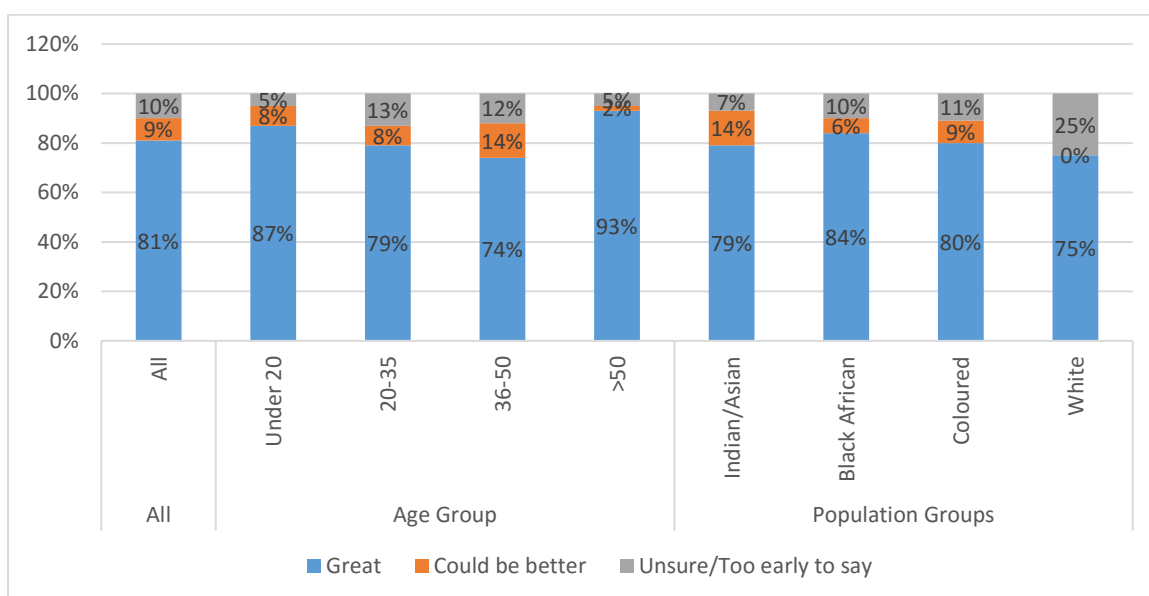


Figure 14: Cultural diversity rating by age and population groups

⁹ However, one needs to keep in mind that the sample of people of Indian/Asian origins was small (14), making the results less reliable for this kind of comparison.

81% of festival-goers overall rated the “diversity of cultures represented in the parade” as “great”. This was higher than average for the under 20s (87%) and for the over 50s (93%), but generally high for all age groups. The vast majority of all population groups were positive about cultural diversity , but especially black Africans (84%) and coloured people (80%), with a smaller percentage of white people (75%) giving this aspect of the Carnival a “great” rating.

Respondents were asked if they were likely to come back to the Cape Town Carnival next year. As one would expect from the generally high opinion ratings, 96% said they would come back, and 98% said they would recommend the Carnival to friends.

3.5 Spending by Visitors and Local Residents at the Cape Town Carnival

All respondents were asked: “How much will you spend on transport/food/other purchases tonight?”. As shown in the table, local residents spent an average of R376 (median of R250), while non-local visitors spent an average of R441 (median of R250). For both groups, food made up the largest proportion of total spending (58% for local residents and 64% for visitors).

Table 5: Spending (in Rands) at the Cape Town Carnival

Spending		Transport	Food	Other	Total
Local Residents	Average	106.79	216.7	52.8	376.29
	Median	100	150	0	250
	Standard Deviation	98.96	263.39	96.25	
	Percentage of total	28%	58%	14%	
Visitors	Average	86.31	280.93	73.48	440.72
	Median	50	200	0	250
	Standard Deviation	83.49	226.18	138.71	
	Percentage of total	20%	64%	17%	

Respondent were also asked they regarded their reported spending amounts as: Very reasonable, Reasonable, or Expensive.

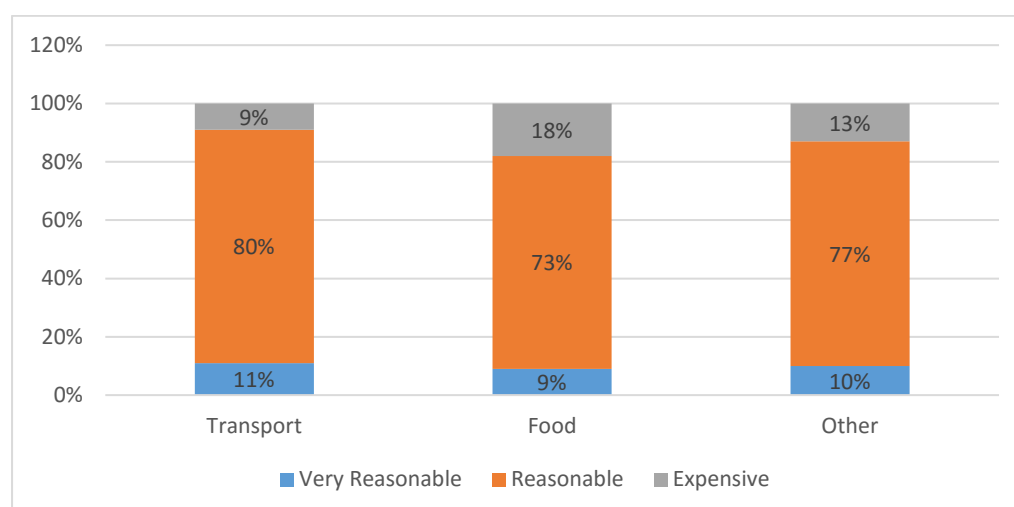


Figure 15: Opinions on reasonableness of spending

As shown in the figure, the majority of people in all three categories regarded the spending amount as “Reasonable”, especially in terms of transport. Food was regarded by a somewhat more people as “Expensive” (18%), but it seems that, overall, a trip to the Cape Town Carnival is regarded as affordable by most people.

Most people (57%) reported spending “for just yourself”, but a third (32%) were paying for other people as well, while 11% were being paid for by someone else. Excluding a few atypically large group sizes, the average group size was 1.9 for both visitors and local residents.

In calculating the economic impact of the Cape Town Carnival, only spending by non-local visitors who would not have been in Cape Town if not for the Carnival can be counted. However, these visitors did not only spend at the Carnival – they would also have spent on accommodation, food, souvenirs etc. while they were in the city, during the rest of their stay. Since the 2017 CTC questionnaire did not include questions on spending during the whole trip, averages from the South African Domestic Tourism Survey were used.

The SA Domestic Tourism survey is administered by Statistics South Africa and asks about spending of accommodation and non-accommodation (food and drinks, shopping, entertainment) spending. The data is also divided by purpose of trip (such as business, holiday, medical, religious etc.). Using this data, and focusing on those who travelled to the Western Cape for holidays, average accommodation spending per night (for those who staying in paid for accommodation) was R662. Non accommodation spending per person per day was R442 (SAFEIC Guide, 2017). This means that, for every day that a visitor who had come to Cape Town mainly to see the Cape Town Carnival, the city gained R1 104 of “new” money. This will be further explained in the section on Economic Impact.

3.6 The Economic Impact Method

Tourism events attract “new” money into the impact region and create direct and indirect impacts through re-spending of the initial injection. Economic impact studies attempt to answer the question, “If the event had not taken place, what would the loss of revenue to the impact area have been?” An economic impact study thus calculates all the additional economic activity that takes place in the region as a result of the event. This means that normal expenditure by local residents and expenditure that is likely to have taken place anyway, should not be included. The same applies to sponsorship from inside the impact area, since it is likely that, even if the event had not taken place, this money would still have been spent in the impact area on something else (Crompton et al, 2001; Crompton, 2006; Snowball, 2008).

Economic impact starts with the first round, or direct impact, of spending by visitors and festival organisers, although some of this spending flows out of the system immediately in the form of profits and manufacturer margins. Indirect and induced expenditure is stimulated in the impact area as the initial injection is re-spent (known as the multiplier effect). Indirect impact results from the successive rounds of spending that take place as the new money within the region is re-spent. Induced impact refers to the next round of spending caused by the change in income and as a result of stimulated production. Total impact is the sum of direct, indirect and induced impact.

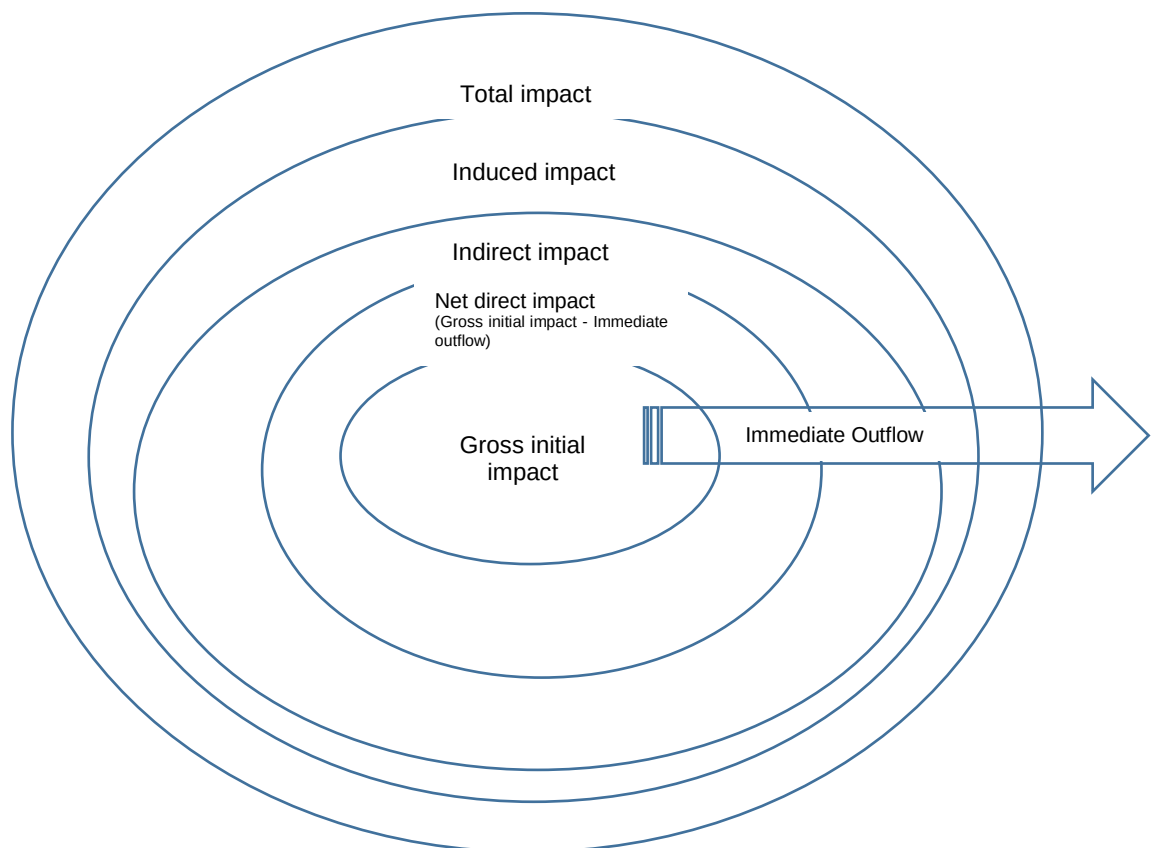


Figure 16: A conceptual model of the multiplier effect (Source: Adapted from Kavese 2012)

The size of the multiplier (which determines the size of the indirect and induced impacts) depends on the characteristics of the impact area. The smaller the area, the greater the amount of re-spending that takes place outside of it (referred to as “leakages” from the system), and the smaller the multiplier.

Since Input-Output tables are not generally available in South Africa at municipal or city level, multipliers can be estimated using “Rough set” analysis, which is based on previous studies adjusted for the characteristics of a particular host city.

There are a number of common errors made when calculating economic impact. One of the most important is the over-estimation of the multiplier, defined as the “failure to adapt the multiplier to the specific region, including the failure to recognize that smaller less self-sufficient regions have smaller multipliers due to more extensive spending leakages (Seaman, 2012).

The economic impact of the CTC was calculated by using the South African Festivals Economic Impact Calculator (SAFEIC), developed by the South African Cultural Observatory (Snowball and Seaman, 2017). It has been carefully, and conservatively, designed so as to produce results that are as reliable and valid as possible for a wide range of events. SAFEIC estimates some parameters, but there can be overridden where visitor survey data was collected on a particular variable.

3.7 The Economic Impact of the CTC on the Cape Town Economy

The economic impact of an event the Cape Town Carnival represents what the city would have lost, in terms of spending, if the event had not taken place. This means that only the spending visitors from

outside the city (13%), who were there mainly or only to attend the CTC, that is, they would otherwise not have come, (41%) can be counted. The first task is to estimate the total size of the audience.

The Jacobs method of crowd counts uses photographs to estimate the density of crowds per square meter. The area in which the crowd was found is then estimated and multiplied by the crowd density in order to estimate overall crowd size.

The distance between the Napier Street intersection and the finish at the Ashstead Road intersection (the Carnival Parade route) is a distance of 1.4km (1400m). Based on the photographs, both sides of the road were lined with people standing between 4 and 6 deep, lining the whole route length without spaces between them, with some places having stands placed behind the crowds holding more people.

From the guidelines provided from a PhD study on crowd flows and density (Still, 2013) applied to photographs of the Carnival route, it is estimated that the standing crowd size was 33 600 (an average of 6 people per square meter with an average depth of 2m on each side of the route). Organisers estimated that there were an additional 7500 people walking behind the stationary crowd, queuing for vendors etc.

In addition to those standing or walking, some audience members (estimate of 1 900) were seated in bars, watching from elevated viewing areas, in restaurants along the route etc. There was also steady stream of people arriving and leaving during the evening (organiser estimate of 1000). Arrival and departure times collected via the visitor survey confirm this, showing that the most common arrival time was between 5pm and 7pm (38%) and the most common departure time was between 9pm and 11pm (45%). However, there was also a significant part of the audience who arrived later (29% arrived after 7pm) and left later (27% left after midnight).

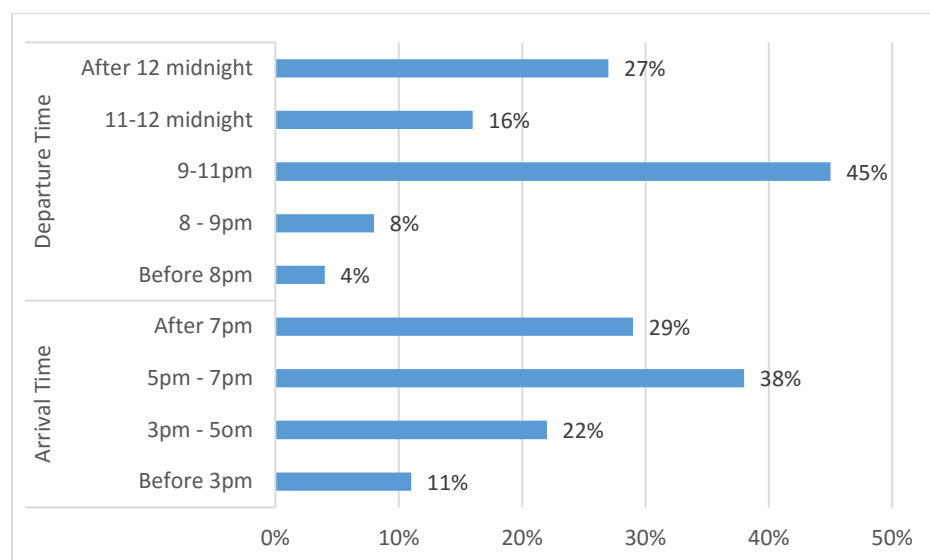


Figure 17: Arrival and Estimated Departure Times at the 2017 CTC

The overall estimate of an audience of 44 900 (which excluded the 1 391 Carnival parade participants), seems quite reasonable and is what is used here to estimate economic impact.

Data	Source	Value
Total number of audience	Survey & Organiser data	44 900
Total number of non-local visitors	Visitor survey (13%)	5 837
Total number of non-local visitors in Cape Town mainly or only to attend CTC	Visitor survey (41%)	2 393
Average length of stay for visitors in Cape Town mainly or only to attend CTC	Visitor survey	4.7
Average per person per night spending on accommodation	SA Domestic Tourism Survey data, averages for Western Cape, adjusted for inflation.	R662
Average per person per day spending on non-accommodation goods & services	SA Domestic Tourism Survey data, averages for Western Cape, adjusted for inflation.	R442

The table above shows the data entered into SAFEIC in order to estimate the gross economic impact of visitors in Cape Town to attend the CTC. There are two broad spending categories: Accommodation spending (for the 48% of visitors who paid for accommodation) and non-accommodation spending on things like food and drinks, shopping etc. Note that it is not only the spending of these visitors at the Carnival itself that can be counted, but also their other spending during their stay: since the CTC was their main or only reason for coming to Cape Town, if it were not for the CTC, they are unlikely to have come at all, and all their spending would thus have been lost to the city. Gross visitor spending is thus estimated at R15.7m. However, it is acknowledged that some of this spending is likely to flow out of the city almost immediately through, for example, spending on goods and services that were not produced or had some value added, locally. However, since Cape Town is a large metropolitan area, the local capture rate is high (88%, implying a 12% immediate outflow), resulting in a net first round visitor spending impact of R13.8m.

Table 6: Visitor Spending Calculations

Visitor spending	Amount
Visitor spending for accommodation	R3,574,132
Visitor non-accommodation spending	R12,125,784
Total gross visitor spending	R15,699,916
Local capture rate	0.88 (88%)
Total net visitor spending	R13,815,926

Organiser spending can be sourced from sponsorship and/or from earned income from renting space to vendors, programme sales, VIP tickets etc. However, just like visitor spending, only spending that is funded from non-local sources can be included. For example, sponsorship from the City of Cape Town received by the CTC was not included, since it is reasonable to assume that, even if the CTC had not taken place, the City of Cape Town would still have spent the money in the city, albeit on something else.

Table 7: Organiser Spending Calculations

Organiser spending	Amount
Total Organiser Spending on Event from non-local sources, including sponsorship & earned income	R10,340,485
Percent Organizer Revenue Spent Locally	0.85 (85%)
Total Organiser Amount Spent Locally	R8,789,412

Total organiser spending on the CTC in 2017, excluding local sources of sponsorship and including earned income was R10.3m. However, not all organiser spending goes to local service providers, so some of the spending “leaks” out of the city immediately. In general, the larger and more diverse the host economy, the smaller are the leakages. For an impact area the size of Cape Town, it is assumed that 15% of organiser spending goes to service providers outside the city (that is, 85% of organiser spending stays local). This was confirmed as a reasonable estimate by CTC organisers. Total organisers spending captured locally is thus R8.78m.

The last step in economic impact studies is to estimate the impact of the successive rounds of spending as the “new” money brought into the economy by the event is re-spent. This is known as the multiplier effect. For an economy the size of the Cape Town metropolitan area, the multiplier is quite large (estimated to be 1.82). This can be compared to multipliers used in similar studies of much smaller impact areas like the National Arts Festival in Grahamstown, which had a multiplier of 1.18, or the Klein Karoo Nationale Kunstefees (KKNK) on Oudtshoorn (1.43).

Table 8: Economic Impact of 2017 CTC on Cape Town

Category	Amount
Total Organiser Amount Spent Locally	R8,789,412
Net Visitor spending	R13,815,926
Total captured Spending in Impact Area	R22,605,338
Indirect Multiplier Effects: Local Output Multiplier	1.82
Total Economic Impact	R41,141,716

Taking into account the successive rounds of spending, the economic impact of the 2017 Cape Town Carnival on the economy of Cape Town was R41.14m. This represents the spending that would have been lost to the city if the event had not taken place.

3.8 The demographics of CTC participants

After the event, information on the number and demographics of CTC parade participants was obtained from organisers. As shown in the table, participants were mostly young (47% were less than 18 years old, with a further 33% between 18 and 35 years old). Participants were also from diverse racial groups, with the largest group being coloured people (54%), followed by black Africans (34%).

Table 9: Age and Race groups of CTC parade participants

Age groups	Percentage
<18	47%
18-35	33%
>35	20%

Race	Percentage
Black	34%
Coloured	54%
Asian	7%
Indian	3%
White	1%

The area or suburb of Cape Town from which participants came was important in demonstrating the reach of the event. As shown in the figure, the best represented suburb was Athlone (18.5%), followed by Mitchell's Plain (10.4%) and Gugulethu (9.1%). In total, 26 suburbs were represented (the full list is available in the Appendix tables), which demonstrates wide participation.

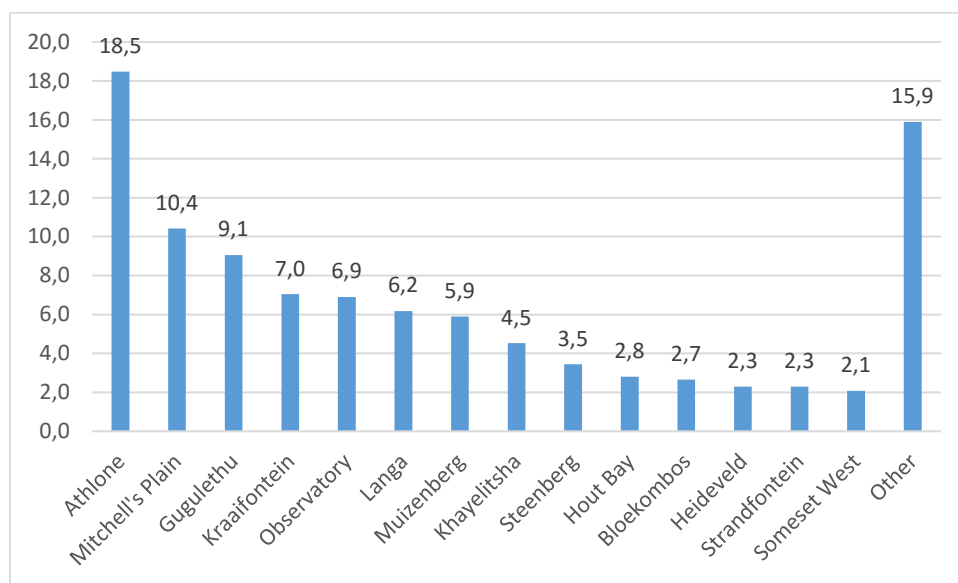


Figure 18: Home suburb of CTC parade participants

4 Focus Group Interviews with Community Participants

This section of the evaluation of the Cape Town Carnival draws on discussions with 20 participants who represent 18 of the local, community based organisations/groups that work with the CTC management team to produce the event.

The cultural values and themes outlined in table one in this report, have been used as a framework to explore the community participants perceptions of the social and economic contribution of the Cape Town Carnival. Specific emphasis has been placed on the participants perceptions of the social and intrinsic values of the carnival parade and the work leading up to the event day. However, given their prolonged involvement in the event and the experiences they bring from different parts of the city, their opinions on audience development and economic growth are also highlighted.

Two focus group discussions were arranged in collaboration with the CT Carnival. It is useful to note that there was an initial discomfort among participants as they did not want to appear to be critical of an event which had so much positive impact on their lives and work as artists. Participants needed

some prodding to raise and explore some of the areas for improvement. Once participants were assured of confidentiality, and the earnestness of the research process, they openly contributed valuable insights which they had clearly thought about before.

Whilst the CT Carnivals goals and objectives are quite clear in terms of the value of the carnival to the “city at large”, the management team could more clearly define the intended outcomes for the beneficiaries who are also participants. It is perhaps through the process of participation that the carnival makes its greatest contribution to social cohesion and the embodiment of the diversity of the city. It would thus also be valuable, even beyond the scope of the CT Carnival management, to explore the meanings of ‘community’ that are emerging from amongst the participants, because within the ambit of the production of the carnival, the membership to different communities was identified as complex and not necessarily bound by the confines of race, economic status or geography.

4.1 Perceptions of the participants

Participants were extremely positive about the carnival and its improvement over the years. They were particularly impressed with the ways in which the carnival team listened and the lengths which they went to engage participants and groups in dialogue about their needs, their presentations and so on.

Participants felt that there were areas for improvement. Some of these include: better quality of food on the day of the carnival, activities for younger people whilst waiting for the parade, bus services to drop children at their homes as opposed to schools as children would have to walk in insecure environments. Participants felt that the carnival ended as an anti-climax and there were suggestions made for a better winding down of events on that night. Aspects such as lighting and communication with participants whilst in the parade were also raised as areas for improvement.

From reflection of the discussions with participants there are key mechanisms that enhance the achievement of the CT Carnivals objectives. The most successful of which appear to be:

- The Building Better Team (BBT) workshops;
- The interaction at the start of the parade, when the teams get to see each other and socialise informally;
- The absence of competition; and
- Care and thoughtfulness of the CT Carnival management.

Whilst some mechanism could be (further) developed to enhance the achievement of objectives, including:

- Using social media and communications tools to enable greater interaction between participants from across community groups;
- Sharing a database of the talent within the community groups;
- Coordinating more events “in the communities” during the course of the year with opportunities for groups to see each other performing;
- Improving marketing in the communities where the groups are located to encourage friends and family of participants to attend the carnival;
- Transport; and
- Conceptualising an improved end of the parade, which seems like an anti-climax for participants.

A summary of the main points of the discussions is presented against the key themes of: Social cohesion and community development; and enhancing human capital, capacity building and participation in the creative economy.

4.2 Social cohesion and community development

The participants spoke of both cultural diversity and social cohesion in enlightening ways that would benefit from further study. Participants felt that the ideas of social cohesion and cultural diversity were interlinked and relational and so addressed questions one and two of the discussion questions (see appendix for discussion questions) interchangeably. This conflation of terms is an interesting phenomena and perhaps invites further investigation.

4.2.1 Cultural Diversity

Given that the aims of the Cape Town Carnival highlight representation and celebration of the cultural diversity of Cape Town and South Africa, participants were asked whether the carnival was achieving these objectives and what could be done to make the carnival more representative and diverse.

Participants felt that the CTC succeeded in facilitating diversity of participating groups and cultural practices. Some of the key factors identified within the FGD which contribute to fostering the diversity of groups involved were:

- the regular and well organised BBT workshops which provides opportunities for group leaders to interact meaningfully and over a sustained period,
- the identification of themes which are cross cutting and allow for interpretation and creativity at a local level,
- the scouting and talent management skills of the CTC team; and
- the sustained interest and care of the CTC in groups (so that it leads to continuity and low drop- out rate).

Participants also identified the bridging funds made available to groups, as an important enabler of their participation, and thus a critical factor for ensuring that participant groups are drawn from across the social and economic spectrum.

Participants applauded the CTC management and team for their high levels of professionalism and their ability to listen and respond concretely to needs as well as to broadening the scope of the carnival. The CTC team was also commended for the ways in which they increased visibility to existing groups that were not well known by identifying them firstly within community, providing support and eventually through their presence on Parade. This was felt to be a major contributor to the inclusion of diverse groups. The means through which the CTC straddled such a large geographical area and growing the number of participating groups each year was commented on by the group leaders. The process of identification and diversifying of artistic practices from belly dancing to big band music was one of the factors mentioned by group members as illustrating the range of diversity of peoples and artistic forms available within the CTC.

The level of trust and confidence between participants of the FGD and CTC management appeared to be very high. This was reiterated by one group's comment, "that we are in this together". Whilst this was commented on during the discussions about cultural diversity and inclusion, it is also a key contributing factor to the experiences of social cohesion that the group spoke of.

One group identified that there was a lack of participation at carnival parade level by white South Africans/Cape Townians. It was also interesting to notice that there seem to be no groups from the Atlantic Seaboard, or City Bowl participating in the carnival. An additional observation, although not raised by the participants themselves, is a seeming absence of the representation of immigrant communities from other African countries.

An interesting discussion was pursued in one group about the need to make the representation of groups which straddle spatial or geographical divides of Cape Town, through shared interests and therefore culture, more visible. A group singled out during this discussion was skateboarders, who are already participating in the parade but represent a cultural identity that supersedes narrower racial, class and geographic representations of identity. Strategies for deepening the diversity of cultures participating in the carnival, recommended by the participants included:

- extending the length of time for participants to interact with each other both pre-, during and post- the parade with clear activities and sharing of competencies and creative forms;
- diversifying scouting strategies for new, emerging and established talent, including conducting a survey of all of the cultures present and active within the Cape Town area to inform greater participation and representation, also including groups from the greater rural or outlying areas;
- promoting carnival related activities at local level in the areas where the groups are located) would increase visibility of the carnival and attract greater participation; and
- facilitating cross-pollination between groups from diverse communities.

4.2.2 Social Cohesion

Another aim of the Cape Town Carnival is to build social connections, networks and intercultural understanding, broadly referred to as social cohesion. The participant groups were asked if the CTC Carnival managed to achieve this. The participants justified their opinions and also made recommendations on how social cohesion could be enhanced.

All groups emphasised the back of house opportunities which arose for interaction and sharing between participants. Anecdotal stories were shared of genres and skills exchanged informally between participants of various groups, as a key form of intercultural exchange. Furthermore, sustained interaction between group leaders at the BBT workshops was also raised as a contributor to social cohesion and unity. The availability and provision of resources (these include, letter of participation so that groups may access funding, costumes and specialist support) was once again raised as an important enabler to ensuring participation and a sense of belonging. The provision of a common cross-cutting and non-partisan theme was identified as a critical component to building social cohesion, though there was one group which identified the need for having more than one theme to encourage diversity.

An interesting point of discussion was related to the importance of the absence of competition in the carnival. Participants indicated that the emphasis on achievement, as a collective, was a key factor for successful cohesion outcomes. It was strongly felt that the introduction of competition and prizes would negatively impact the overwhelming positive sense of unity.

Strategies and actions for enhancing social cohesion recommended by the participants included:

- Greater and more effective use of (a) social media for groups to stay in touch and share events and ideas; and (b) a detailed participant database indicating skills and talents would support the building of closer inter-group relationships. These tools and opportunities, were identified as a potential enabler for participants to initiate self-driven collaborative projects beyond the scope of the CTC.
- Increased use of media and communications as indicated above, combined with more frequent events during the year were suggested by participants, as ways of creating wider exposure of their work and talent and lead to demand for services; fostering a greater interest by members of their communities to participate in and attend the carnival; and for allowing the groups to attend each others mini-events, and get to know each other.
- All of the groups commented on the need for a “reasonable¹⁰ debriefing” after the carnival and that the ending always felt like an anti-climax. Some suggestions were for the staging of an after party at the end of the route for the adult participants to socialise, and/or for the carnival to culminate on one of the nearby sports grounds so that the participants could watch parts of the performance as well.

The CTC presents a valuable opportunity for studying extensively the notion of social cohesion, the construction of experiences to foster it and the means through which it can be deepened. It also provides an excellent opportunity for developing indicators which could demonstrate or provide evidence of how it can be catalysed, nurtured and measured. This kind of study would do well in presenting a case study to the National Department of Arts and Culture for its social cohesion programme deliverable, as well as to the UNESCO Urban Cultures process.

It was particularly interesting to have participant groups speak extensively about the absence of competition as having a role to play in nurturing social cohesion. The relationship between competition for resources and conflict has long been studied by peace builders across the world and this may once again, present an interesting case study with respect to the building of peaceful communities in the city where resources are constrained and unevenly distributed¹¹. The resources provided by the CTC appears to be a critical factor in supporting social cohesion. The ways in which ‘need’ was defined and applied by the CTC was appreciated by participants.

4.3 Enhancing human capital, capacity building and participation in the creative economy

Through the creative platform and processes provided by the CT Carnival, the intervention aims to provide opportunities for creative people, like dancers, actors, designers, artists and costume makers, to showcase their work. This objective is argued to contribute to the economic, social and intrinsic value of the carnival, through creative practice and production.

¹⁰ This term was used by the participants but was not probed during the discussions.

¹¹ Studies conducted by; FAO, UNEP, UNECA, Insight on Conflict, Chatham House and so on

Whilst the social and intrinsic value of participation has been clearly spoken about in the groups, the investigation of the economic value requires a different analytical approach. It is not possible to yet identify the extent to which the carnival has successfully helped participants working in the creative sector to get jobs and sell products, make career choices, or participate in the creative economy for a few key reasons. Firstly, the CT Carnival's objectives in this area are a little unclear. Secondly, a baseline study including an audit on the level of skills available within the groups would need to be conducted followed up by future study to identify how skills have developed. Thirdly, research on the degree to which the carnival enabled career choices, and participation in the creative economy would need to be more routinely and systematically conducted.

Whilst the groups were less articulate about the economic value of the carnival, participants discussed that the availability of choreographers and professional costume and float builders as mentors were important for advancing, and developing relevant skills and knowledge. One group pursued a lengthy discussion about the limited time and budget allocated to experts for interaction at community level and felt disappointed and “let down” by the quality of support they had expected. This was discussed by one group where they felt that the choreographer who had been appointed to assist, had a limited contract period which was too short for making any real difference in terms of developing choreography skills within the group. Constraints such as time and budget were mentioned by the group. The continuity of training and development opportunities were also mentioned as valuable mechanisms for developing professional career paths for carnival participants and in identifying possible alternative career choices among youth in areas such as costume design, float building and others related creative events and productions.

Recommendations by participants about how the carnival could leverage opportunities for participants to participate in the creative economy included:

- the setting up of an Academy for the inter-generational training in the making, maintenance and playing of indigenous music instruments, such as marimba;
- conducting skills audits within groups to reveal who could be used as ‘experts’ before appointing external experts for choreography and so on. This suggestion of scaling up the roles of group leaders and specialists was echoed across groups as a way of creating jobs, exposure and platforms for service provision in the arts; and
- using opportunities presented by the CTC for catalysing start-ups and co-operatives between organisations and individuals participating in the carnival¹².

With regard to the economic benefits that accrued to the carnival, this question was not easily answered as participants had no direct knowledge of the economic benefits accrued, or felt that they directly gained. One group observed that It was not clear whether they felt that this affected opportunities for economic enterprise and how it could be improved. Despite this cautionary note, discussions that emerged about the economic benefits were interpreted in two key ways. Firstly, as the benefits to the

¹² An example was given of collaboration between instrument makers (for export) and musicians such as marimba and dance groups (for performances such as busking) a priority of the City of Cape Town in terms of public art and in venues.

city generally, through revenue from tourism, and spending by locals, and secondly as the benefits that accrued to the participants themselves.

With regard to the first aspect, there was a perception that there was wealth generated for the city through increased tourism and that this trickled down, but the specifics of how that takes place and for whom was unclear to participants. Participants felt that not many of the visitors attached a visit to their communities before or after the carnival.

With regard to the local market, there was also some discussion that although the carnival may have appeared to be growing in recent years there was perhaps a decline in the number of spectators. At least one group attributed this in part to inadequate marketing in the communities where the groups are located. In particular the group indicated that taking posters home was not sufficient, there were no posters on the streets, and the distribution of marketing materials in these communities took place too late. An additional comment was that not having a set date for the carnival, such as the “second Saturday in March” prevented families in participants communities from planning ahead (and saving up) to attend the carnival. Participants were keen for more of their friends and family members to attend the carnival. The audience survey data supports the argument that very few spectators know anyone who is participating.

With regard to the second aspect, participants acknowledged that they benefited through having the work of their organisations and groups sponsored, and valued this provision by the CTC. However, the assumption that providing a platform for performance creates an opportunity for job creation or skills development needs to be more deeply interrogated. The instrumentalist nature of the assumption does not take into cognisance the social or economic contexts within which the creative sector operates in Cape Town and an understanding of some of the barriers to innovation and scaling up and skills development for creatives. There is a need to address the systemic issues which pervade the creative sector and opportunity loss through further action research with participant groups which should help to identify some of the interventions necessary in providing scaffolding between the event and job creation and economic empowerment. Collaboration between multiple partners such as BASA, the City of Cape Town, Department of Trade and Industry and NPOs such as Arterial Network SA, UCT and UWC would potentially lead to the transversal influence and partnerships required to create and maintain such infrastructure. Access to facilities and materials in creative and innovation hubs would be pivotal in nurturing and sustaining the experiential and development nature of the carnival process.

4.4 Recommendations for further research

A longer term study which integrates the monitoring and evaluation of social and economic benefits of the carnival that accrued to participating groups is needed to complement the study done on the impact on the City. This will require a baseline study to be done against existing and pre-existing skills sets, opportunity and mechanisms through which scaffolding between art and entrepreneurial activity at local level is manifest.

If the job-creation aspect is to be emphasised as an outcome, the need for longer term engagement of mentors and specialists to community groups needs to be explored for shifts from carnival focus to job

creation/opportunity recognition which is much longer term. Whilst participants were very positive about the role of the carnival organisation, they also raised discussion about wanting to assert their own visions and leadership in setting up collectives or collaborative projects as an output of the carnival. This needs to be carefully considered within the framework of what is realistic for the carnival organisation and how best to make the greatest impact in terms of the objectives of job creation and economic benefits with the smallest inputs/resources. This said, there is a need for greater transversal cooperation between structures within the city, such as the city's Arts and Culture branch, Business Arts South Africa, CCDI, mayoral and ward initiatives to maximise opportunities and scale up the benefits at local level.

The Cultural Mapping exercise of the City of Cape Town and its artists' database may be useful tools to interact with and find collaboration nodes which could ultimately benefit all parties, most of all participants as beneficiaries.

5 Summary and Conclusions

The Cape Town Carnival is an annual event that attracts a large number of spectators and participants each year. In 2017, the SA Cultural Observatory was asked to run a social and economic impact research project as part of the monitoring and evaluation function of the national Department of Arts and Culture.

Research methods included interviews with nearly 400 audience members on the night of the Carnival itself, a document review (previous annual reports), data sourced from organisers, and focus group discussions with community groups who participated in the Parade. The table below summarises the results.

The findings show that the CTC attracts a diverse audience in terms of age, race, income and education groups. As with festivals and events in any big city, most of the audience are local (87%). Most of the audience were South Africans (94%), with the largest groups coming from the Western Cape (30%), Gauteng (22%) and KwaZulu-Natal (29%).

Performers (participants in the Parade) also come from a range of race and age groups, and from 26 different suburbs in Cape Town. Focus group discussions highlighted the good facilitation of community participation and networking opportunities provided by organisers. There are high levels of trust between participants and organisers, with the Carnival seen as a collective achievement, rather than a competition. A longer-term study would be needed to identify the impact of the CTC experience on the skills development of participants, but there were opportunities for mentorship by professionals. Further research could explore ways of providing longer-term interventions to support transition from the event to job creation.

The average length of stay for visitors in Cape Town specifically to see the Carnival was 4.7 nights. Using data from the SA Domestic Tourism survey on average per person visitor spending in the Western Cape, net total visitor spending was calculated as R13.8m. Including organiser spending in the impact area (R8.7m) sourced from both sponsorship and earned income, the total economic impact of the 2017 Cape Town Carnival was R41.14m. This represents the amount of money that would have been lost to the City of Cape Town if the CTC had not taken place.

Table 10: Summary of Results

Theme	Indicators	Data
Audience Development & Education	Demographics (Age groups; Cultural/Race groups; Gender)	Women: 46%; Coloured: 57%; Black African: 21%; White: 16%; Under 20: 25%; 20-35:40%; 36-50:23%
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)	94% SA; 6% foreigners; SA Visitors – Western Cape: 30%; Gauteng: 22%; KZN: 19%
	Income and Education Groups	Had some tertiary education: 39%; Household income p/m <R5k: 25%; R5 – R15k: 34%; R15 – R30k: 24%; >R30k: 17%
	Participation & time-use	Not attended CTC before: 46%
	Participation (numbers)	Audience: 44 900; Parade participants: 1391
	Local residents vs Visitors	Cape Town Metro residents: 87%; Visitors 13% (5 837); 41% of visitors in CT mainly/only to attend CTC.
	Art form preferences	Music: 57%; Dance 31%; Festivals: 14%
Human Capital /Professional capacity building	Demographics of participants/performers	Mostly young: 47% < 18; 33% 18-35; 30% older than 35; Race groups: Coloured: 54%; Black African: 34%; Asian/Indian: 10%; White: 1%. From 26 Cape Town suburbs/areas
	Experience gained by participants/performers	Opportunities for mentorship by professionals; Informal networking and sharing of skills.
	Development of artistic quality	Longer term study needed to track skills development
	Showcasing South African art and artists	Wide variety of genres enabled by inclusive theme
Inclusive Economic Growth	Organiser spending	R8.9m spent locally (including that funded by non-local sponsors and earned income)
	Earned income/Turnover	R605 500
	Sponsors	DAC; Oshri (New York); DStv; Tsogo Sun Hotels; Business Arts SA; National Lotteries Commission; City of CT; Naspers; MNET; W. Cape Dept of Premier; W.Cape DCAS – EPWP; WESGRO; W. Cape DCAS
	Audience spending	R13.8m
	Average Length of stay (Bed nights) for visitors in CT	4.7
	Economic impact of “new” money spent in CT as a direct result of the CTC	R41.14m
Social Cohesion & Community Development	Artist/Producer demographics (diversity)	Significant diversity (all race groups represented); focus on younger participants.
	Audience diversity	Significant diversity (all race groups represented, 65% <35 years old); 87% from Cape Town; 54% attendee CTC before.
	Audience opinions	80% rated “atmosphere, energy and vibe” “great”; 81% rated “diversity of cultures represented “great”
	Artist/producer opinions	High degree of trust between organisers and participants; opportunities for participants to network; intercultural exchange.

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7 Appendix 1: Data Tables

Indicator	Categories	Percentage
Gender	Women	46%
	Men	54%
Age Groups	Under 20	25%
	20-35	40%
	36-50	23%
	>50	12%
Population Groups	Indian/Asian	4%
	Black African	21%
	Coloured	57%
	White	16%
	Unsure	2%
Disability	Disabled	5%

Indicator	Categories	Percentage
Home Language	English	66%
	Afrikaans	15%
	isiXhosa	9%
	Other South African	3%
	Other	7%
Education	School	24%
	Matric	37%
	College	16%
	Diploma/Degree	23%
HH Income	<R5000	25%
	R5001-R10 000	19%
	R10 001-R15 000	15%
	R15 001- R20 000	15%
	R20 001-R30 000	9%
	R30 0001-R40 000	6%
	>R40 000	11%
Personal Income	<R5000	41%
	R5001-R10 000	20%
	R10 001-R15 000	12%
	R15 001- R20 000	9%
	R20 001-R30 000	7%
	R30 0001-R40 000	3%
	>R40 000	7%

Province: Non Local South Africans	
Western Cape	30%
Gauteng	22%
KwaZulu-Natal	19%
Limpopo	11%
Free State	7%
Northern Cape	7%
Eastern Cape	4%

Opinions		Locals	Visitors	All
Floats	Great	72%	71%	71%
	Could be better	11%	11%	11%
	Unsure	5%	9%	6%
	Too early to say	12%	9%	12%
Costumes	Great	70%	70%	70%
	Could be better	15%	16%	15%
	Unsure	5%	7%	5%
	Too early to say	10%	7%	10%

Opinions		Locals	Visitors	All
Group Performers	Great	65%	69%	66%
	Could be better	17%	14%	17%
	Unsure	6%	7%	6%
	Too early to say	12%	10%	11%
Individual Performers	Great	66%	62%	65%
	Could be better	13%	20%	14%
	Unsure	8%	9%	8%
	Too early to say	13%	9%	13%

Opinions		Locals	Visitors	All
Atmosphere	Great	80%	80%	80%
	Could be better	12%	9%	12%
	Unsure	5%	7%	5%
	Too early to say	3%	4%	3%
Cultural Diversity	Great	81%	82%	81%
	Could be better	9%	5%	9%
	Unsure	5%	9%	5%
	Too early to say	5%	4%	5%
Safety	Great	79%	77%	79%
	Could be better	13%	5%	12%
	Unsure	5%	14%	6%
	Too early to say	3%	4%	3%

Overall Ratings	Carnival		World Class	Good for SA	Needs improvement
Visitors & Locals	Visitors		33%	59%	8%
	Locals		41%	44%	15%
	All		40%	46%	14%
Population Groups	Indian/Asian		29%	71%	0%
	Black African		53%	39%	8%
	Coloured		34%	47%	19%
	White		50%	41%	9%
Age Groups	Under 20		35%	51%	14%
	20-35		40%	47%	13%
	36-50		44%	38%	18%
	>50		43%	50%	7%

Atmosphere		Great	Could be better	Unsure/Too early to say
All	All	80%	12%	8%
Age Group	Under 20	78%	17%	5%
	20-35	76%	15%	9%
	36-50	83%	8%	9%
	>50	95%	0%	5%
Population Groups	Indian/Asian	92%	0%	8%
	Black African	79%	13%	8%
	Coloured	80%	13%	7%
	White	83%	9%	8%

Cultural Diversity		Great	Could be better	Unsure/Too early to say
All	All	81%	9%	10%
Age Group	Under 20	87%	8%	5%
	20-35	79%	8%	13%
	36-50	74%	14%	12%
	>50	93%	2%	5%
Population Groups	Indian/Asian	79%	14%	7%
	Black African	84%	6%	10%
	Coloured	80%	9%	11%
	White	75%	0%	25%

Favourite Art Forms	Percentage %
Music	57%
Dance	31%

Festivals	14%
Drama & Theatre	9%
Film	8%
Art Galleries	5%
Poetry & Spoken Word	4%
Other	4%
Museums	1%
Favourite Music	
Contemporary	66%
Jazz	33%
Classical	11%
Musicals	5%
Opera	5%
Choral	2%
Favourite Dance	
Contemporary	58%
Traditional	26%
Classical	16%

*Note that since respondents could choose more than one option, totals sometimes add up to more than 100%.

Hear about CTC	Percentage*
Word of mouth	43%
Facebook	18%
Radio	12%
Posters	10%
DSTV	7%
Newspapers	6%
Other	5%
Website	4%
Flyers	2%
TV	1%
Event Guide	1%
Magazines	1%
Newsletter	1%

*Note that since respondents could choose more than one option, totals sometimes add up to more than 100%.

Origin of CTC Parade Participants (sourced from organiser data)

CT Suburb	Frequency	Percent
Athlone	257	18.5
Mitchell's Plain	145	10.4
Gugulethu	126	9.1
Kraaifontein	98	7.0
Observatory	96	6.9
Langa	86	6.2
Muizenberg	82	5.9
Khayelitsha	63	4.5
Steenberg	48	3.5
Hout Bay	39	2.8
Bloekombos	37	2.7
Heideveld	32	2.3
Strandfontein	32	2.3
Someset West	29	2.1
Mannenberg	25	1.8
Atlantis	24	1.7
Phillipi	24	1.7
Belhar	20	1.4
Crossroads	20	1.4
Cape Town	19	1.4
	18	1.3
Plumstead	17	1.2
Bellville	16	1.2
Ocean View	14	1.0
Simonstown	14	1.0
Ottery	10	0.7
Total	1391	100.0

8 Appendix 2: Focus Group discussion

8.1 Questions for FGDs

Introduction: Thank you very much for agreeing to come and share your experiences of the 2017 Cape Town Carnival with us! An independent company, SADC Research, in partnership with the SA Cultural Observatory, is conducting this research, which is funded by the Department of Arts and Culture. The organisers of the Carnival know about the research and will have access to the results.

The *purpose* of the research is to find out what you thought the Carnival did well, and maybe to get some ideas on how things could be done differently in the future.

Please remember that, in joining in, you don't have to answer any questions that you don't want to, and that your *names won't be connected to the results*. There are no right or wrong answers – this is about your thoughts and opinions.

1. One of the aims of the Cape Town Carnival is to represent and celebrate the **cultural diversity** of Cape Town and South Africa.
 - a. How do you think the Cape Town Carnival does this?
 - b. What could be changed or added to make it more diverse and representative?
2. Another aim of the Cape Town Carnival is to build social connections, networks and intercultural understanding (sometimes called **social cohesion**).
 - a. Do you think that the Cape Town Carnival manages to do this? Why or why not?
 - b. In your opinion, what could be done to help reach this goal?
3. The Cape Town Carnival aims to provide opportunities for **creative people**, like dancers, actors, designers, artists and costume makers, to **showcase** their work.
 - a. Do you think that it does this successfully?
 - b. Do you think that participation in the Cape Town Carnival helps people working in the creative sector in Cape Town to get jobs or sell their products?
-
4. The Cape Town Carnival aims to benefit everyone in the city through helping to attract visitors who spend money on accommodation, food and drinks, shopping and so on.
 - a. Do you think that people in Cape Town **benefit economically** from visitors who come to the Carnival?
5. Finally, if you had to rate your **overall Cape Town Carnival experience** this year on a scale from 1 to 10, where 1 means poor and 10 means fantastic, what would you give it? Why?

8.2 Focus Group Discussion Themes

Question 1: Cultural Diversity
(a)How do you think the CT Carnival does this?
By having different types/cultural groups participate in the carnival.
BBT meetings where group leaders get to know each other and develop healthy relationships
The carnival team is a very open group that works to improve the carnival each year to make sure that it includes as many participants as possible, including as many cultures as possible
CT Carnival team reaches out to all the communities of Cape Town regardless of location or economic status, mixing old and new groups.
Very good cooperation between carnival management and groups
Participation of more groups such as the Chinese makes a huge difference
By reaching out to communities that do not have a way of being seen or noticed
By advertising through the media, as well as visiting the different youth groups and making sure that everybody works together as one
By providing a platform such as the carnival to showcase all cultures and their displays
By bringing the different cultures together to show what it's like to have all these cultures around you
Through creativity strips away difference and removes barriers
The annually changing themes which relate and celebrate the spirit of cultural diversity
BBT workshops conducted before the carnival and meets the needs of groups
Managed by an extremely talented and creative team who create a family environment
The CTC Management spirit of inclusion is great
Openness to all cultures in Cape Town
The themes chosen for the CTC act as a link

(b)What could be added to make it more diverse and representative
Parade closure at the stadium.
After party is not for everyone –change that
Marketing and transport for audiences
Longer route and end in the stadium
Greater continuity with more events throughout the year
Add more of the different cultures that SA holds and that a lot of the people don't know
Conduct a survey of all the cultures in Cape Town and invite them all.
During the parade have an announcer to introduce the cultures as they parade past
Making the stretch of the carnival longer, having more than one carnival per year and also having more time to interact with groups more often
Adding more themes in one march
More research needs to go into finding people
Sustain the ways in which CT Carnival has engaged with organisations and groups like they have been doing for years
Take CTC to the communities from which groups come
4 groups performing in one school
Increasing scouting measures into rural areas

Question 2: Social Cohesion
(a) Do you think that CT Carnival manages to achieve this? Why/Why not?
Yes, in the BBT we get to interact with people of all cultures and ages and the carnival also assists each group with information and sponsors that can help them individually
Leaving participants to mingle before the carnival parade begins
Lends costumes to needy groups when needed
Offers contacts and cover letter of introduction
We all come together with a common goal and embracing diversity
They make it possible for you to interact with different types of people and make it easy for you to make a connection with these people
Definitely, we meet groups from different cultures for the first time. Many we didn't know existed before
Back of house – teams and groups come together and actually meet and speak to people of different cultures or youth groups and learn about them
CTC facilitates groups meeting and getting to know each other

Because everyone is involved in making event a success
Builds lifetime friendships through BBT meetings and on day of the carnival
Availability of resources
The absence of competition makes the work of cohesion easier
Expectations were raised when prizes and prize giving was introduced – eliminate the prizes
(b) What (more) could be done to achieve this goal?
More events between participants
Organise more pre-parade and after-parade get togethers
Collaboration between groups on creative projects
Use social networking to stay in contact and have more get togethers for participants
Create more platforms for parade, particularly in areas which cannot access the city parade
Taking carnival to different regions before the main one
Connect through social media, TV channels, magazines and newspapers
Groups could take responsibility and invite each other to do events together outside of the CTC
Greater coverage of participant groups through documentary and television coverage
Stadium performances
Create greater sustainability among groups
Growing publicity
Doing carnival in different regions
Organise a formal debrief
Create an accessible database about each groups repertoire
Under representation from white communities
Include communities that bridge between geographical divide and who have a particular culture such as; skateboarders and integrate them into the parade

Question 3: Opportunities for Creatives & Showcasing Work
3a) Do you think that it is done successfully?
CTC creates opportunities through costume design, float building and so on
The celebration of the carnival is a celebration for Creativity and Creative people
The invited choreographers train some of the dancers
There is continuity of training and development i.t.o float and costume designs
3b) Do you think that participation creates jobs/helps market products?
The creation of the design theme to work towards and the appointment of specialists to assist. More can be done though to provide training opportunities, longer term studies and career development and marketing
Create an Academy for indigenous instruments such as marimba
Using skills from within groups before appointment of external trainers
Facilitate groups starting up co-operatives
There is a huge influx of tourists during that period. The date has become important

Question 4: Economic benefits to Cape Town
Do you think people of Cape Town benefit economically and how?
Yes
More monies come into the city through visitors and this money is then allocated to city citizens
To a certain extent
It differs according to products sold
It's a once-off benefit
There are collaboration opportunities
There is a relationship to trade
Sustainability needs more work
Cannot say as they do not see impact – they simply perform. From their communities they come as audiences, buy supper and have fun. Can act as ambassadors for advertising CTC at local level
Different cultures meeting has value
All sectors of tourism benefit
There are job opportunities and skills development
Marketing happens too late

Question 5: How would you rate your overall experience of CTC 2017 and why?
--

7/10, there was bad lighting in some parts of the parade. Food provided to participants can be improved. End of the parade an anti-climax
8-9/10
There is always room for improvement
There are a number of stressors
Better than 2016
Drinks and water at back of house
Well done to management
6/10. No one is perfect and "we are all in this journey to make it work together"
The younger ones are not kept busy in the process while waiting for long hours
Some hiccups are not communicated while parade is in progress
Budget is also a problem
Transport after hours, particularly for children needs to be more carefully planned with safety and security in mind
8/10 overall Carnival listened and meets requirements. Room for improvement