Live Music Audiences
Johannesburg (Gauteng) South Africa
Live Music and Audience Development

The role and practice of arts marketing has evolved over the last decade from being regarded as subsidiary to a vital function of any arts and cultural organisation. Many organisations have now placed the audience at the heart of their operation, becoming artistically-led, but audience-focused. Artistically-led, audience-focused organisations segment their audiences into target groups by their needs, motivations and attitudes, rather than purely their physical and demographic attributes. Finally, they adapt the audience experience and marketing approach for each target group.

Within the arts marketing profession and wider arts and culture sector, a new Anglo-American led field has emerged, called audience development. While the definition of audience development may differ among academics, it’s essentially about:

- understanding your audiences through research;
- becoming more audience-focused (or customer-centred); and
- seeking new audiences through short and long-term strategies.

This report investigates what importance South Africa places on arts marketing and audiences as well as their current understanding of, and appetite for, audience development. It also acts as a roadmap, signposting you to how the different aspects of the research can be used by arts and cultural organisations to understand and grow their audiences.

While audience development is the central focus of this study, it has been located within the live music scene in Johannesburg and wider Gauteng. Emphasis is also placed on young audiences as they represent a large existing, and important potential, audience for the live music and wider arts sector.

The study was a joint project with researcher Elizabeth O’Connor, the University of Witwatersrand and Concerts SA. Please see the appendix or the further information about the partners.

Thank you to the people who gave their time and honesty in the research of this project. It is hoped this study is just the first step, which will inspire more artists and organisations to get to know their audiences better.
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1. Research Background

Today live music plays a critical role in South Africa’s wider music landscape, and has attracted renewed interest from the local and international music industry as they seek out new forms of revenue following the decline in recorded music sales. Spending on live music was expected to overtake spending on recorded music in 2014, and by 2018 live music is expected to account for 67% of consumer spending on music in South Africa. Johannesburg has been chosen as the focus of this research due to its established live music scene with Gauteng province being home to most of the live music venues alongside the Western Cape. Furthermore, the city has a rich music heritage associated with venues, and continues to be regarded as an influential hotbed of emerging South African youth culture.

Audience access to live music in South Africa is limited and unequally distributed with the majority of festivals and venues located in metropolitan centres and tourism areas. Johannesburg is historically significant for its iconic music venues which were instrumental in the early growth of the post-apartheid South African live music scene. In addition to Johannesburg’s live music heritage, the city was the focus of this research project due to its established live music scene with permanent and recurring live music activity. It’s also important to note that while this study concentrated on venues with consistent programming, there is a market for live music in Johannesburg in informal venues such as bars and restaurants as well as at festivals.

A focus has been placed on young audiences as South Africa has one of the youngest populations in the world, with an average age of 24.9 years and almost 30% of the population aged between 15 and 34 years. Johannesburg’s demographics follow this trend with 40% of its population under 25 years old. It is important to highlight at the outset of this report, that definitions of youth in South Africa are diverse with research using a multitude of age brackets for their studies. This could be explained by government’s use of broad classifications of youth in post-apartheid public policies. They have largely defined youth as people between the ages of 14 to 35 years. The qualitative aspect of study focused on 18-to-25-year-olds as young people who are just starting their adult lives with some disposable income and independence from their family. They may have just completed matric and started university or entered the workforce. However, they may also be unemployed and still relying on family support due to South Africa’s high youth unemployment rate of 36%.

The youth represent a large existing and important potential audience for the live music sector. For example, the South African Student Spend Report 2014 of 18-to-24-year-old students indicated that they’re spending approximately R450 per month on music and entertainment, putting it alongside petrol, food, health, technology and clothes as their largest monthly expense. Furthermore, of the one-third of student respondents who said they shopped online, 40% said they purchased concert tickets and music, which represented the largest spend of all items purchased online. While there is general information available about youth spending behaviour in South Africa, there is very limited research into how and why young South Africans consume live music.

Despite having a vibrant live music scene in South Africa, the 2013 Songlines: Mapping the South African Live Performance Landscape report indicated that audience research remains extremely limited in the sector and argued that it should be a priority going forward. Furthermore, the
2008 Gauteng Creative Mapping Project: Mapping the creative industries in Gauteng report highlighted that more than half of all organisations in the Gauteng creative industries felt they needed help with their audience development and marketing\textsuperscript{xv}. While the sector has articulated a clear need for increased audience research and marketing skills development, there is still limited practice across the sector in South Africa. Therefore, in addition to studying 18-to-25-year-old live music venue audiences, the research aimed to uncover the level of knowledge and practice of audience research and development by live music venues.

A key component of this study was investigating the motivations for, and barriers to, audiences attending and consuming live music in venues. Looking at new ways of segmenting South African arts and culture audiences could help inform future audience development strategies in South Africa. The research attempted to answer two key research questions.

1. What are the motivations for, and barriers to, audiences attending and consuming live music in Johannesburg (Gauteng) venues?

2. What is the level of understanding and practice of audience development among Johannesburg (Gauteng) live music venues?

Finally, the report reflects on the findings and makes recommendations on how live music venues could authentically engage with audiences as well as what measures could be taken to cultivate more artistically-led, but audience-focused venues.

1.1 The Local Context

1.1.1 A Brief Post-Apartheid History of Live Music Venues in Johannesburg

Coplan’s \textsuperscript{xvi} second edition of In Township Tonight argues that the South African live music scene was transformed in the 1990s with the abolition of apartheid and the return of the exiled recognised musicians helped establish a professional live music industry at home and abroad. However, Ansell’s \textsuperscript{xvii} Soweto Blues: Jazz, Popular Music and Politics in South Africa suggests that arts and culture was only one aspect of a huge legacy of unequal development and provision which required action. The post-apartheid government had to establish new arts funding and policy bodies, an arts education curriculum and mechanisms to professionalise the industry. She adds that South Africa had also re-emerged to the world, ending decades of isolation, censorship and cultural boycott, which opened up opportunities to consume music from around the world as well as to export its own cultural products and expression\textsuperscript{xviii}.

De-segregated live music venues, previously limited to counter-culture spaces, began to flourish in Johannesburg in the 1990s. New venues such as Bassline (originally based in Melville and now located in Newtown), Rumours and Sof’town expanded the live music circuit in Johannesburg providing alternatives to the already established jazz venue, Kippies\textsuperscript{xx}. Coplan argues that venues such as Kippies were not only critical in providing spaces for performing artists to meet and perform, they helped to cultivate uniquely South African music genres and culture\textsuperscript{xx}. Other platforms for live music began to appear alongside venues including some of the large-scale festivals that are still running today such as Joy of Jazz, Grahamstown National Arts Festival and
Cape Town North Sea Jazz Festival (now the Cape Town International Jazz Festival) sustained the live music venue circuit in Johannesburg proved challenging in the 2000s with local audiences not having the level of disposable income needed to support a thriving live music scene, prompting the closure of some venues including Sof'town and the iconic Kippies.

As we move to the current context, South Africa’s live music market looks strong and was expected to overtake recorded music by 2014. Price Waterhouse Coopers forecast that by 2018, live music will account for 67% of consumer spending on music in South Africa; physical unit sales will decrease at a Compound Annual Growth Rate (CAGR) of almost 9% between 2014 and 2018; and consumer spend on digital music units will rise at a CAGR of 18% in the next five years. Business and Arts South Africa (BASA) is an organisation which promotes mutually-beneficial business-art relationships who produces a bi-annual national arts audience report. The BASA Artstrack No. 6 report found in 2013 that significant numbers of adult South Africans are passionate about music (70% of respondents), however frequency of attendance at live music performances is not as strong as the industry requires. Around one third of BASA Artstrack No. 6 respondents attended live music reasonably often to very often, compared with over 50% which attended now and then to seldom. This lack of regular attendance can also be seen with South Africa’s passion for sport, which while respondents nominate sport as one of their major passions, attendance at games is low with only 9% of followers attending games. There could be a number of reasons to explain this trend which will be explored within this study, however key considerations would have to be South African’s limited disposable income as well as lack of accessible transport.

The BASA Artstrack No. 6 report found that in 2013 younger audiences attended live music more frequently than older people with people under the age of 25 years attending reasonably to very often. This finding is important to this study’s objective of better understanding young audiences, as it reiterates the potential of young people to live music venues looking to grow their audiences. The report also explored audience motivation for, and consumption patterns at, live music events for the first time, finding that what contributes most to people having a lifetime experience at a live music event are the atmosphere, enjoying the music and the performance, crowd interaction and the spiritual feeling the show creates.

1.1.2 Live Music Industry, Venues and Audiences in Johannesburg – Existing Research

Before undertaking this study, it was important to map the current research and literature about the live music sector and its audiences to build upon for this research. There were a number of recent studies which have contributed to the knowledge base of the live music landscape in South Africa and Johannesburg. Early studies included the 1988 South African Music Industry, 1998 Creative South Africa followed by two industry reports by KPMG in 1999 and 2001.

Commissioned by the provincial Department of Sports, Arts, Culture and Recreation, the 2008 Gauteng Creative Mapping Project quantified the contribution creative industries made to the Gauteng economy. While the study provided some detailed information about the music industry at an organisation-level, there wasn’t a specific focus on live music venues and audiences.

In 2010, the National Arts Council of South Africa published Public participation in the arts survey, a nationwide survey of the public’s participation in arts and culture including live music. The survey did explore audience appreciation and barriers to attendance, however it hasn’t
been conducted since xxx. In 2011 the Department of Labour released a labour market review of the creative industries, *Labour Market Review: An investigation into the nature of the employment relationships in the South African creative industry*, however only two of the fifty interviewees who informed the music sector research were venue owners xxx.

The *Price Waterhouse Coopers (PwC) entertainment and media outlook: 2014 - 2018 South Africa - Nigeria – Kenya* offers a nation-wide quantitative analysis of the entertainment and media industry. The report indicates industry trends and forecasts, however it doesn’t present the information on a provincial or city-based level and provides limited analysis on the findings xxxi. South African Music Rights Organisation’s (SAMRO) annual reports are another source of data for measuring the strength of music industry, reporting on the level of performing, mechanical and needle time rights xxxii.

Business and Arts South Africa’s bi-annual survey *Artstrack* has already been introduced in the report, however it provides insight into arts audiences’ attitudes and participation levels. Previous reports have neglected to include live music as a category when measuring audience interest in the different art genres xxxiii, however the 2013 *Artstrack No. 6 report* had a much greater focus on live music audiences including attendance frequency, motivation and consumption patterns xxxiv.

The most recent research that attempts to map the live music landscape at provincial and city level is the Moshito Music Conference and Exhibition’s *2010 Mapping of the South African Live Music Circuit* followed, and extended, by Concerts South Africa’s (Concerts SA) 2013 *Songlines: Mapping the South African Live Performance Landscape* report. The 2013 report was based on a survey of a wide range of live music venues in Johannesburg, Cape Town and Durban. It captured information about the provincial distribution of performance opportunities, genres supported by venues, venue capacity and frequency of live music among other information, however it acknowledged a need for additional research to broaden and deepen understanding of how live music audiences think and behave xxxv.

### 1.2 Arts Marketing

Much of the global academic literature and research around arts marketing and audience development is written from a Global North perspective, however it is important to provide an overview of this literature as it underpins this study. Academics Hayes and Roodhouse propose that arts marketing has evolved in the Global North from being regarded as ancillary, in the largely subsidised arts and cultural sector, to becoming a strategic function, as organisations sought out new entrepreneurial models following the global decline of state funding xxxvi.

Fellow academic, Rentschler, introduced the following evolutionary framework for the arts marketing profession which saw it progress:

- from the *foundation period (1975 – 84)* where arts institutions began to see the importance of marketing to their sector; to the
- *professionalization period (1985 – 94)* where specialist expertise and marketing departments became more widely established; to the
• **discovery period (1995 – 2000)** where marketing orientation embedded itself into organisations; and finally the
• **innovation period (2000 – onwards)** where there is a greater need to understand audiences, prompting the emergence of a new concept - audience development xxxvii.

This evolution of the arts marketing profession is highlighted to demonstrate that it is a relatively new Anglo-American led field, and this study explores where South Africa’s arts marketing practice currently sits in terms of Rentschler’s evolutionary framework to more accurately position the local context.

Rentschler claims that the arts management and marketing field of study emerged in the 1970s and a sign of its maturity has been the increasing number of academic studies and resulting publications on the subject xxxviii. Fillis supports Rentchler’s view that arts marketing research has developed in terms of rigour and depth, however he acknowledges that there is still much unexplored potential to be realised xxxix. This point is particularly relevant for this study, which is located in Africa, where there has been extremely limited research and scholarship dedicated to arts marketing.

Fillis adds that a contemporary interpretation of arts marketing defines the field as a dedicated area of scholarship, however acknowledges its foundations in broader marketing theory. This is also true of this study which borrows from traditional marketing theories such as consumer behaviour and Maslow’s Hierarchy of Needs.

Recent arts marketing research and scholarship have concentrated on a number of different focus areas including audience motivation and development, as well as consumer behaviour xl. Boorsma and Chiaravalloti argue that as the field of arts marketing matured, a relational view of art as experience has emerged, positioning arts consumers as central to the artistic mission of arts organisations. This more central role audiences play in a live music or arts experience was introduced earlier in the report when describing organisations as artistically-led, but audience-focused. Boorsma and Chiaravalloti add that this relational view of audience and art experience, has presented new area of focus for arts marketing practice and academia – audience development xli.

1.3 Audience Development

Literature on developing new audiences for the arts is written from a range of perspectives, however in recent years much effort has been dedicated to arts marketing literature based on social science research with a grounding in studying human behaviour and motivation. The majority of these studies have been based in the Global North and dedicated to audience development xlii. This study contributes to this field of study and is one of the first of its kind to be located in Africa.

There is no commonly agreed definition of audience development, however Maitland defines it as a ‘planned process that involves the whole organisation in broadening and deepening an individual’s engagement with the arts’ xliii. Rogers maintains that audience development is a holistic and integrative activity xliv, a view that Maitland supports in arguing that arts and cultural institutions must be artistically-led but audience-focused. By adopting this approach, institutions
strive to understand their audiences’ needs and motivations, and attempt to fulfil them in order to achieve the institution’s own objectives. Furthermore, artistically-led but audience-focused organisations segment their audiences into target groups by their needs, motivations and attitudes. Finally, they adapt the audience experience and marketing approach for each group. This study has used Maitland’s grid to map where the case study venues’ currently sit in terms of their level of audience-focus.

Figure 1 Maitland’s Audience Grid

There are a number of models of audience development which arts and cultural organisations can use to frame their audience strategy. This research paper is based on the most recent thinking in audience development, which champions the use of psychographics (the study and classification of people according to their attitudes, aspirations and other psychological criteria) in segmenting arts audiences to understand motivations for attendance. An earlier motivation-led audience development model, the RAND participation model, was developed by McCarthy and Jinnett on behalf of the US-based Wallace Foundation in 2001. The model offers a framework for understanding arts participation by looking at behaviours which identify the main factors influencing individual decisions about the arts. The model rests on the premise that an individual’s decision to participate in the arts involves separate stages or decisions, and different factors such as socioeconomic, personality characteristics, prior experiences, and identification with a specific community, influence each of these stages.
A more recent motivation-led audience development model emerged from extensive research in the United Kingdom by consultants Morris Hargreaves McIntyre. Their model is based on a hierarchy of visitor engagement which reflects Maslow’s 1943 *Hierarchy of Needs* theory. Maslow’s theory suggests that human behaviour and decision-making are motivated by one of the five need levels in his hierarchy: physiological, safety, social, esteem and self-actualisation.

Morris Hargreaves McIntyre apply Maslow’s model in order to understand arts audiences’ needs. For example, audiences may attend the arts to fulfil:

- a *social need* – they want social interaction, entertainment, to feel included or warmth and security;
- an *intellectual need* – academic or professional interest, hobby interest, self-improvement or stimulate children;
- an *emotional need* - aesthetic pleasure, awe/wonder, personal relevance, connect to past or sense of cultural identity; and finally
- a *spiritual need* - escapism, contemplation or stimulate creativity.
There have been localised interpretations of motivation-based audience development such as the Arts Council England (ACE) 2011 audience segmentation model – *Arts Audiences: Insight 2011*. ACE states that one of Insight’s objectives is ‘to gain a better understanding of the motivations and behaviours of different audience groups, including both those who are already active in the arts and those who currently have little or no engagement.’ The ACE model combines demographics such as age and education with psychographics to categorise their audience segments. This study used the motivation-led *Morris, Hargreaves and McIntyre Audience Development Model* as a reference when analysing the youth audience motivation findings.
Like the ACE model, this study supplemented psychographics with demographic measures based on the widely used South African marketing research tool – South African Audience Research Foundation Living Standards Measure (SAARF LSM). In addition to using standard international demographic measures such as age, ethnicity and sex, SAARF LSM segments South Africa people according to their living standards using criteria such as degree of urbanisation and ownership of cars and major appliances. South Africa’s marketing and insight agencies have also introduced new tools to more accurately segment South Africa’s population. An example of this would be New Urban Tribes of South Africa, by Flux Trends’ Dion Chang which identifies twelve distinct new urban tribes contributing to South Africa’s economy. Chang’s Urban Tribes looks at what drives, motivates and fulfils them among other characteristics. Using a localised research tool, such as SAARF LSM, alongside a UK-led audience model helped to give the findings local relevance.

As alluded to earlier, audience development is a very new field with limited literature and research available on the subject in South Africa. This study not only contributes to the wider field of study, it examines the extent to which motivation-based audience development is understood and used by South African arts practitioners as well as its relevance and validity to a Global South setting.
1.4 Live Music Consumption and Experience

Now that we have established that arts consumers have become more central to arts organisations, greater knowledge is required by arts organisations about the consumer behavioural loyalty of their audiences, particularly in terms of choice behaviour across venues, art forms or live music genres. With this in mind, this study not only explores what motivates audiences to attend live music, but also what type of experience they are looking for at live music venues.

Hedonic consumption first appeared in consumer behaviour theory by Hirschman and Holbrook in 1982 and can be defined as those facets of consumer behaviour that relate to the multi-sensory, fantasy and emotive aspects on one’s experience with products or services. They argue that consumption is more than purely satisfying needs and wants but can evoke expressions of strong emotions such as love and hate or hope and regret. Experiential consumption appears to be a term used interchangeably with hedonic consumption by Holbrook and Hirschman. They define it as ‘phenomenological in spirit and consumption is regarded as a subjective state of mind with a variety of symbolic meanings, hedonic responses and esthetical criteria.’ By looking at this model of consumption, you can see alignment with Morris Hargreaves McIntyre’s Audience Development Model, which highlights audiences’ motivation to attend the arts to fulfil social, intellectual, emotional or spiritual needs.

Vargo and Lusch reignited interest in arts consumption in their positioning of the audience as central to value-creation. The audience determines value and participates in creating it through the process of co-production with the artists. In arts marketing terms, the audience is no longer merely presented with an experience that the artist or arts institution assigns value to. Rather artists and institutions adopt a service-centred approach by engaging in short or long term relationships with audiences that are more important than the one-off arts experience itself. Once again, there is alignment of thought between Vargo and Lusch’s service-centred approach with Maitland’s artistically-led audience-focused approach mentioned earlier. Osborne and Rentschler advanced this idea exploring relationship development in their 2011 article Conversation, Collaboration and Cooperation: Courting New Audiences for a New Century. They suggest that arts organisations must collaborate and cooperate with their audiences to ensure they are meeting their expectations and needs. Furthermore, Osborne and Rentschler argue that authenticity is a vital ingredient in relationship development ‘an authentic arts experience engages the audience with the work; it does so by developing product (arts experience) which recognises the identity of the audience and is sincere in its approach.’ This clearly illustrates how interrelated all aspects of the experience are to the audience, from the initial marketing to the performance and, finally, to the level of customer service they receive at the venue.

In addition to understanding the motivations for audiences attending live music venues, this study investigates how audiences consume the live music experience exploring the experiential consumption theory. This exploration sought to understand the type of experience live music venues must provide to their audiences to ensure authenticity and encourage loyalty.

It is important to note, that this study is informed by the broader field of arts marketing and consumption, which might be interpreted by some as commoditising the arts. It is acknowledged that this perspective is focused and doesn’t address broader definitions of culture.
‘as a way of life’ or as an individual pursuit not linked with audience or public consumption\textsuperscript{lxvi}. The role of arts and culture, as separate from consumption, in South Africa is recognised as important in addressing the cultural legacies of apartheid such as the protection and celebration of traditional languages, dress, music and craft. The South African live music scene is diverse, however this study is focused on the relationship between live music and audience.

1.5 Barriers to Attendance

This study examines the barriers to audiences attending live music venues in Johannesburg and wider Gauteng. Understanding to what extent physical barriers, such as lack of transport and limited disposable income, are impacting attendance levels at live music venues could provide vital information that assists venues adapt their audience experience from pricing structure and timing, to customer service\textsuperscript{lxvii}. However, understanding psychological barriers to attendance is crucial in the South African context which is still affected by the spatial and racial legacies of apartheid. The 2013 \textit{Songlines: Mapping the South African Live Performance Landscape} report observed that while there is evidence of racially-diverse artist line-ups at venues and festivals in South Africa, live music audiences are still largely racially-aligned\textsuperscript{lxviii}.

Sandell and Dodd, from the Research Centre for Museums and Galleries at the University of Leicester are leading figures in the United Kingdom in the field of museum audiences. Their research has focused on barriers to attendance at museums and galleries. They have developed a model which categorises the different types of barriers to arts attendance.

- \textit{Institutional} – the barriers that venues and their owners and staff intentionally or unintentionally create to discourage certain sections of the community. These could include inappropriate front-of-house staff behaviour, restrictive opening house, pricing that disadvantages people with low income.
- \textit{Personal and social} – possible causes of social exclusion can be the result of cultural or community circumstances. In South Africa, these barriers are largely linked to the racial and spatial legacies of apartheid.
- \textit{Perceptions and awareness} - a perception that this venue or genre of music is ‘not for us’ mentality. This could be experienced by a minority community, people who feel there is limited relevance to their life or perhaps people who just lack knowledge of the venue.
- \textit{Environmental} – these are physical barriers which restrict access such as lack of transport links or lack of security\textsuperscript{lxix}.

This study explores the degree to which spatial and racial legacies of apartheid still influence barriers to live music attendance by using Dodd and Sandell’s categories\textsuperscript{lxix}.

2. Methodology

This report was produced through a partnership between researcher Elizabeth O’Connor, the University of Witwatersrand and Concerts SA (see the appendix for the further information about the partners). The initial Masters’ \textit{Johannesburg Live Music Audiences: Motivations for, and barriers to, 18-to-25 year-old audiences attending and consuming live music in Johannesburg venues} is a research report submitted by Elizabeth O’Connor to the Wits School of the Arts, University of Witwatersrand in partial fulfilment of a Degree of Masters of Arts. Concerts SA and
the University of Witwatersrand then commissioned Elizabeth O’Connor, to conduct supplementary research in response to the recommendations outlined in the *Songlines* report.

The Masters’ research provides:

- a focus on four core Johannesburg live music venues – Afrikan Freedom Station, The Orbit, Soweto Theatre and Niki’s Oasis;
- a series of in-depth interviews with young people, aged 18 to 25 years, who have attended one of those venues. The interviews explore their motivation to attend live music, consumption and experience expectations as well barriers to attendance. In addition some demographic data has been collected from the young people;
- a series of in-depth interviews with the case study venue owners and staff responsible for marketing and audience development. These interviews explore knowledge and practice of audience development by the venues; and
- observation was undertaken at each of the case study venues to qualify some of the insights to emerge from the in-depth interviews.

The Concerts SA extended research focuses on:

- widening the case studies to include their network of supported live music venues in Gauteng including Lucky Bean (Melville), Da Venue (KwaThema), Lahliwe’s (Khutsong) and Iketleng (Vereeniging);
- a series of in-depth interviews with the case study venue owners which explore knowledge and practice of audience development by the venues;
- a quantitative online survey (conducted from November 2014 to March 2015) which aims to understand the network of Concerts SA-supported venues’ live music audiences. The survey was broadened to all audiences and looked to understand motivation to attend live music, consumption and experience expectations as well barriers to attendance. In addition, demographic, media consumption and spending behaviour data was captured; and
- due to some of the case study venue audiences having limited access to the internet, a series on in-person surveys were conducted in Da Venue (KwaThema), Lahliwe’s (Khutsong) and Iketleng (Vereeniging) in early 2015.

This report presents both the Masters qualitative research report alongside the supplementary Concerts SA quantitative audience research findings.

### 2.1 Research Methods

As this study built upon the most recent South African live music venue mapping research, the 2013 *Songlines* report, an overarching case study approach was used to select live music venues and associated samples of audiences as the research subjects. The selected case studies and were sourced through Concerts SA and are all small, independent live music venues located in Gauteng. While there are different approaches to case studies, they all have in common an emphasis on study in-depth and Somekh and Lewin suggest that they combine a subject focus (i.e. audience motivation, appreciation and barriers) with a physical location (i.e. live music
venues in Johannesburg). Case studies aim to understand the ‘cases’ rather than generalising to a population, so while you could generalise some of the findings to the wider population in Gauteng and South Africa, the spatial legacies of apartheid could potentially produce very different results if the research was located in another city or province. This indicates that the study could be replicated in other locations in South Africa to allow for a wider analysis of audiences’ differences and commonalities. Furthermore, different issues, such as seasonality, affect the live music sector more intensely in coastal locations such as Cape Town and Durban which could produce different insights. Within Johannesburg itself, respondents singled out venues in the northern suburbs, namely Sandton, as having a different, less appealing offering than the case study venues. Another case study located in Sandton could have helped to present a fuller picture of different audiences in Johannesburg.

This study has also been conducted from the perspective of venue owners and marketers and their audiences and does not include insights from artists or promoters. While artists’ and promoters’ understanding of audiences was not in the scope of this research, it is recognised as an important future contribution to this area of study in South Africa.

An initial discussion with Concerts SA identified the following venues as potential case studies. The venues chosen were situated in different locations around Gauteng provided the opportunity to test attendance barriers based on racial and spatial legacies of apartheid.

- Lucky Bean (Melville)
- Afrikan Freedom Station (Westdene)
- The Orbit (Braamfontein)
- Soweto Theatre - Soweto Arts and Craft Fair (Soweto)
- Niki’s Oasis (Newtown)
- Nico’s Bar (Sokhulumi)
- Lepie’s Kitchen (Zithobeni)
- Iketleng (Vereeniging)
- Lahliwe’s (Khutsong)
- Da Venue (KwaThema)

The final research featured the following venues as case studies. See Appendix for a description of each case study venue.

- Lucky Bean (Melville)
- Afrikan Freedom Station (Westdene)
- The Orbit (Braamfontein)
- Soweto Theatre - Soweto Arts and Craft Fair (Soweto)
- Niki’s Oasis (Newtown)
- Iketleng (Vereeniging)
- Lahliwe's (Khutsong)
- Da Venue (KwaThema)

This study is a collective case study which includes a number of single studies investigated concurrently for the purpose of researching an issue and/or issues. Prior to collecting data, it was essential to gain permission to investigate the case and have an advocate in the organisation who could assist with sourcing audience samples and providing information. The
final research methodology used both qualitative and quantitative methods including background secondary research, in-depth interviews, quantitative surveying and observation.

Quantitative research was utilised to better understand the Concerts SA-supported network of venues’ audiences. Audience motivation to attend live music, consumption and experience expectations as well barriers to attendance. In addition to this, demographic, media consumption and spending behaviour data was also captured. An online survey was established on Survey Monkey in November 2014 which ran until March 2015. The case study venues were asked to promote the survey to their audiences through their websites, social media and newsletters. Some venues were more proactive than others in promoting the survey, so to avoid skewing of the results to favour one venue’s audience, we extended the promotion of the survey to Concerts SA and SAMRO’s networks as well as implementing a targeted Facebook advertising campaign in early 2015 (see the appendix for the online survey). The target response number for completed online surveys was 300. Response was incentivised with the promise of being randomly selected to win R1000 to spend at Computicket if they supplied their email address. The final number of online respondents was 308.

In addition to the online survey, in-person surveys were conducted with audiences in the venues located outside of Johannesburg - Iketleng (Vereeniging), Lahliwe's (Khutsong) and Da Venue (KwaThema). A shortened version of the online survey was given to the respondents at the venues during one of the Concerts SA-supported live music events (see the appendix for the questionnaire). Thirty-five in-person surveys were conducted across the three venues.

Qualitative in-depth interviews were undertaken with seven young people (aged 18-to-25-years) who had frequented the case study venues. In-depth interviews were also undertaken with nine venue staff or promoters. These interviews were used to gather background on the venue and industry as well as to test understanding and practice of audience development. For seven out of eight of the case studies, the venue owner was also responsible for marketing without dedicated marketing resources. A number of promoters who regularly hosted events at some of the case study venues were also interviewed. Both structured and semi-structured interview techniques were adopted for the in-depth interviews using closed and open-ended questions (see the appendix for the draft interview questions). The structured aspect of the interview explored audiences’ motivation for attending live music using Morris Hargreaves McIntyre’s motivation-based audience development model. For example, respondents were asked a series of structured questions which aimed to uncover which of the need levels most informs their motivation to attend live music venues. Another structured aspect of the audience interviews aimed to understand the psychographics of the respondents and how it may influence the study’s phenomena i.e. motivations, consumption and barriers. To help frame this aspect of the research the SAARF LSM to help define respondents beyond their own definitions of ‘race’, first language, sex and age. Unstructured questions aimed to uncover more insight about consumption patterns and barriers to attending live music, complemented by the venue observation.

Interviews were conducted with the following venue owners and promoters (see a full list of interviewees in the primary sources section):

- Lucky Bean (Melville)
- Afrikan Freedom Station (Westdene)
- The Orbit (Braamfontein)
- Soweto Theatre (Soweto)
- Niki’s Oasis (Newtown)
- Iketleng (Vereeniging)
- Soweto Arts and Craft Fair (promoter)
- Jozi Unsigned (promoter)

This study used observation research in conjunction with in-depth interviews primarily to understand the audiences’ consumption behaviour at live music events in the venues. Furthermore, observation helped to qualify the validity of some of the interviewees’ perceptions. Eight live music events were observed and the types of information recorded included audience breakdown, audience data capturing techniques, transport modes, drinks and food purchasing behaviour, arrival times and length of attendance as well as behavioural responses to the live music itself like dancing or applauding after sets.

2.2 Sampling

Qualitative research sampling is less structured and uses non-probability sampling, that is, the sample is not representative and can often be a group that the researcher has easy access to. The initial live music venue case study targets for the Masters research were selected as having relevance to the project using purposive or judgemental sampling and used the following selection criteria guided by the 2013 Songlines report and based on the following considerations.

- Access to the subject
  - Will the venue assist in sourcing audience samples? Was it selected as one of the 103 venues studied for the 2013 Songlines report and therefore be more willing to cooperate with researchers?
  - Does the venue attract 18-to-25-year-old-audiences even if it is not their primary audience?
  - Does the venue programme live music, which excludes venues that only programme DJs and those which don’t offer backline, PA equipment and sound engineering services?
  - Is the venue located in the wider metro area of Johannesburg?

- Access to expertise: Does the venue have a regular programme of live music (at least one live music event per month) with dedicated experts responsible for live music programming and marketing and/or audience development?
- All venues in the Concerts SA network were asked to circulate the online quantitative survey with their audiences.
- The additional venues where in-person audience and venue owner research was conducted were selected based on availability of live music events during the research period.

An initial strategy for sampling youth audiences for the qualitative interviews was to ask the venues to reach out to their online and personal networks to source respondents. This approach was met with limited success with only two out of the four venues referring potential respondents. Once the respondents were contacted, only one out of six contacts agreed to be interviewed. Foreseeing this challenge upfront, a parallel strategy was undertaken sourcing
respondents from the researchers own network of young people connected with Livity Africa, a youth agency which produces a national youth media platform, Live SA, created for and by 18- to-25-year-olds. Respondents were contacted by email or in person and interviewed if they had attended any of the case study venues. A possible limitation of the respondent make up was that they were all Black South Africans. While the study would have benefited from respondents of other ‘races’, the respondents reflect the dominant racial breakdown of both Johannesburg and the venues themselves as identified by the interviewees. Furthermore, the quantitative online survey did have representation of all ‘races’ where 58% of respondents identified themselves as Black, followed by 23% White, 6% Asian and 3% Coloured.

2.3 Data Recording and Analysis

Multiple methods of recording data were utilised for the different collection methods. All of the qualitative interviews were audio recorded then transcribed, supplemented with written notes. Interview insight was coded based on how many times those insights were mentioned. If the insight was mentioned by more than two people it was recognised as significant. Insights were also highlighted which linked to the Masters’ literature review. The venue and audiences were analysed separately first, followed by a comparative analysis to find linkages across insights. Coding was first written on paper and then completed using an Excel document.

The quantitative survey respondents either completed online or paper surveys, which were then analysed in Excel. Online respondent data was also analysed by age, gender and ‘race’. All interviewees and survey respondents were offered the opportunity for their comments to be anonymous. Observation was captured through written notes only.

All raw data has been archived by Concerts SA, the University of Witwatersrand and the researcher. Finally, the study was conducted with the approval of the Research Ethics Committee of the University of Witwatersrand and is bound by its guidelines for ethical research practice.

2.4 Limitations

It is important to acknowledge some of the limitations to using a small quantitative sample and qualitative research methods including a lack of representativeness, generalizability and comparability. As a small, focused study this research can’t be generalised to all South Africans, however it will hopefully demonstrate an approach to measuring and understanding audiences which could be replicated and scaled to a larger, broader sample. The structure of the survey could also be replicated in other provinces and cities in South Africa to ensure representativeness. Future recommended research will be outlined in the final section of the report.

Another limitation example would be the vulnerability of researcher bias. While the researcher has bias, her objectivity from South Africa’s recent history as well as experience with live music audiences in Australia, the UK and Africa brings a broader perspective to this study. However, for future research, it is recommended to be conducted in different languages with multilingual researchers conducting the field research to avoid any exclusion bias in the data capture and findings based on lack of access.
Research Findings: Some Highlights

Audience Motivations

- The main reason people attend live music is to see talented musicians perform, followed by having fun with friends then an interesting night out. The musician performing and music genre are the most important considerations motivating people to attend specific live music events. Audiences are looking for close and intimate connections with artists.

- Young people of the same age and ‘race’ have different motivations to attend live music. Social interaction at live music is common to all, however it is often the secondary motivation behind an emotional or spiritual/self-actualisation motivation. Young audiences are more motivated to have a new experience at live music events than mature audiences.

Live Music Experience

- 77% of the Concerts SA’s audience preferred to see live music in a dedicated venue, followed by music festivals (49%). The most frequented venues were The Orbit, CocaCola Dome, Bassline, FNB Stadium and Soweto Theatre.

- Braamfontein was the most popular area to see live music cited by the online respondents, followed by Soweto, Pretoria and Newtown.

- Young people desire a feeling of space to move and the freedom to interact with live music in their chosen way. Young people are searching for authenticity from their live music experience including the venue offering, the artists and their fellow audience members.

- Young audiences prefer an authentically-diverse audience at live music events. While there was a slight skew to online respondents believing all venues were open to all ‘races’ in Gauteng, there were many people who felt they weren’t.

- Young audiences are searching for uniqueness in the venue, experience and artists. They have a strong sense of individual identity or self-identity, and are less prone to peer pressure.

- 30% of online respondents attended live music a couple of times a year, while 30% attended once a month. Young audiences expressed a desire to attend live music more often.

- Most people in Johannesburg preferred to attend live music events on Saturday nights, whereas audiences at venues based in wider Gauteng preferred Saturday afternoons. Audiences in Johannesburg were happy to spend over R200 for one-off live music events, compared with R100 by audiences at venues based in wider Gauteng.

- The majority of Concerts SA’s online respondents drove their car to live music events, however young people were more likely to catch public taxis.

Marketing

- Over 80% of online respondents used social media to find out about live music events, followed by word-of-mouth (43%) and mentions in the media (41%). Facebook was the most popular social media platform used by both online and face-to-face survey respondents.
Research Findings: Some Highlights

Barriers

- Price sensitivity and access to disposable income were the main two barriers for young people attending live music more often. Price was also the main barrier to Concerts SA Johannesburg audiences attending more live music (45%), followed by lack of consistent live music events (30%). People surveyed in wider Gauteng cited a lack of transport and security plus location proximity as their top three barriers to attendance.

- Accessibility including a lack of public transport and personal safety were identified as significant physical barriers to attending live music by the 18-to-25-year-old interviewees. Plus a lack of consistent marketing and promotion was also identified as a barrier to attendance by young people.

- Venues with cultural heritage not shared by all ‘races’ in Johannesburg could face perception barriers that the place is “not for me.” New venues such as the Soweto Theatre and The Orbit may be seen as more neutral, and therefore have more appeal to all ‘races’.

Audience Development

- 7 out of 8 venue owners had multi-disciplinary roles holding responsibility for business development, operations, marketing and artistic programming.

- Only one venue had a dedicated person for audience development, however there was a desire to have marketing specialists in the organisation or through external partnerships by all venues.

- The arts marketing profession among the case studies is largely sitting between the professionalization and discovery period with marketing orientation not fully embedded in 7 out of 8 venues.

- Venue owners had different interpretations of what audience development is and only two venues appeared to be artistically-led and audience-focused.

- None of the venues had undertaken formal audience research, however they all expressed a desire to conduct research in the future. All venues conduct informal audience research.

- Some of the venues described their audiences using different types of informal segmentation approaches including demographic, behavioural and benefit segmentation.

- All of the venues felt wider industry/government collaboration was needed to grow a culture of live music attendance at venues.

- There is a shortage of arts marketing and audience development skills in the live music sector with demand for specific skills including digital marketing, publicity, digital content creation, customer database management and sales.

- A common discourse among all venues was their frustration with some artists who were not proactively marketing performances at their venues.
3. Research Findings

Below is a summary of the findings of the primary research which included online and in-person background information; in-depth interviews with audience and venue staff; online and in-person quantitative research; and finally, personal observation at the venues. The findings have been linked to the scholarship outlined in the background section as well as relevant research. New scholarship has been introduced to provide a richer discussion around new insights uncovered during the primary research.

The findings will be presented in the following key areas.

- Young audiences - motivations for, and barriers to, 18-to-25-year-old audiences attending and consuming live music in Johannesburg venues.
- Wider audiences – insights about the audiences who attend the Concerts SA network of live music venues in Gauteng.
- Venues - the level of understanding and practice of audience development by Johannesburg live music venues.
- Digital – the significance of digital to audiences and audience development today.

See the appendix for a detailed profile of all of the qualitative and quantitative research respondents and case study venues.

3.1 Live Music Attendance Motivation

Younger Audiences

One of the research aims was to use a motivation-led audience development model to segment audiences in South Africa. With a history of dividing society based on ‘race’, this contemporary approach, which is championed by arts marketers globally, could present a new way of looking at live music audiences here. Furthermore, with such a large percentage of the population being young (30% of the population is aged between 15 and 34 years)\textsuperscript{xxxii}, and an even greater population identified as Black (80% of the population) there appears a need for a more sophisticated method of segmenting this large collective audience\textsuperscript{xxxiv}.

This study references a more recent motivation-led audience development model developed by United Kingdom audience experts – Morris Hargreaves McIntyre. As outlined in the literature review, their model is based on a hierarchy of audience motivations based on Maslow’s 1943 \textit{Hierarchy of Needs} theory\textsuperscript{xxxv}.

According to this model, audiences attend the arts to fulfil:

- a \textit{social need} – they want social interaction, entertainment, to feel included or warmth and security; or
- an \textit{intellectual need} – academic or professional interest, hobby interest, self-improvement or to stimulate children; or
- an \textit{emotional need} - aesthetic pleasure, awe/ wonder, personal relevance, connecting to the past or sense of cultural identity; or
- a \textit{spiritual need} – self-actualisation, escapism, contemplation or stimulate creativity\textsuperscript{xxxvi}.
While the Morris Hargreaves McIntyre model uses the term ‘spiritual’ as defined as ‘relating to or affecting the human spirit or soul as opposed to material or physical things,’ the term may be interpreted in South Africa as ‘relating to religion or religious belief.’ In a country like South Africa, where 80% of the population follows the Christian faith, the term ‘spiritual’ may not be appropriate to use in the context of audience motivation but rather replaced with ‘self-actualisation.’ ‘Self-actualisation’ is the peak of Maslow’s Hierarchy of Needs and refers to a desire for self-fulfilment and to become everything you are capable of being. Maslow’s theory suggests that people only seek to fulfil the peak motivation, ‘self-actualisation,’ after their basic needs or motivations are met. However, Morris Hargreaves McIntyre argue that when it comes to people’s engagement with the arts, people can be motivated at many levels of Maslow’s Hierarchy of Needs. This distinction is important to highlight in light of the findings, which uncovered that ‘self-actualisation’ was a strong motivator for young people and their relationship with live music.

The young respondents were asked two open-ended questions plus a structured question to determine their motivation. For example, the two open-ended questions were: how does live music make you feel; and why do you attend live music? Respondents were prompted with answer options for the structured question to further determine which motivation was strongest. I assigned the following answer prompts with an associated motivation based on the descriptions provided by Morris Hargreaves McIntyre. To:

- have an interesting night out (spiritual);
- have fun with friends (social);
- as a treat to relax or escape (spiritual);
- be intellectually stimulated (intellectual);
- have a new experience (emotional);
- see exceptional music talent (emotional); and
- be seen by the cool people (social).

The research indicated that young people of the same age and ‘race’ have different motivations to attend live music. Social interaction at live music was common to all respondents, however it was often the secondary motivation behind an emotional or spiritual/self-actualisation motivation. None of the respondents were motivated intellectually to see live music, however Lethabo suggested that some artists like The Brother Moves On did give the audience some intellectual stimulation during their live sets. She observed that in 2014, they were actively encouraging their audience to vote in the upcoming national election at one of their gigs.

Based on the interviews, three respondents (Lesedi, Polly and Nzolo) were more strongly motivated for social reasons to attend live music. Lesedi and Polly both cited a desire to have fun with their friends as well as a connection with their fellow audience members. For example, in response to the open question - why do you attend live music? - Lesedi commented ‘there’s always the chance of meeting new people...also with people with similar interests makes listening to music a little more great, a little more pleasurable.’ He added when we discussed his main motivation further ‘a great night out with friends I would say.’

For Polly, whose main motivation to attend live music was to have fun with friends, having a close physical connection with the audience is important. She liked to be in the middle of the
crowd and partying all evening. While socialising is very important to Polly, she also indicated an emotional connection with the artist and the sensorial experience of a live music event in the open-ended questions. ‘For the feel, I mean you are in a trance in that moment when they perform. You feel the music...The audience participate, join in song, feel the beats from the musicians. It’s the feelings and emotions which comes with putting the whole piece together of a live performance.’

Nzolo doesn’t attend live music to meet new people or socialise with friends, but to meet more basic human needs of entertainment and relaxation. Two of the respondents were emotionally motivated to attend live music including Lethabo and Ntombenhle. They indicated a deep connection and awe/wonder with the artist and live music experience. Both Lethabo and Ntombenhle have a deep interest and knowledge in artists, placing more emphasis on the quality of the sound during live performances, the curation of the artists and their cultural connection to the artist. They both mentioned how live music is connected to their personal history as well as the cultural history of Johannesburg and South Africa. In response to how does live music make you feel, Lethabo commented ‘it’s something I have grown up around, we used to go to the Market Theatre every Sunday and it was a family thing. Live music has a very nostalgic feel for me. At the same time it makes you feel very alive.’ Ntombenhle added ‘I find it very special. I mean, I’ve been a collector of music for a long time, I still collect CDs. But when you actually listen to people live, and it’s someone you really enjoy, it’s quite special to have that connection with them. It’s very different, you feel special. It’s like you really connecting with the artist and the music.’

Two respondents’ main motivation was spiritual or self-actualisation including Nomusa and Modisaotsile. When asked the structured question about her main motivation for attending live music, Nomusa cited escapism. ‘Well, the biggest one is definitely to escape from real life. When you go to a live music event it just feels like you’re stepping into another world and you can just forget about everything.’ Modisaotsile indicated a more physical (mind and body) spiritual connection to live music. He suggested that music lies within your heart and there should be a natural connection to people. This could be best described through his words. ‘It starts with the heartbeat. You know tapping your foot, so basically music is natural. Naturally people should just relate to music because we are all musical. That heartbeat, that’s a drum right there, it’s called a do good sound. So that’s how live music affects me.’

All respondents preferred to see live music with their friends over attending alone or with family, indicating an overall preference for social interaction alongside their main motivation. The quantitative findings support this finding that while social interaction is important, more young people had stronger motivations to attend live music. For example, 57% of the quantitative respondents aged 18 to 20 cited seeing talent musicians as their main motivation with 29% wanting to have fun with their friends. Similarly, 77% of respondents aged 21 to 29 cited seeing talent musicians as their main motivation with 37% wanting to have fun with their friends. While these two age brackets don’t correlate directly with the qualitative respondents, the findings are highlighted to illustrate a wider trend in live music audience motivation. This deeper emotional and spiritual/self-actualisation engagement with the arts in Johannesburg and Gauteng follows a global trend. The contemporary arts consumer is searching for self-actualisation, the top of Maslow’s Hierarchy of Needs pyramid, where the experience is expected to fulfil a spiritual need, as relating to or affecting the human spirit or soul as opposed to material or physical things.
The motivations of the young people interviewed were analysed based on their gender and SAARF LSM categories. While there were no obvious motivation trends evident among the LSM categories, it would be interesting to test this concept with a larger sample. For example, future research could explore whether escapism motivations, as indicated by Nomsa, are more significant in a larger sample of mid to low LSM categories. Mid to low LSM categories tend to earn less and have higher incidences of unemployment which prompts a question as to whether engagement in live music for escapism reasons would be a stronger motivating factor for these groups\textsuperscript{e}. Escapism through art has been explored in literature around the world with the recent global recession reigniting the discussion. International research has explored whether people seek out more arts engagement to immerse themselves in an imaginary world in order to forget, or imagine overcoming, their economic problems\textsuperscript{f}. An International Federation of Arts Councils and Cultural Agencies (IFACCA) international survey reported an expectation among their member organisations that people turn to the arts in times of turmoil for the arts’ ‘feel good’ factor. They believed demand for the arts wouldn’t decrease as much as in other industries during the global recession\textsuperscript{c}.

There was some alignment of motivation by gender with three out of four of the young women having deeper emotional and spiritual/self-actualisation motivations for attending live music. Similarly two out of the three men expressed being more socially motivated to attend live music. Once again, this gender difference would be interesting to test with a larger sample to determine if the gender motivation trends were significant. This finding may be connected to broader research which suggests that men and women process emotions differently due to the make-up of the brain\textsuperscript{g}. Another consideration was whether the men felt comfortable telling the female researcher how they were emotionally or spiritually connected with live music. An interesting interpretation of perceived differences among genders’ motivations was explored in an article written about BBC Radio. Former BBC Radio controller Lesley Douglas suggested that the BBC Radio music and presenter strategy was informed by the notion that women tend to have a more emotional reaction to music while men are more interested in the intellectual side of music, that is, the artists and where the album was made\textsuperscript{h}. While gender motivation differences offer a thought-provoking insight, it would really need to be researched in the South African context to be pursued further.

**Concerts SA Audiences**

Similar to the 18-to-25-year-old interview respondents, 76% of the online respondents citing seeing talented musicians perform as their primary motivation to attend live music. Once again, social interaction is still an important motivating factor with 26% of online respondents citing having fun with friends. Insight about what motivates audiences to attend live music, can assist venue owners, artists and promoters to better understand what to prioritise in the live music experience for their audiences as well as how to market their events to audiences. For example, an audience base which is purely socially motivated should ensure their venues has breakout spaces, seating and a bar for their audience to get the social interaction they are craving. Furthermore, the music line up could include breaks in between sets. On the other hand, audiences who are more emotionally-motivated with the live music experience may prefer a venue which ensures the performance is the focus of the experience. Marketing an event to this audience needs to facilitate an emotional connection between the performers and audience.
member through the initial promotion, at the event and post event. This could be done by providing exclusive access to the artist in the form of pre-event interviews on the venue’s social media platforms or a physical meet and greet session with audience leading up to the event.

The quantitative findings were analysed by gender, age and ‘race’ to identify any trends. Male and female online respondents both cited to see talented musicians perform as their main motivation (73% and 79% respectively), however a higher percentage of women attended live music to have fun with friends than men (33% to 18%) as well as to have an interesting night out (32% to 18%). While the survey sample is small, you could draw conclusions that the female Concerts SA’s audience may be more socially motivated to attend live music than men, however this would need to be tested against a larger sample. If this trend is qualified with a larger sample, venue owners and promoters could encourage greater attendance among women by promoting ticketing offers which encourage women to bring their friends with them i.e. three tickets for the price of two or an incentivised recommend/bring a friend scheme.

Respondents from all ‘races’ cited to see talented musicians perform as their main motivation to attend live music, however there were variations in some of the other motivations. Keeping in mind respondents could nominate more than one motivation, people who identified themselves as White were less motivated for an interesting night out and having a new experience, however more motivated by being intellectually stimulated at a live music event. This differed from people who identified themselves as Black or Coloured who were most motivated by having fun with friends. Finally, people who identified themselves as Asian had varied motivations, however there was no motivation to be intellectually stimulated or to dance at live music events.
While all age groups cited to see talented musicians to perform as their main motivation to attend live music, 18-to-20-year-olds were more motivated to have a new experience at live music events than older respondents such as 50-year olds. This is an important insight as this group are interested in having new or unique experiences, a finding which also appeared in the 18-to-25-year-olds interviewed. Once again this has implications for venue owners and promoters in their marketing and ticketing strategies. For example, many venues implement long-term audience development strategies which gives a percentage of tickets (often those tickets which may not have been sold anyway) to potential audiences such as university students or artists for free as a way on introducing them to the venue or a new arts experience.

Another important finding, indicated that people over 40 years wanted to relax at live music events more than people in their 20’s or 30’s and the motivation to have fun with friends at a live music event dipped with people over 50 years. Venues which attract mature audiences often tailor the experience to this preference at the expense of attracting young audiences. While mature audiences may be the venue’s bread and butter, they should be mindful of their future audiences and potentially offer different live music experiences on different nights or with work with different promoters to attract a more diverse audience.

Table 1 Online Respondents’ Motivation ‘Race’ Comparison

<table>
<thead>
<tr>
<th>What is the main reason you attend live music?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have an interesting night out</td>
<td>50.00</td>
<td>25.83</td>
<td>25.00</td>
<td>13.46</td>
</tr>
<tr>
<td>Have fun with friends</td>
<td>50.00</td>
<td>30.00</td>
<td>31.25</td>
<td>19.23</td>
</tr>
<tr>
<td>As a way of relaxing</td>
<td>16.67</td>
<td>20.00</td>
<td>12.50</td>
<td>17.31</td>
</tr>
<tr>
<td>Be intellectually stimulated</td>
<td>0.00</td>
<td>21.67</td>
<td>12.50</td>
<td>30.77</td>
</tr>
<tr>
<td>To see talented musicians perform</td>
<td>66.67</td>
<td>81.67</td>
<td>56.25</td>
<td>75.00</td>
</tr>
<tr>
<td>To dance</td>
<td>0.00</td>
<td>15.83</td>
<td>31.25</td>
<td>7.69</td>
</tr>
<tr>
<td>Have a new experience</td>
<td>16.67</td>
<td>27.50</td>
<td>6.25</td>
<td>9.62</td>
</tr>
<tr>
<td>To be seen with right people</td>
<td>0.00</td>
<td>1.67</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Younger Audiences

Six out of seven of the 18-to-25-year-old respondents indicated they were motivated to see live music over recorded music to have a close visual and sensorial connection with the artists performing. Furthermore, the music genre and knowledge of the artist are strong motivators for young people to attend specific live music events or venues. This finding is supported by the findings of the quantitative findings which indicated that seeing talented musicians perform was the strongest motivator for 18-to-20-year-old and 21-to-29-year-old respondents to attend live music events. Music is an important part of all of the younger interviewees' lives. This insight is reinforced by a 2014 national youth insights study by consumer insights firm, Pondering Panda, which reported that over 70% of respondents rated music as an important part of their life.

Table 2 Online Respondents’ Motivation Age Comparison

<table>
<thead>
<tr>
<th>What is the main reason you attend live music?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have an interesting night out</td>
<td>14.29</td>
<td>29.55</td>
<td>25.93</td>
<td>30.77</td>
<td>5.56</td>
<td>23.08</td>
</tr>
<tr>
<td>Have fun with friends</td>
<td>28.57</td>
<td>37.50</td>
<td>14.81</td>
<td>26.92</td>
<td>11.11</td>
<td>7.69</td>
</tr>
<tr>
<td>As a way of relaxing</td>
<td>0.00</td>
<td>15.91</td>
<td>24.07</td>
<td>34.62</td>
<td>22.22</td>
<td>0.00</td>
</tr>
<tr>
<td>Be intellectually stimulated</td>
<td>7.14</td>
<td>22.73</td>
<td>20.37</td>
<td>30.77</td>
<td>33.33</td>
<td>23.08</td>
</tr>
<tr>
<td>To see talented musicians perform</td>
<td>57.14</td>
<td>77.27</td>
<td>81.48</td>
<td>73.08</td>
<td>77.78</td>
<td>69.23</td>
</tr>
<tr>
<td>To dance</td>
<td>7.14</td>
<td>19.32</td>
<td>11.11</td>
<td>7.69</td>
<td>5.56</td>
<td>7.69</td>
</tr>
<tr>
<td>Have a new experience</td>
<td>28.57</td>
<td>22.73</td>
<td>22.22</td>
<td>23.08</td>
<td>5.56</td>
<td>7.69</td>
</tr>
<tr>
<td>To be seen with right people</td>
<td>7.14</td>
<td>1.14</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

3.2 Connection with the Artist

Table 3 Online Respondents’ Considerations Motivating Attendance Age Comparison

<table>
<thead>
<tr>
<th>What is most important to you when deciding to attend a live music event</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Music genre</td>
<td>35.71</td>
<td>44.32</td>
<td>53.70</td>
<td>46.15</td>
<td>55.56</td>
<td>46.15</td>
</tr>
<tr>
<td>Musician performing</td>
<td>42.86</td>
<td>75.00</td>
<td>79.63</td>
<td>69.23</td>
<td>61.11</td>
<td>46.15</td>
</tr>
<tr>
<td>Venue</td>
<td>14.29</td>
<td>22.73</td>
<td>24.07</td>
<td>34.62</td>
<td>11.11</td>
<td>0.00</td>
</tr>
<tr>
<td>Location</td>
<td>28.57</td>
<td>21.59</td>
<td>25.93</td>
<td>11.54</td>
<td>27.78</td>
<td>23.08</td>
</tr>
<tr>
<td>You feel comfortable with the crowd</td>
<td>0.00</td>
<td>14.77</td>
<td>11.11</td>
<td>7.69</td>
<td>5.56</td>
<td>0.00</td>
</tr>
<tr>
<td>Type of experience</td>
<td>7.14</td>
<td>20.45</td>
<td>22.22</td>
<td>7.69</td>
<td>22.22</td>
<td>0.00</td>
</tr>
<tr>
<td>Price</td>
<td>42.86</td>
<td>39.77</td>
<td>24.07</td>
<td>23.08</td>
<td>11.11</td>
<td>7.69</td>
</tr>
<tr>
<td>Ease of access</td>
<td>0.00</td>
<td>20.45</td>
<td>14.81</td>
<td>19.23</td>
<td>16.67</td>
<td>7.69</td>
</tr>
</tbody>
</table>
The younger people interviewed saw live music as an opportunity for a unique intimate connection with artists and the musicians which you can’t get with recorded music. Lethabo quoted musician Erykah Badu in her response to how live music makes her feel. ‘Erykah Badu says “with recording music, you’re perfecting a moment but when you perform live you are creating a moment – where you feel it.”’ Polly added ‘you live, you feel, there is no room for mistakes and you can see the emotions from the musicians. I think it’s better than sitting behind some computer putting together some beats. Everything is live, you can feel the drums and hear the piano. I actually prefer live music over any other music as it gets me in the groove rather than listening to recorded music.

Knowledge of the artist and the type of genre is also important for younger audiences. Ntombenhle, Lethabo and Nzolo all indicated they are motivated to attend a live music event to see a specific artist or genre. Furthermore, three of the respondents indicated a need for quality sound and strong artist performance at live events, demonstrating a deeper knowledge of artists and their music. Nomsa noted when asked about what aspects she thinks about at live music events, ‘the quality of the music and the sound needs to be on point. Like I hate going to live events and the sound just sucks. And the artist’ performance has to be on point.’ Ntombenhle added ‘I feel like musicians really have to come through and really perform. I mean like you get musicians who are very lazy, and that’s quite disappointing if you paid a lot of money.

Music genre is still a motivating factor to many of the respondents who when asked which genres they liked to see live, only one person said all genres. The most common genres were hip hop, contemporary African, jazz and electronic. The quantitative findings indicated hip hop and RnB/soul were also popular among 18-to-20-year-old respondents with jazz popular alongside hip hop and RnB/soul with 21-to-29-year-olds.

It is important to note that genres may differ slightly for a survey of young people with a national geographical spread and a more diverse sample base. For example, BASA’s national Arttrack No. 6 report indicated that hip hop, gospel and kwaito were the most popular genres among 19-to-24-year-olds. The qualitative interview didn’t locate trends in music genre by gender or SAARF LSM, however this could be seen in the quantitative findings. BASA’s Arttrack No. 6 report illustrated a difference in genre preference by gender and SAARF LSM, however the report didn’t combine categories in their analysis, such as SAARF LSM and age, so it could be an area for further analysis in future surveys with larger samples.

**Concerts SA Audiences**

The online and in-person Concerts SA audience respondents also indicated a strong desire for a connection with the artist and genre. The musician performing and music genre were the most important considerations motivating the online respondents to attend live music (70% and 47% respectively). Location, venue and price were also important considerations to around a quarter of the online respondents. There was a slight difference in the considerations most important to the people surveyed in person at venues outside of Johannesburg. While the musician performing was most important, feeling comfortable with the crowd was a more important consideration than music genre. The venues situated outside of Johannesburg were situated in locations which attracted a more local audiences (that is people who lived within the same municipality as their venue they had attended) and therefore feel more comfortable with a venue and audience they know.
Both men and women cited the musician performing and music genre as the most important considerations when deciding to attend a live music event.

**Table 4 Online Respondents’ Considerations Motivating Attendance ‘Race’ Comparison**

<table>
<thead>
<tr>
<th>What is most important to you when deciding to attend a live music event?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Music genre</td>
<td>50.00</td>
<td>48.33</td>
<td>50.00</td>
<td>44.23</td>
</tr>
<tr>
<td>Musician performing</td>
<td>66.67</td>
<td>77.50</td>
<td>68.75</td>
<td>59.62</td>
</tr>
<tr>
<td>Venue</td>
<td>16.67</td>
<td>26.67</td>
<td>12.50</td>
<td>11.54</td>
</tr>
<tr>
<td>Location</td>
<td>16.67</td>
<td>23.33</td>
<td>43.75</td>
<td>23.08</td>
</tr>
<tr>
<td>You feel comfortable with the crowd</td>
<td>0.00</td>
<td>10.83</td>
<td>12.50</td>
<td>7.69</td>
</tr>
<tr>
<td>Type of experience</td>
<td>0.00</td>
<td>22.50</td>
<td>31.25</td>
<td>1.92</td>
</tr>
<tr>
<td>Price</td>
<td>16.67</td>
<td>37.50</td>
<td>25.00</td>
<td>17.31</td>
</tr>
<tr>
<td>Ease of access</td>
<td>16.67</td>
<td>20.00</td>
<td>18.75</td>
<td>9.62</td>
</tr>
</tbody>
</table>

Respondents from all ‘races’ cited the musician performing and music genre as the most important considerations when deciding to attend a live music event. There were some differences in music genre preferences across age, gender and ‘race’ among the Concerts SA audience’s online respondents. The most popular genre of music to see live is jazz (63%), followed by RnB/soul (46%) and hip hop (35%). People surveyed in person at venues outside of Johannesburg most preferred to see jazz music live, followed by RnB/soul. Hip hop, gospel and house were also popular with this group.

Both male and female online respondents cited jazz, RnB/soul and hip hop as their top genre preferences to see live. Women had a greater preference for RnB/soul (57% to 33%) and pop.
(21% to 11%) than men, while more men preferred rock (31% to 22%) and electronic (15% to 5%) music than women.

There were differences in music genre preferences with:

- people who identified themselves as Asian most preferring rock (83%);
- people who identified themselves as Black most preferring jazz (65%);
- people who identified themselves as Coloured most preferring RnB/soul (63%); and
- people who identified themselves as White most preferring jazz (60%).

People who identified themselves as Black liked to see hip hop live music much more than the other racial groups. Gospel and RnB/soul music was more popular with people who identified themselves as Black or Coloured, while rock and classical music were more popular with people who identified themselves as White or Asian.

Chart 3 Online Respondents' Music Genre Preference
Jazz was the most popular genre of music to see live with online respondents in all age groups except 18-to-20-year-olds who most preferred hip hop. Electronic, house and hip hop were more preferred by people under 40 years. Classical music was more preferred by people over 50 years. Pop, RnB/soul, rock and indie/alternative was preferred by all age groups.

<table>
<thead>
<tr>
<th>What are the top three music genres you like to see live?</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic</td>
<td>5.45</td>
<td>14.56</td>
</tr>
<tr>
<td>Gospel</td>
<td>10.00</td>
<td>18.45</td>
</tr>
<tr>
<td>House</td>
<td>17.27</td>
<td>20.39</td>
</tr>
<tr>
<td>Hip Hop</td>
<td>39.09</td>
<td>30.10</td>
</tr>
<tr>
<td>Indie/Alternative</td>
<td>27.27</td>
<td>27.18</td>
</tr>
<tr>
<td>Jazz</td>
<td>60.91</td>
<td>65.05</td>
</tr>
<tr>
<td>Kwaito</td>
<td>5.45</td>
<td>9.71</td>
</tr>
<tr>
<td>Pop</td>
<td>20.91</td>
<td>10.68</td>
</tr>
<tr>
<td>RnB and Soul</td>
<td>57.27</td>
<td>33.01</td>
</tr>
<tr>
<td>Rock</td>
<td>21.82</td>
<td>31.07</td>
</tr>
<tr>
<td>Traditional</td>
<td>10.91</td>
<td>13.59</td>
</tr>
<tr>
<td>Classical</td>
<td>9.09</td>
<td>9.71</td>
</tr>
</tbody>
</table>

Jazz was the most popular genre of music to see live with online respondents in all age groups except 18-to-20-year-olds who most preferred hip hop. Electronic, house and hip hop were more preferred by people under 40 years. Classical music was more preferred by people over 50 years. Pop, RnB/soul, rock and indie/alternative was preferred by all age groups.

<table>
<thead>
<tr>
<th>What are the top three music genres you like to see live?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic</td>
<td>7.14</td>
<td>13.64</td>
<td>11.11</td>
<td>3.85</td>
<td>5.56</td>
<td>0.00</td>
</tr>
<tr>
<td>Gospel</td>
<td>28.57</td>
<td>14.77</td>
<td>14.81</td>
<td>11.54</td>
<td>0.00</td>
<td>15.38</td>
</tr>
<tr>
<td>House</td>
<td>35.71</td>
<td>23.86</td>
<td>20.37</td>
<td>11.54</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Hip Hop</td>
<td>57.14</td>
<td>52.27</td>
<td>31.48</td>
<td>11.54</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Indie/Alternative</td>
<td>21.43</td>
<td>26.14</td>
<td>35.19</td>
<td>23.08</td>
<td>27.78</td>
<td>15.38</td>
</tr>
<tr>
<td>Jazz</td>
<td>28.57</td>
<td>59.09</td>
<td>72.22</td>
<td>73.08</td>
<td>72.22</td>
<td>61.54</td>
</tr>
<tr>
<td>Kwaito</td>
<td>7.14</td>
<td>6.82</td>
<td>12.96</td>
<td>7.69</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Pop</td>
<td>35.71</td>
<td>18.18</td>
<td>12.96</td>
<td>11.54</td>
<td>22.22</td>
<td>0.00</td>
</tr>
<tr>
<td>RnB and Soul</td>
<td>37.50</td>
<td>52.27</td>
<td>51.85</td>
<td>30.77</td>
<td>27.78</td>
<td>7.69</td>
</tr>
<tr>
<td>Rock</td>
<td>21.43</td>
<td>20.45</td>
<td>29.63</td>
<td>26.92</td>
<td>44.44</td>
<td>38.46</td>
</tr>
<tr>
<td>Traditional</td>
<td>0.00</td>
<td>14.77</td>
<td>12.96</td>
<td>11.54</td>
<td>11.11</td>
<td>7.69</td>
</tr>
<tr>
<td>Classical</td>
<td>0.00</td>
<td>1.14</td>
<td>1.85</td>
<td>11.54</td>
<td>38.89</td>
<td>61.54</td>
</tr>
</tbody>
</table>
Music genre is important to understand in South Africa as there are still racial preferences, making it more difficult to attract authentically diverse crowds. Music curators and festival organisers in South Africa are now adding different genres to the same line-up to attract a more racially-diverse crowd. There are also new South African artists that fuse genres such as Brother Moves On, Spoek Mathambo, John Wizards and Thandiswa Mazwai who are starting to attract more diverse young audiences which is an important trend to observe over time to see if it starts to change music genre preferences among ‘races’ in South Africa.

3.3 Authenticity and Hedonic Consumption

Younger Audiences

The role of the audience member in a live music experience has evolved with the new arts consumer having moved beyond being a passive recipient of a performance to being central to its value-creation. That is, the artist and venue don’t create the live music experience alone, the audience participates in creating it through the process of co-production via their active engagement and response to the artist and audience. Furthermore, the audience now determines the quality or value of a live music performance by more than just the music alone – their hedonic response.

Hedonic consumption has been explored in this report’s background section, however before looking at findings of the research in this area, it is worth reiterating what is meant by hedonic consumption. Santoro and Troilo define a hedonic response as ‘a combined response from the emotions, senses, imagination, and intellect’ and argue that audiences expect live performances to create an absorbing experience that arouses their emotions, stimulating a physical reaction, prompting memories or triggering an intellectual response.

Six out of the seven of the 18-to-25-year-old interviewees’ consumption of live music appeared to be less about the physical products and services i.e. what the venue looks like or which drinks they can get, but rather about the multi-sensory and emotive aspects of their experience. For example, there was a strong indication from respondents that they desired a feeling of space to move and the freedom to interact with live music in their chosen way. Nomsa commented on her first experience at the Soweto Theatre ‘the lighting and the stage where the artist performs is just beautiful. The props are in order and you can’t help but feel like it’s a beautiful moment’. Polly, Modisaotsile and Lesedi liked outdoor and open spaces to see live music. Modisaotsile said ‘I believe in open air live music events because closed up places are very limiting for people to process what they are hearing’. Lesedi added ‘I like open air events. It just feels a little more atmospheric. It feels more open in a way, larger and wider. More unrestricted’. Finally, Lethabo noted that it is not always about being in a large space, however having the space and freedom to enjoy the experience in a space that is not too crowded. Open spaces like Mary Fitzgerald Square, Zoo Lake and Constitution Hill were mentioned by four respondents as their preferred spaces to see live music. Furthermore, the quantitative findings indicated that 18-to-20-year-olds preferred to see live music at a music festival over other spaces, while all other age groups cited a live music venue as their preference.
This preference for open spaces to see live music is a very interesting finding which could explain the growth of attendance at music festivals in South Africa. The search for openness and the freedom to personalise their live music experience also reflect wider societal themes about young people in South Africa feeling their voice and choices are sometimes restricted by more senior members of society. There were a number of comments from the respondents about how they felt a degree of exclusion from some case study venues based on the venue’s prescribed audience experience. Lesedi referred to his experience at one of the case study venues in response to the question as to whether he felt welcome at that venue as a young person. ‘No. And it’s quite easy to discern really. I think it’s a bit premium. It feels sort of like the Black premium people are targeted, you know people with money. And so when you walk in as a young person, there is that sort of condescending attitude like they really want sell you single malts or Glendfiddich. Even if you’re coming in to appreciate the music, they want to sell that expensive bottle. That’s the kind of atmosphere I sensed.

In her book *Entanglement*, Nuttall explores the notion of space with the new post-apartheid generation, the Y-Generation. She cites The Zone in Rosebank Mall as new type of open space in stark contrast to the closed and exclusive European-style malls which still exist in Johannesburg today. She argues that The Zone enabled a new generation of young people to move around freely in the space, breaking away from a history of restrictiveness and invisibility the Black population suffered under apartheid. Notions of space and freedom to move around without restriction is an important insight of this study which will be discussed further in the reflections section of the report.

Osborne and Rentschler argue that authenticity is a vital ingredient in developing relationships with audiences: ‘an authentic arts experience engages the audience with the work; it does so by developing product which recognises the identity of the audience and is sincere in its approach’. Radbourne et al. adds that the greater the authenticity perceived by an audience, the greater their enjoyment of the experience. There are generally two elements to authenticity: the authenticity of what is being offered i.e. the live music performance, and the audience’s emotional perception or hedonic response. While the emotional perception of authenticity is experienced individually, this can become a collective response through engagement and communication with the other audience members. A large part of the respondents’ hedonic response was about authenticity. Two comments from Nomsa and Ntombenhle noted a desire for authentic and quality performances from artists in a live music performance. This aspect of authenticity was important to some respondents, however a much more common concern was authenticity from the experience and the venue offering as well as their fellow audience members. Radbourne et al. refers to this phenomenon as collective engagement, that is, the audience’s collective sense of engagement with the performers and the other audience members during the event and/or with discussions before or after the performance. This can be verbal and non-verbal sense of engagement.

Ntombenhle commented on how she liked Afrikan Freedom Station’s pan-African focus with the atmosphere feeling more authentic to her than some of the spaces in Braamfontein for the ‘cool kids.’ ‘It’s also one of those spaces that, yeah some of the cool kids do go there, but it doesn’t feel too Braamfontein-ey’. A very strong insight was the rejection of Sandton or northern suburban venues by a number of the respondents including Polly, Nomsa and Lethabo as they perceived the audience was not authentic, rather motivated by wealth and perceptions of wealth. ‘I don’t like places in the North, they’re fake. It’s just like, I don’t vibe with it. I like going
to a party and knowing that I can go there with my Converse All Stars¹ and have the time of my life without feeling like I’m underdressedcxxv. Polly added ‘I don’t feel welcome in Sandton. I don’t want to be in a space where I can’t be me, I am not middle class, upper class or lower class. I am not going to be under-dressed or over-dressed....Places where money rules, I wouldn’t enjoycxxvi.

Based on these perceptions, one new venue was observed located in the northern suburbs of Johannesburg, Sandton, to gather further insight into the respondents’ comments. As described earlier, the venue I observed in Sandton could be considered to be reflective of the statements made above by Polly and Lethabo. The venue overtly targeted people with disposable income who want an exclusive and VIP experience. The Black middle and upper classes continue to grow in South Africa resulting in new social dynamics in wealthy suburbs like Sandton, previously restricted to White South Africanscxxvii. Just as we see new levels of racial mixing in student areas like Braamfontein, the same is true for the home of the wealthy elite in Sandton. Lesedi observed that venues in Johannesburg now excluded people more on perceptions of class or wealth than ‘race’cxxviii. This preference for exclusive and socially-motivated spaces like the Sandton venue observed further demonstrates that young Black audiences shouldn’t be segmented purely on demographics, but rather highlights the importance of understanding their motivations and experience expectations.

Once again the qualitative research findings was analysed for trends among gender and SAARF LSM categories and it appeared that the female interviewees were more concerned with authenticity than the males. The 2014 Pondering Panda Youth Report also observed this insight, suggesting that males are more likely to have given into peer pressure than femalescxxix. Once again, this insight could be tested with a larger sample in future audience research.

Concerts SA Audiences

Live music spaces and experience preferences were explored through the quantitative research as well. 77% of the Concerts SA audience online respondents preferred to see live music in a dedicated venue, followed by music festivals (49%). This is not surprising considering this was a study of predominately venue audiences, so it would be good to be tested with a larger sample such as the BASA Artstrack bi-annual research. There was no obvious difference in space preference between men and women, however people who identified themselves as Black liked to attend live music events in restaurants and bars more than people who identified as another ‘race’.²

Once again, there was a slight difference in the considerations most important to the people surveyed in person at venues outside of Johannesburg. Following live music venues, community spaces were their preferred spaces for seeing live music than other spaces. This could be explained by the limited number of dedicated live music spaces in these locations, however it may also indicate a preference for attending music in a space they feel comfortable in. This finding may have implications for promoters looking to host live music in areas outside of cities. Audiences may prefer to see live music in a comfortable and familiar space over venues or arts centres. Looking at the Soweto Arts and Craft Fair, it hosts their event just outside the Soweto Theatre to remove barriers by audiences who are unfamiliar with traditional arts centre spaces. They also offer tours of the theatre on event days to provide opportunities for their audience to

¹ popular trainer brand among young people.
experience the theatre in an informal way in the hope they will come back to attend events inside the theatre as well as the fair.

Chart 4 Online Respondents’ Music Space Preference

Open air venues were also popular with Concerts SA audience’s online respondents with Cocoa Cola Dome and FNB Stadium featured in the top five venues, however dedicated live music venues were also popular with this audience. The venue preferences in this study may be skewed by the respondents’ loyalty to the venue they heard about the survey through, therefore another sample may produce different results. The people surveyed in person at venues outside Johannesburg preferred venues located nearby resulting a different list of venues than the online respondents who mainly lived in the City of Johannesburg or City of Tshwane (85% of respondents).
Table 7 Online Respondents’ Most Popular Venues

<table>
<thead>
<tr>
<th>Venue Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The Orbit</td>
<td>Venue</td>
</tr>
<tr>
<td>2. Cocoa Cola Dome</td>
<td>Stadium</td>
</tr>
<tr>
<td>3. Bassline</td>
<td>Venue</td>
</tr>
<tr>
<td>4. FNB Stadium</td>
<td>Stadium</td>
</tr>
<tr>
<td>5. Soweto Theatre</td>
<td>Venue</td>
</tr>
<tr>
<td>Afrikan Freedom Station</td>
<td>Venue</td>
</tr>
<tr>
<td>Carnival City</td>
<td>Casio/venue</td>
</tr>
<tr>
<td>Kitchener’s</td>
<td>Venue/bar</td>
</tr>
<tr>
<td>State Theatre</td>
<td>Venue</td>
</tr>
<tr>
<td>Joburg Theatre</td>
<td>Venue</td>
</tr>
<tr>
<td>MonteCasino</td>
<td>Casino /venue</td>
</tr>
<tr>
<td>Maboneng Precinct</td>
<td>Cultural Precinct</td>
</tr>
<tr>
<td>Linder Auditorium</td>
<td>University venue</td>
</tr>
<tr>
<td>Zone 6</td>
<td>Venue</td>
</tr>
<tr>
<td>Rumours Lounge</td>
<td>Venue</td>
</tr>
<tr>
<td>Mary Fitzgerald Square</td>
<td>Outdoor</td>
</tr>
<tr>
<td>Market Theatre</td>
<td>Venue</td>
</tr>
<tr>
<td>U-the-space</td>
<td>Venue</td>
</tr>
<tr>
<td>Zoo Lake</td>
<td>Outdoor</td>
</tr>
<tr>
<td>Niki's Oasis</td>
<td>Venue</td>
</tr>
<tr>
<td>Katzy's</td>
<td>Venue</td>
</tr>
<tr>
<td>Ellis Park</td>
<td>Stadium</td>
</tr>
<tr>
<td>Emmarentiа Dam</td>
<td>Outdoor</td>
</tr>
<tr>
<td>Newtown</td>
<td>Cultural Precinct</td>
</tr>
<tr>
<td>Shine Studios (SkyRoom Live)</td>
<td>Venue</td>
</tr>
<tr>
<td>Gold Reef City</td>
<td>Theme Park/venue</td>
</tr>
<tr>
<td>Winnie's Soul &amp; Jazz Restaurant</td>
<td>Venue</td>
</tr>
<tr>
<td>Alexander Theatre</td>
<td>Music venue</td>
</tr>
<tr>
<td>Arcade Empire</td>
<td>Music venue</td>
</tr>
<tr>
<td>Tanz Café</td>
<td>Venue</td>
</tr>
<tr>
<td>The Bohemian</td>
<td>Bar</td>
</tr>
<tr>
<td>Bannister Hotel</td>
<td>Venue/bar</td>
</tr>
<tr>
<td>Barnyard Theatre</td>
<td>Venue</td>
</tr>
<tr>
<td>Hard Rock Café</td>
<td>Restaurant</td>
</tr>
<tr>
<td>Wild Waters</td>
<td>Theme Park/venue</td>
</tr>
<tr>
<td>Sun City</td>
<td>Casino / venue</td>
</tr>
<tr>
<td>Pata Pata</td>
<td>Restaurant</td>
</tr>
<tr>
<td>King Kong</td>
<td>Venue</td>
</tr>
<tr>
<td>Locrate Market</td>
<td>Market</td>
</tr>
<tr>
<td>Lucky Bean</td>
<td>Restaurant</td>
</tr>
<tr>
<td>CurioCity Backpackers</td>
<td>Accommodation/bar</td>
</tr>
<tr>
<td>Dorothy Nyembe Park</td>
<td>Outdoor</td>
</tr>
<tr>
<td>Burgers Park</td>
<td>Outdoor</td>
</tr>
<tr>
<td>1Fox</td>
<td>Market</td>
</tr>
</tbody>
</table>
Table 8 In-person Survey Respondents’ Most Popular Venues

<table>
<thead>
<tr>
<th>Venue Name</th>
<th>Venue Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnival City</td>
<td>Gold Reef City</td>
</tr>
<tr>
<td>Bahamas</td>
<td>Ikatleng</td>
</tr>
<tr>
<td>Da Venue</td>
<td>Inside Out Lounge</td>
</tr>
<tr>
<td>Lahlwes</td>
<td>Joccbar</td>
</tr>
<tr>
<td>Chesa by night</td>
<td>Macute</td>
</tr>
<tr>
<td>Butis Inn</td>
<td>Raundy</td>
</tr>
<tr>
<td>Casino (Emerald Park)</td>
<td>Spykos</td>
</tr>
<tr>
<td>Chillas</td>
<td>Vaal venues</td>
</tr>
<tr>
<td>Coca Cola Dome</td>
<td>Value Meat in Witbank</td>
</tr>
<tr>
<td>Ekasi</td>
<td></td>
</tr>
</tbody>
</table>

Live music experience preferences are important to understand audience segmentation based on experience as opposed to just ‘race’, age or gender. Around half of the online respondents preferred to experience live music events by either sitting quietly or dancing to the live music. About a third of the online respondents liked a bar at a live music event in order to have drinks while listening to the music. Most people surveyed in person at venues outside of Johannesburg liked to dance to the music and they also liked a bar at a live music event in order to have drinks while listening to the music.

Men were more likely to sit quietly and listen to the music (53% to 43%) and women were more likely to want to dance to the music (58% to 36%). People who identified themselves as White and Asian most preferred to sit quietly and listen to the music and people who identified themselves as Black and Coloured most preferred to dance to the music. All ‘races’ except people who identified themselves as Asian liked a bar at a live music event in order to have drinks while listening to the music.

Some of the venues have started to target their audiences with different experience offerings. For example, The Orbit informally identifies their audiences according to different experiences such as dinner-and-a-show or special occasions such as anniversaries. Packages based on experience will market the artists performing but also the experience benefits i.e. celebrate your special occasion with us with an intimate performance with (the artist), thee-course meal and free bottle of champagne. The venue could attract new audiences by introducing more experience packages. For example, this research indicates a preference among women to dance at live music events as well as attending with their friends, so for standing-only live music events, The Orbit could target women with incentives to attend as a group i.e. Ladies night at The Orbit, bring three friends and get your ticket for free.

Experience preferences are also important for determining the layout of the venue. This research indicates a preference for dancing and sitting quietly at live music events, so the case study venues should provide both areas for sitting and dancing at events. Furthermore, a bar is important to the audience, as is the connection with the artist, therefore a bar should be placed in the venue but not a distraction to the main performance space.
3.4 Authentic Diversity of Audience

Following on from the authenticity findings, there was one insight which was quite specific to the South African context resultant of racial legacies of apartheid. All qualitative and quantitative respondents were asked a series of open-ended questions about how open they perceived live music venues were to all ‘races’.

**Younger Audiences**

There was a variety of responses from the 18-to-25-year-old interviewees and follow up questions were asked to draw out their insight, however five out of the seven respondents preferred an authentically diverse audience at live music events. They preferred not to attend ‘race-dominant’ events but rather liked diverse audiences who authentically interacted with each other or were like-minded. They did not like live music events where the different ‘races’ didn’t interact or there was a token White person in a Black-dominant audience or vice versa.

This is best illustrated in some of the remarks. Polly remarked ‘I wouldn’t enjoy going into a ‘race-dominated’ event. I like to go to a diverse event with different acts on different stages, you know you are going to get a diverse crowd rather than attending one performer where you already know what the audience is going to be like’.

Ntombenhle added ‘I mean I think it’s nice to have like a mix and I would notice if it’s like mostly White but I don’t think it would make me uncomfortable, because I’m in those spaces quite a lot with work. If there were three Black people at the event, we might joke about it like ‘oh, it’s so White’.

While there was an overwhelming sense that the interviewees seek out venues with an authentically diverse audience, this appeared to be specific to their perceptions about Johannesburg venues. The respondents felt Johannesburg was different than other cities such as Pretoria and Cape Town in terms of young audiences from different ‘races’ mixing more authentically. Some perceived that this was due to Johannesburg people being more like-minded regardless of ‘race’. There still seemed to be a lack of comfort in attending live music in venues.
in Cape Town and Pretoria. Nzolo commented ‘I think I’d be less comfortable going to Pretoria, because I’m used to the Joburg crowd. You can’t really break the social barriers – sometimes - when you get to places and it becomes quite hard. It’s just that fear and the discomfort would be a barrier’\textsuperscript{cxxxii}. Lesedi added ‘I think in Johannesburg I can go anywhere. And then if you say ‘there’s and event in Pretoria’ I’d be like ‘no thanks’. I think, I’d certainly feel restricted in terms of my ‘race’ if I were to go to Pretoria\textsuperscript{cxxxiii}. Ntombenhle said ‘Joburg is like, even though the ‘race’ stuff is still here, I feel like people are a bit more comfortable with accessing and going beyond those lines. I don’t feel the same in Cape Town’\textsuperscript{cxxxiv}.

So while we have established that the audience’s ‘race’ may still be important in other locations which warrants further study, perceived social class appeared more of a consideration for the respondents in terms of whether they felt the venue was open to them. This was clear in the earlier discussion about the perceived lack of authenticity at venues in the northern suburbs. Lesedi remarked on this ‘I think when it comes to venues, I think class is a more significant determinant of whether or not you’re welcome in a place these days’ (Lesedi, 2014).

**Concerts SA Audiences**

Perceptions about ‘race’ was also explored in the quantitative research to explore how comfortable audiences were with mixing at live music events. The online respondents were asked “Do you feel all live music venues and locations are open to all ‘races’ in Gauteng?” Their open-ended comments were assigned to a Yes or No response and then analysed by gender, ‘race’ and age.

**Table 8 Online Respondents’ Views About Venue Openness**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>45</td>
<td>42</td>
</tr>
<tr>
<td>Female</td>
<td>60</td>
<td>25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>‘Race’</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black</td>
<td>54</td>
<td>42</td>
</tr>
<tr>
<td>White</td>
<td>29</td>
<td>14</td>
</tr>
<tr>
<td>Coloured</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>Asian</td>
<td>1</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-20</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>21-29</td>
<td>51</td>
<td>28</td>
</tr>
<tr>
<td>30-39</td>
<td>24</td>
<td>18</td>
</tr>
<tr>
<td>40-49</td>
<td>14</td>
<td>8</td>
</tr>
<tr>
<td>50-59</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Over 60</td>
<td>9</td>
<td>1</td>
</tr>
</tbody>
</table>
While there was a slight skew to online respondents believing all venues were open to all ‘races’ in Gauteng, there were many people who felt they weren’t. Below is a summary of some of the comments.

- People of different ‘races’ don’t like feeling like a token ‘race’ in audiences.
- I feel some venues are inclusive of all ‘races’ but not social classes.
- Some venues intentionally target/cater to some ‘races’ over others.
- They might be officially open but sometimes the treatment and experience will show otherwise.
- Mostly, segregation is by income because of ticket and other cost factors, but great coincidence of class/racial fault-lines.
- No, because White people have the economic upper-hand, so Black people often choose places according to what they can afford.
- No, there’s certain areas and events where I don’t feel safe or welcome as a Black man
- No. South African audiences are still immature and segregate themselves according to colour.
- Nope, some places racially discriminate because of the type of people that hang out there.
- Not all locations feel open to all based on access, income and ‘race’.
- Not really, there are places that are exclusive of other people not by an explicit denial of entry but by the location and the demographic they seem to look for - socioeconomic exclusion is what I mean.
- They are but it depends largely on people’s perceptions.
- They are ‘open’ but in different ways. MonteCasino caters from those with money and those with transport. One does not need to have a car to go the Market Theatre. The shows are at a ‘taxi friendly’ time.
- They are open, but audiences do not mix much.
- Yes, but often events are marketed to specific groups and others are excluded because they are unaware of events.

Of the eighteen people who responded to this question during the in-person surveying, twelve people felt Gauteng venues were open to all ‘races’ and six felt they weren’t. Below are some of the comments from the people surveyed at venues outside Johannesburg.

- Depends on the genre and artist performing.
- Not directly, but some exclude people based on the pricing or location.
- Some locations such as Greenside don’t feel open to Black South Africans.
- Depends on the genre of music, but generally it is open to all ‘races’.
- No, I think most live music shows target working people with their own transport and this has a negative impact on previously disadvantaged people.
- No, there are factors such as culture and how we relate to music according to the different ‘races’.
• There are certain spaces that aren’t open to all ‘races’. For example, a venue in Johannesburg is primarily for a White Afrikaans audience and musicians. They aren’t open to having Black South Africans performing there from the looks of things.
• Yes, I have never experienced ‘race’ as a barrier to experience live music, however I have felt uncomfortable in a crowd.
• Yes, there are always different racial groups.

3.5 Uniqueness

Younger People

A common thread through all of the 18-to-25-year-old interviews was their search for uniqueness in the venue, experience and artists. As discussed earlier, there was a very strong rejection of live music and culture they perceived they experience in Sandton and Johannesburg’s northern suburbs. They perceived that the location, its venues and audiences were money-led, less creative and not unique.

Ntombenhle and Lethabo both liked to attend live music in unconventional and new spaces. Lethabo commented ‘I like warehouse spaces, which are completely unique and different like Constitution Hill or parking spaces – like non-traditional spaces’\textsuperscript{cxxxv}. Ntombenhle added ‘I really like venues that are a bit different to the obvious venues, in Maboneng or Braamfontein. I like a different space but still in the city’\textsuperscript{cxxxvi}.

A strong sense of individual identity or self-identity was evident among all of the young people I interviewed. This could be seen in Ntombenhle and Lethabo’s search for new spaces and experiences which had yet to be discovered by the masses. There is a slight contradiction to their view that spaces in the northern suburbs are exclusive and not accessible based on money, when they are also seeking exclusivity in spaces not open to the masses. Polly and Nomsa’s rejection of venues in Sandton with strict dress codes demonstrated their desire for unrestricted freedom of expression in appearance. The 2014 Pondering Panda Youth Report illustrated that 60% of young South Africans felt it was more important to be different than to fit in with their friends. Furthermore, they felt trustworthiness was the most important characteristic in their friends over popularity or fun\textsuperscript{cxxxvii}. These insights support the findings which uncovered the importance of authenticity and trust in the venue, artist and audience as well as a desire to cultivate their self-identity as opposed to following popular trends. Nuttall adds to this discussion in her book Entanglement exploring South Africa’s Y-Culture, ‘selfhood and subjectivity can no longer be interpreted as merely inscriptions of broader institutional and political forces; instead, an increased self-consciousness of the fashioning of human identity as a manipulable, artful process’\textsuperscript{cxxxviii}.

Artists, promoters and venues should therefore strive for uniqueness in their offering to younger audiences whether it takes the form of the space, the selection of artists on the line-up or the supporting social media strategy which offers unique ways of connecting with the artists and their fellow audience.
3.6 Concerts SA Audiences’ Preferences

The quantitative and in-person surveys explored further audience preferences than the qualitative focus on younger audiences.

**Attendance Frequency**

Increasing existing audiences’ attendance frequency and average spend per visit are important audience development strategies to ensure venues’ long-term financial sustainability. The Chartered Institute of Marketing suggests that it can cost between four and ten times more to acquire a new customer than to keep an existing customer\(^{\text{cxxxiii}}\), therefore venues must have strategies in place which encourage greater loyalty.

Almost 30% of Concerts SA’s online respondents attended live music a couple of times a year, while 30% attended once a month. People surveyed in person at venues outside of Johannesburg attended live music once a month, followed by a couple of times a year.

Men tend to me more frequent attenders than women with 46% of female online respondents attending a couple of times a year to 28% of men. 28% of online male respondents were likely to attend once (or more than once) a week, while only 14% of women were likely to attend that frequently. All racial groups were most likely to attend live music a couple of times a year except people who identify themselves as White who are most likely to attend once a month.

People under the age of 30 were most likely to attend live music a couple of times per year, while people between the 30 and 50 years attended once a month. The most loyal online respondents appeared to be over 60’s who attended once a week. While this survey highlights that the Concerts
SA audience is quite loyal, it does conflict a little with the BASA Artstrack No.6 report which suggests South Africans attend live music events less frequently.

Table 9 Online Respondents’ Attendance Frequency ‘Race’ Comparison

<table>
<thead>
<tr>
<th>How often do you see live music?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couple of times a year</td>
<td>33.33</td>
<td>44.17</td>
<td>56.25</td>
<td>28.85</td>
</tr>
<tr>
<td>More than once a week</td>
<td>0.00</td>
<td>5.00</td>
<td>12.50</td>
<td>13.46</td>
</tr>
<tr>
<td>Once a month</td>
<td>16.67</td>
<td>27.50</td>
<td>12.50</td>
<td>30.77</td>
</tr>
<tr>
<td>Once a week</td>
<td>0.00</td>
<td>13.33</td>
<td>12.50</td>
<td>17.31</td>
</tr>
<tr>
<td>Once a year</td>
<td>16.67</td>
<td>3.33</td>
<td>6.25</td>
<td>1.92</td>
</tr>
<tr>
<td>Other</td>
<td>33.33</td>
<td>6.67</td>
<td>0.00</td>
<td>7.69</td>
</tr>
</tbody>
</table>

Table 10 Online Respondents’ Attendance Frequency Age Comparison

<table>
<thead>
<tr>
<th>How often do you see live music?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couple of times a year</td>
<td>78.57</td>
<td>45.45</td>
<td>27.78</td>
<td>26.92</td>
<td>44.44</td>
<td>15.38</td>
</tr>
<tr>
<td>More than once a week</td>
<td>0.00</td>
<td>5.68</td>
<td>9.26</td>
<td>7.69</td>
<td>16.67</td>
<td>7.69</td>
</tr>
<tr>
<td>Once a month</td>
<td>7.14</td>
<td>25.00</td>
<td>35.19</td>
<td>42.31</td>
<td>27.78</td>
<td>30.77</td>
</tr>
<tr>
<td>Once a week</td>
<td>7.14</td>
<td>12.50</td>
<td>16.67</td>
<td>7.69</td>
<td>11.11</td>
<td>38.46</td>
</tr>
<tr>
<td>Once a year</td>
<td>7.14</td>
<td>3.41</td>
<td>3.70</td>
<td>3.85</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>7.95</td>
<td>7.41</td>
<td>11.54</td>
<td>0.00</td>
<td>7.69</td>
</tr>
</tbody>
</table>

Preferred Days/Evenings

The most preferred time to attend live music for the online respondents is Saturday night (28%) followed by Friday night (23%) and Saturday afternoons (15%). People surveyed in person at venues outside of Johannesburg preferred Saturday afternoons, followed by Saturday and Friday nights.

Men and women both preferred to attend live music on Saturday and Friday nights, however women were slightly more inclined to attend live music on Saturday or Sunday afternoons than men. There were some differences in preferred days and evenings to see live music among racial groups. Asian and Coloured respondents preferred Saturday nights, while Black respondents preferred Friday nights. White respondents equally preferred Friday and Saturday nights to attend live music.
Chart 7 Online Respondents’ Preferred Days/Evenings

Table 11 Online Respondents’ Preferred Evenings/Days ‘Race’ Comparison

<table>
<thead>
<tr>
<th>When do you like to see live music?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friday nights</td>
<td>0.00</td>
<td>26.67</td>
<td>0.00</td>
<td>25.00</td>
</tr>
<tr>
<td>Saturday afternoons</td>
<td>16.67</td>
<td>19.17</td>
<td>12.50</td>
<td>9.62</td>
</tr>
<tr>
<td>Saturday nights</td>
<td>83.33</td>
<td>25.83</td>
<td>37.50</td>
<td>25.00</td>
</tr>
<tr>
<td>Sunday afternoons</td>
<td>0.00</td>
<td>10.83</td>
<td>6.25</td>
<td>7.69</td>
</tr>
<tr>
<td>Weekday evenings</td>
<td>0.00</td>
<td>5.83</td>
<td>25.00</td>
<td>5.77</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>11.67</td>
<td>18.75</td>
<td>25.00</td>
</tr>
</tbody>
</table>

Table 12 Online Respondents’ Preferred Evenings/Days Age Comparison

<table>
<thead>
<tr>
<th>When do you like to see live music?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friday nights</td>
<td>21.43</td>
<td>19.32</td>
<td>27.78</td>
<td>30.77</td>
<td>16.67</td>
<td>30.77</td>
</tr>
<tr>
<td>Saturday afternoons</td>
<td>35.71</td>
<td>18.18</td>
<td>9.26</td>
<td>15.38</td>
<td>5.56</td>
<td>15.38</td>
</tr>
<tr>
<td>Saturday nights</td>
<td>35.71</td>
<td>31.82</td>
<td>27.78</td>
<td>19.23</td>
<td>33.33</td>
<td>0.00</td>
</tr>
<tr>
<td>Sunday afternoons</td>
<td>0.00</td>
<td>12.50</td>
<td>5.56</td>
<td>7.69</td>
<td>5.56</td>
<td>15.38</td>
</tr>
<tr>
<td>Weekday evenings</td>
<td>7.14</td>
<td>5.68</td>
<td>7.41</td>
<td>11.54</td>
<td>5.56</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>12.50</td>
<td>22.22</td>
<td>15.38</td>
<td>33.33</td>
<td>38.46</td>
</tr>
</tbody>
</table>
There were some differences across age groups in the days/evenings they preferred to attend live music. 18-to-20-year-olds liked to equally attend on Saturday afternoons or evenings. While 21-to-29-year-olds and 50-to-59-year-olds preferred Saturday evenings. With most of the Concerts SA audience preferring to attend live music on the weekend, new audience development strategies could be trialled on not-peak week-day evenings in many of the venues. For example, student or under 25’s events could be trialled on weeknights with a different offering without affecting peak evenings. Alternatively, exploring live music formats which combine other art forms could attract new audiences to live music from other popular artforms such film or spoken word/poetry.

**Live Music Spend**

Over half of the Concerts SA online respondents indicated they were happy to spend over R200 and over for a live one-off music event, with 36% happy to spend either R100 or R150. People surveyed in person at venues outside of Johannesburg preferred to spend less on live music events than Johannesburg audiences with the most popular amount cited R100, followed by R150 and R200.

There was not a great difference in spending patterns between men and women online respondents, however women were happy to spend slightly more than men on live music with 41% of women citing over 200 compared with 33% of men.
All racial groups were happy to spend over R200 on a one-off live music event, however 45% of Black respondents compared with 30% of White, 17% of Asian and 13% of Coloured respondents were willing to spend R150 and under. All age groups, except over 60’s, were willing to pay over R200 for a one-off live music event. While these findings demonstrate that Concerts SA audiences assign value to live music, it may not be reflective of a larger and more diverse audience sample. Furthermore, while they are willing to pay R200 for a one-off live music event, they may be more comfortable with lower door prices for more regular live music events. It is advised for venues to monitor their average ticket spend prices and conduct their own audience research to determine the right ticketing strategy. Dynamic ticketing strategies will be explored in the recommendations section of this report, however the research does indicate that South Africans do place monetary value on live music.

Table 13 Online Respondents’ Preferred Spend ‘Race’ Comparison

<table>
<thead>
<tr>
<th>How much are you prepared to spend on a one-off live music event?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R50</td>
<td>0.00</td>
<td>3.33</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>R100</td>
<td>0.00</td>
<td>15.00</td>
<td>6.25</td>
<td>17.31</td>
</tr>
<tr>
<td>R150</td>
<td>16.67</td>
<td>26.67</td>
<td>6.25</td>
<td>13.46</td>
</tr>
<tr>
<td>R200</td>
<td>16.67</td>
<td>15.00</td>
<td>25.00</td>
<td>21.15</td>
</tr>
<tr>
<td>Over R200</td>
<td>50.00</td>
<td>35.00</td>
<td>56.25</td>
<td>42.31</td>
</tr>
<tr>
<td>Other</td>
<td>16.67</td>
<td>4.17</td>
<td>6.25</td>
<td>5.77</td>
</tr>
<tr>
<td>Free</td>
<td>0.00</td>
<td>0.83</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Table 14 Online Respondents’ Preferred Spend Age Comparison

<table>
<thead>
<tr>
<th>How much are you prepared to spend on a one-off live music event?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R50</td>
<td>0.00</td>
<td>3.41</td>
<td>1.85</td>
<td>7.69</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>R100</td>
<td>14.29</td>
<td>17.05</td>
<td>12.96</td>
<td>19.23</td>
<td>11.11</td>
<td>7.69</td>
</tr>
<tr>
<td>R150</td>
<td>7.14</td>
<td>25.00</td>
<td>18.52</td>
<td>15.38</td>
<td>22.22</td>
<td>23.08</td>
</tr>
<tr>
<td>R200</td>
<td>28.57</td>
<td>10.23</td>
<td>20.37</td>
<td>11.54</td>
<td>27.78</td>
<td>38.46</td>
</tr>
<tr>
<td>Over R200</td>
<td>50.00</td>
<td>35.23</td>
<td>38.89</td>
<td>38.46</td>
<td>33.33</td>
<td>30.77</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>7.95</td>
<td>5.56</td>
<td>7.69</td>
<td>5.56</td>
<td>0.00</td>
</tr>
<tr>
<td>Free</td>
<td>0.00</td>
<td>1.14</td>
<td>1.85</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
3.5 Barriers to Attendance

Understanding the institutional and environmental barriers to attendance could provide practical information which helps venues adapt their audience experience from pricing structure and timing, to their customer service\textsuperscript{xvii}. Understanding psychological barriers, to attendance, which are categorised by Dodd and Sandell as a) personal and social and b) relating to perceptions and awareness, is crucial in the South African context which is still affected by the spatial and racial legacies of apartheid\textsuperscript{xviii}.

Barriers to attending live music events were explored in open-ended questions during the in-depth interviews with young people and venue staff as well as in the quantitative surveys of Concerts SA audiences.

Younger Audiences

Price sensitivity and access to disposable income were mentioned by six out of the seven of the 18-to-25-year-olds interviewed as a potential barrier to attending live music more often. This barrier was also highlighted by 57% of the 18-to-20-year-old respondents of the quantitative survey and 55% of 21-to-29-year-olds. A survey with a larger sample of live music audiences in South Africa could determine the different levels of price sensitivity for each of the LSM groups. This study indicated that young people from the lower LSM groups all cited ticket and/or refreshment prices as potential barriers to attending live music more often, however this was also cited for all young people. This is not an unexpected finding considering young people earn less and are most affected by unemployment in South Africa.

All of the young people interviewed were Black, however to examine whether White young people were similarly affected by price sensitivity as Black young people, the quantitative findings were analysed by age. None of the 18-to-20-year-old respondents who identified themselves as White, highlighted price as a barrier to live music attendance, while 42% of respondents from the same age bracket who identified as Black saw price as a barrier. Lack of disposable income remains a significant personal and social barrier to live music consumption in South Africa and economic inequality exists among ‘races’. For example, the nine per cent of the South African population that is White is richer per capita than the 80% of the population that is Black\textsuperscript{xix}. Alongside racial economic inequality, 50% percent of 18-to-24-year-olds are still living in poverty\textsuperscript{xx}. These two issues must be considered by venues looking to attract a diverse, young audience in their pricing and audience development strategies to overcome institutional barriers.

From the interviews conducted with young people, 90% indicated they placed monetary value on live music performances by suggesting they would be willing to pay between R50 and R400 to attend a one-off live music event. These findings are supported by the quantitative findings which indicates that 18-to-20-year-old respondents would spend from R150 to over R200 for a live music event. No young interviewee preferred free events, in fact Polly preferred not to attend free events as she perceived them to be unsafe. ‘Free events open to the public are going to be too packed and security might be a problem. Anyone can access it, even people who come to hustle\textsuperscript{xxi}.

One of the venue owners saw young audiences’ lack of disposable income as a barrier to their attendance at their venue. The Orbit’s Aymeric said ‘I have an economic concern with young people not always being able to bring you the type of income that you expect for the type of
energy and economic investment you put it.’ This appeared to be a reason The Orbit didn’t see 18-to-25-year-olds as their primary target audience even though they are located right in the heart of youth heavy location, Braamfontein. It appeared that The Orbit had unintentionally created institutional barriers to young audiences through their ticket, food and beverage pricing, however when future plans for youth audiences were explored with Aymeric, he appeared open to strategies to attract more young people\textsuperscript{cxiv}. While The Orbit has created an institutional barrier with their pricing strategy, Afrikan Freedom Station tried to remove disposable income barriers. ‘I know that people don’t have money so we don’t take money at the door we collect it once the show has started and I often say that I know what is to be young and I don’t want money to stand between the person and the art\textsuperscript{cxv}. Young people’s purchasing power may not be at the same level as more mature markets, however they are willing to pay to see live music and are not just attracted to free events. They also represent a very large market, in terms of population numbers, so if venues could attract larger audiences at a lower price per capita there could be scope for more inclusive audience growth long-term.

The young people interviewed also expressed a desire to attend live music performances more frequently than they currently do, that is, on average every two and half months. In fact, the BASA Artstrack No. 6 report found that young people under 25 years attended live music significantly more often than people over 50 years\textsuperscript{cxvi}. Looking at this insight alongside their willingness to pay for live music, presents a potential opportunity for venue owners. If young people are willing to attend live music more frequently at a lower price point than mature audiences who attend less frequently, both audiences could be just as valuable long-term. This consumption pattern can be seen in other parts of South African and African society, where disposable income is low, but appreciation and willingness to consume is high. Fashion and smartphone brands in South Africa recognise the potential in the large youth market and adapt their price and service offerings to secure long-term loyalty with them. A 2012 report from the McKinsey’s Africa Consumer Insights Center, The rise of the African consumer, argues that the consumption habits of the youth are very different to that of their elders. For example, they report that 67% of 16-to-24-year-olds search for information online compared with the 45-and-over age group, and they are typically the first people they know to try new things. Loyalty and quality are also important to the new African consumer\textsuperscript{cxvii}. Consumer trends can’t be directly applied to live music attendance, however these insights could inform long-term audience development programmes targeting young people.

Accessibility including a lack of public transport and personal safety were identified as significant physical barriers to attending live music by the 18-to-25-year-old interviewees and venues. Four out of seven of the young interviewees identified lack of public transport as a major barrier. Lack of public transport at night also created a perceived lack of personal safety for them. In addition to limited affordable public transport and a higher than average incidence of crime in Johannesburg, the city is a large, spread out urban space with much of the population living in former apartheid-assigned townships like Soweto. To travel into venues in central Johannesburg, or from central Johannesburg to venues in Soweto, takes in excess of 45 minutes by private car. Furthermore, the affordable public transport system of mini taxis has limited services available after 8pm when many of the live music events take place. Based on their SAARF LSM profiles, six out of seven of the young people being interviewed rely on mini taxis as their primary mode of transport. Modisaotsile said ‘there’s no transport so it’s the middle class and people with money that can afford to travel to attend events. I believe people would come if transport was available\textsuperscript{cxviii}. The Orbit’s owner Aymeric echoed Modisaotsile’s view ‘travel can be a barrier for
people where the public transport is scarce". Spatial legacies of the apartheid era’s residential planning, lack of affordable transport and perceived lack of personal safety have huge implications for audiences’ movement across the city and potential audience development for live music venues. The racial make-up of live music audiences is also affected by this lack of movement across the city, particularly for venues located in residential areas, such as Soweto, which are largely dominated by one ‘race’.

Another apartheid legacy this study sought to explore was the degree to which ‘race’ was seen as barrier to attendance. For this part of the research, Dodd and Sandell’s perception and awareness barriers were referenced. As well as understanding young people’s perceptions, the degree to which venues felt their spaces were open, attracting, all ‘races’ was explored. Finally, audience demographics were recorded at individual live music events during observation to determine whether their ambition of attracting diverse audiences was a reality.

This topic was investigated through a series of open-ended questions such as: do you feel all venues are open to all ‘races’?; does your venue attract a diverse crowd?; do you chose your live music venues based on the audience make-up?; and do you think about the racial make-up of the audience at live music events? These questions involved quite a lot of interrogation of the interviewees to encourage them to open up with honest opinions. As indicated earlier, the degree to which the interviewees were completely honest with the researcher could be a limitation of this research, however it is felt the researcher’s objectivity as a foreigner could have assisted with drawing out insights on a very sensitive subject.

All of the venues believed their space was open to all ‘races’ and attracted diverse audiences. When probed further on who they perceived were their core audience, two of the venues indicated that their primary audience identified themselves as Black. The other venues didn’t feel their audience was dominated by one ‘race’. I believe the racial make-up of the audience at venues is complex and not determined by one factor. For example, while the ambition of the Soweto Arts and Craft Fair is to attract a diverse audience from Sowetans and Johannesburg residents to international tourists, it was observed that the audience breakdown was 90% Black. The fair’s location could be seen as physical barrier to non-Black audiences who don’t reside in Soweto with the theatre located 45 minutes away from central Johannesburg.

Furthermore, project manager Simphiwe believed non-Black people may have the perception that they are not welcome or safe in Soweto. This is highlighted to show that although there is ambition to attract diverse audiences, the physical location and perception of not ‘belonging’ in that location, remain significant barriers for developing new live music audiences.

Another factor which appeared to create perception barriers to attending specific venues, is connected with the venue’s history and heritage. For example, Niki’s Oasis was seen by the young people as an important venue of cultural significance for the Black community. Nomsa commented ‘It’s got a very nice, old school feeling and the history of the place makes it feel that way’. Ntombenhle spoke about the venue’s location in Newtown which was where many of the de-segregated live music venues began to flourish post-apartheid. ‘I like the fact that Niki’s Oasis sort of survived Newtown. Many spaces have closed down and places have just become so boring, but Nikki’s has always been there. It’s never changed, it hasn’t tried to be something different. So I find it authentic’. This cultural heritage is not shared by all ‘races’ in Johannesburg and therefore could create a perception barrier that the place is “not for me.” New venues such as the Soweto Theatre and The Orbit may be seen as more neutral, and therefore appeal to all ‘races’.
The final two barriers worth highlighting are institutional, that is created by the venue itself. Two of the young respondents said venues lack of consistent programming created barriers to attendance. For example, Lesedi mentioned that he used to go to live music more frequently in 2013 when there was live music every Friday night at the Puma Social Club and Alexander Theatre. Similarly, Lethabo mentioned she liked Bassline as a venue to see live music, however programming was not always consistent and therefore a barrier to attending. This was also highlighted by 21% of the 18-to-20 and 26% of the 21-to-29-year-old quantitative respondents who identify a lack of consistent programming as a barrier to attending live music.

The final institutional barrier was a lack of promotion of live music events. Three out of seven of the young people interviewed believed venues were not sufficiently promoting their live music events. They also felt the promotion was inconsistent and not timely. Lethabo noted *there is a lack of promotion of gigs so you often miss things as the promotion is too last minute* and Polly commented on one of the case study venues *I don’t feel they communicate enough with us to let the outside world know what’s going on there. Most of the time it’s a friend telling me something is going on or I bump into it on Facebook but not enough as they only post one post per gig so you often miss things and there is no follow up*.

**Concerts SA Audiences**

Concerts SA’s audience were asked to identify barriers to their attendance at live music events in both the online and in-person surveys. Price was the main barrier to online respondents attending more live music (45%), followed by lack of consistent live music events (30%). Location proximity, lack of transport and lack of security were all considered barriers to attendance by a quarter of the online respondents. People surveyed in person at venues outside of Johannesburg cited lack of transport, location proximity and a lack of security as their top three barriers to attendance. These physical barriers to attendance must be a consideration for promoters looking to host events outside of Johannesburg. For example, additional security and lighting may be required for evening events as well as transport partners.

**Chart 9 Online Respondents’ Barriers**
Lack of transport (34% to 18%) and lack of security (28% to 21%) were both more of a barrier to attendance to women than men. Women were more sensitive to price than men (51% to 39%), while men considered a lack of consistent live music more of a barrier than women (40% to 21%). These barriers can be broken down by emphasizing how you are addressing theses in the marketing. For example, it would be important to mention secure parking in marketing directed at women, and messages about the frequency of events i.e. live music six evenings a week for men.

There were some differences in barriers to attendance across ‘races’. Black respondents were most concerned with price, followed by a lack of transport. This finding could be explained by the greater concentration of people who identify themselves as Black having less disposable income than other ‘races’ as well as relying more on public taxis which don’t operate 24-hours-a-day. White respondents cited a lack of consistent music events as their main barrier to attendance and were most concerned with a lack of security than any of the other ‘races’.

Table 15 Online Respondents’ Barriers ‘Race’ Comparison

<table>
<thead>
<tr>
<th>What are the main barriers to you attending live music?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of transport</td>
<td>16.67</td>
<td>38.33</td>
<td>12.50</td>
<td>5.77</td>
</tr>
<tr>
<td>Location proximity</td>
<td>33.33</td>
<td>29.17</td>
<td>37.50</td>
<td>15.38</td>
</tr>
<tr>
<td>Lack of security</td>
<td>16.67</td>
<td>25.00</td>
<td>18.75</td>
<td>30.77</td>
</tr>
<tr>
<td>Price</td>
<td>33.33</td>
<td>54.17</td>
<td>43.75</td>
<td>30.77</td>
</tr>
<tr>
<td>Lack of consistent live music events</td>
<td>33.33</td>
<td>24.17</td>
<td>43.75</td>
<td>38.46</td>
</tr>
</tbody>
</table>

Table 16 Online Respondents’ Barriers ‘Race’ Comparison

<table>
<thead>
<tr>
<th>What are the main barriers to you attending live music?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of transport</td>
<td>71.43</td>
<td>42.05</td>
<td>14.81</td>
<td>0.00</td>
<td>0.00</td>
<td>7.69</td>
</tr>
<tr>
<td>Location proximity</td>
<td>14.29</td>
<td>32.95</td>
<td>27.78</td>
<td>23.08</td>
<td>16.67</td>
<td>15.38</td>
</tr>
<tr>
<td>Lack of security</td>
<td>21.43</td>
<td>23.86</td>
<td>24.07</td>
<td>26.92</td>
<td>22.22</td>
<td>38.46</td>
</tr>
<tr>
<td>Price</td>
<td>57.14</td>
<td>54.55</td>
<td>42.59</td>
<td>34.62</td>
<td>33.33</td>
<td>15.38</td>
</tr>
<tr>
<td>Lack of consistent live music events</td>
<td>21.43</td>
<td>26.14</td>
<td>35.19</td>
<td>38.46</td>
<td>44.44</td>
<td>7.69</td>
</tr>
</tbody>
</table>
Barriers did differ across different age groups with people under 30 were most affected by a lack of transport, while over 60’s cited a lack of security as their main barrier to attendance. Venues looking to attract young audiences must be mindful of transport challenges when selecting the location and timing of events.

The majority of Concerts SA’s online respondents drove their car to live music events, with 22% taking public taxis, 15% private cabs and 20% taking a bus, train or walking. While all genders and ‘races’ were most likely to drive to a live music event, there were some differences in usage of other transport. Women took more private cabs than men, which may be linked with their greater concern for security. All racial groups were most likely to drive a live music event, however people who identified themselves as Black were more likely to take public transport like taxis, buses or trains than any of the other racial groups. For example, one third of Black respondents took taxis to live music events compared with 0% Asian, 6% Coloured and 6% White respondents. Young audiences (under 30 years) were also much more likely to use public taxis to live music events.

### Table 17 Online Respondents’ Transport Modes Age Comparison

<table>
<thead>
<tr>
<th>Which mode of transport do you use to get to live music events?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive your car</td>
<td>14.29</td>
<td>59.09</td>
<td>81.48</td>
<td>96.15</td>
<td>100.00</td>
<td>92.31</td>
</tr>
<tr>
<td>Taxis</td>
<td>50.00</td>
<td>35.23</td>
<td>9.26</td>
<td>3.85</td>
<td>5.56</td>
<td>7.69</td>
</tr>
<tr>
<td>Private cab</td>
<td>21.43</td>
<td>20.45</td>
<td>16.67</td>
<td>3.85</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Buses</td>
<td>7.14</td>
<td>6.82</td>
<td>11.11</td>
<td>0.00</td>
<td>5.56</td>
<td>0.00</td>
</tr>
<tr>
<td>Train</td>
<td>0.00</td>
<td>10.23</td>
<td>3.70</td>
<td>0.00</td>
<td>0.00</td>
<td>7.69</td>
</tr>
<tr>
<td>Walk, only go to venues that I can walk to</td>
<td>14.29</td>
<td>10.23</td>
<td>5.56</td>
<td>0.00</td>
<td>5.56</td>
<td>0.00</td>
</tr>
</tbody>
</table>

This reliance on driving to venues is symptomatic of an inadequate public transport system in Johannesburg. Free and secure parking located close to the venue is an extremely important consideration for venue owners and promoters, however it could be restricting alcohol beverage sales. Exploring potential partnerships with private taxi companies such as Uber could be a good long-term strategy for increasing the average beverage spend of audiences. Similarly, for attracting younger audiences more reliant on public transport, location and timing are greater considerations when planning live music events. Long-term collective industry pressure on the Government and commercial operators to improve access to affordable night public transport services will also be important to breaking down this barrier.

As well as asking a closed-ended question about barriers to attendance, the online respondents were asked an open-ended question about whether there any live music venues they felt uncomfortable in and why. The following were barriers mentioned by one or more of the respondents:

- overcrowded spaces;
- noisy spaces, where music wasn’t the focus;
spaces with bad sound;
places where people were drinking too much;
places in the Northern Johannesburg suburbs, such as Sandton, where they felt it wasn’t their crowd;
outdoor spaces due to a sense of overcrowding and lack of security
Newtown, as it seemed unsafe;
clubs/nightclubs as they were perceived not to be about the music and too loud with too much drinking;
stadiums, as they were perceived to be too big and not intimate;
places with a general lack of security and accessibility;
central Johannesburg, as it was perceived unsafe; and
out-dated venues.

3.6 Venues

As well as exploring young audiences’ motivations and consumption of live music, this study sought to understand the case study venues’ attitudes towards, and knowledge of, their audiences; their understanding and practice of audience development, level of resources dedicated to marketing and audience development; and finally their views on what could be done to address audience development in South Africa.

3.6.1 Multi-disciplinarians

The researcher had planned to conduct in-depth interviews with the venue owner/general manager and the person responsible for marketing and audience development, however it soon became clear that seven out of eight of the venues did not have a dedicated resource for marketing and audience development. Seven of the venue owners had multi-disciplinary roles holding responsibility for business development, operations, marketing and artistic programming. With the exception of the Soweto Theatre, which is a medium-sized venue with dedicated marketing, programming and operations staff, all of the other venues are considered small, accommodating up to 200 people. The 2010 Songlines report suggested that the live music circuit in South Africa is dominated by regular live performances at smaller venues (similar to the case study venues) and large-scale stadium concerts and festivals. The report highlighted a shortage of venues in the 800-1500 seat range which it judged as a ‘key sizing category for financial break-even when hosting an out-of-town act’\[cix\]. It could be argued that this lack of mid-scale venues, which have the resources for dedicated marketing and audience development positions, has created a shortage of specialist live music venue marketing professionals. Aymeric from The Orbit highlighted this challenge in his interview. ‘I’m not sure there are enough professionals who know how to market venues in South Africa and there is an absence of investment in the arts sector’\[cix\].

While many of the venues didn’t have specialist people dedicated to marketing and development, there was certainly a desire to have specialists in those roles in the organisation or through external partnerships. Most of the venues would like to have more resources dedicated to marketing and audience development, however their finances currently didn’t allow for it. Kwen from Afrikan Freedom Station said ‘I would like to have dedicated resource. It’s not enough that you only have me. I am in discussion with Jozi Unsigned as a marketing partner, they are from the same headspace and
they are quite skilled. It is acknowledged that the financial challenges of running venues could reduce their capacity to invest in marketing and audience development, investment appeared to be prioritised in other aspects on the venue, namely, artist programming and guaranteed fees for artists. For example, Niki’s Oasis appeared to have limited resources dedicated to marketing, however prioritised giving performers a guaranteed fee. Niki commented: ‘we want artists to take home at a guaranteed fee for their performance’. Aymeric from The Orbit also prioritised investment in the artists: ‘we wanted to create that environment where music and artists are respected when they perform. While we do try and accommodate our audiences we put artists first, put them at the centre and everything happens around them.

3.6.2 Rentschler’s Evolutionary Framework of the Arts Marketing Profession

Rentschler’s evolutionary framework was introduced earlier in the report to better understand how the arts marketing profession is regarded in the South African context. Rentschler proposed that the profession in the Global North progressed from the foundation period; to the professionalization period; to the discovery period; and finally to the innovation period.

It could be argued that the arts marketing profession among the case studies is largely sitting between the professionalization and discovery period. For example, seven out eight of the venues did not have dedicated marketing resources and marketing orientation had not fully embedded itself in the organisations. You might be able to argue that the larger venue, the Soweto Theatre, was sitting more comfortably in the innovation period with dedicated audience development and marketing resources. These venues should also be placed within the wider context of the live music sector in South Africa. The large commercial festivals and concerts could be operating in the innovation period, with dedicated marketing and publicity professionals working in the sector as well as a good understanding of, and focus on, their audiences through the use of sophisticated ticketing and database systems as well as established digital marketing and research strategies. This positions South Africa with an interesting dilemma which will be explored in the findings analysis chapter - how can the smaller, independent players learn from the larger promoters who are dominating the live music sector (in terms of audience numbers and revenue) in South Africa?

3.6.3 Artistically-led, Audience-focused

The concept of artistically-led, audience focused organisations, which was explored in the background section of this report, is a popular and current discussion in global arts marketing literature. This study applied Maitland’s audience focus grid and associated descriptors to map the case study venue in terms of their focus.

Maitland describes audience-led organisations:

- they understand audiences’ needs and motivations through conducting research;
- their main focus is fulfilling the needs of audiences;
- they segment their audiences and use tailored marketing for each group;
- they encourage loyalty;
- they understand they are not our audience’s first priority;
- they think marketing is the organisation’s major responsibility.

Maitland describes artistically-led organisations:
they believe their artistic offer is strong enough to attract audiences automatically;
• if audiences don’t come they are seen to be uneducated or to have unsophisticated tastes;
• they shouldn’t have to compete with audiences against leisure activities;
• they don’t know about their audiences through research;
• they adopt one approach to marketing to all audiences.

Finally, Maitland classifies artistically-led, audience-focused organisations as having the same traits as audience-focused organisations, however they seek to fulfil audience’s needs to meet the organisation’s own artistic objectives. To put this simply, being purely audience-focused and not artistically-led could lead to artistic programming based on audience demand only, rather than following an artistic strategy or identity. On the otherhand, to be purely artistically-led you are presenting live music which may or may not be attractive to the audience member which impacts on the sustainability of the venue. The venues were mapped on the grid below based on Maitland’s descriptors to determine whether the venues were more artistically or audience led.

<table>
<thead>
<tr>
<th>VISION</th>
<th>AUDIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTISTICALLY-</td>
<td>NARROW</td>
</tr>
<tr>
<td>LED</td>
<td>Artistic-led and peer-focused</td>
</tr>
<tr>
<td></td>
<td>The Orbit</td>
</tr>
<tr>
<td></td>
<td>Niki’s Oasis</td>
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<td>Lucky Bean</td>
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<td>AUDIENCE-LED</td>
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<td>Soweto Arts and Craft Fair</td>
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3.6.4 Audience Development Needs Clarification

Audience development is a relatively new Anglo-American term which has only just begun to be referenced in South Africa. The term has begun to appear in the latest government arts strategies such as the Mzansi Golden Economy, a government strategy that aims to reposition the cultural industries in South Africa, as well as being identified among skills demanded by industry research including the 2013 Songlines report. In 2013 BASA introduced arts development into their established professional development programme for the arts industry and the University of...
Witwatersrand began to integrate audience development into its post-graduate arts and cultural management degree. This being said, this research indicated that venue owners had different interpretations of what audience development is.

Kwena from the Afrikan Freedom Station suggested he wasn’t entirely sure what audience development was. ‘To me it’s once you make a connection it’s a lifelong commitment. For me audience development less as connecting people with music to more like growing a support base with some income’. Carl Johnson of the Soweto Theatre felt audience development was too reliant on models from the Global North which didn’t respond to South Africa’s context. He believed a customised, hybrid audience model developed is what venues need in South Africa. ‘You need to do surveys, you need someone with patience to slowly, develop and find out what people like. You must ensure you have a clean and robust audience database, customer relationship management is very important. I think on a lot of levels, the Market Theatre has shown the way in terms of best practice audience development in South Africa’.

Simphiwe Twala of Soweto Arts and Craft Fair indicated that he had heard the term recently at some professional training coordinated by Concerts SA. ‘It’s developing a network of people who will come to support, appreciate and spread the word. Audience development is about taking your product into new spaces and networks which you can’t reach’. The Soweto Theatre marketing manager Robert Motseko felt audience development was focused on the sustainability of the theatre and that marketing and audience development must work closely together. Live music promoter from Jozi Unsigned, Lindy Mtongana felt audience development was ‘partly about encouraging audiences to pay for music, but also increasing the size of the audience across the city so that artists and promoters can build sustainable careers in live music’. Owner of Iketleng, Sello Mokau, suggested that he had not come across the audience development term before.

While all of these definitions are valid, it demonstrates the lack of clarity in the sector on what audience development is and how to do it successfully. The fact that at least three of the case study venues could be considered more artistically-led might explain why an audience-focus, and subsequently, a formal audience development programme is not yet seen as a priority. In addition to this lack of understanding at a local level, the wider literature on audience development is not aligned, with many experts in the field developing their own slightly different definition as outlined in the background section of this report.

While there is a lack of awareness and practice of audience development, this research found a strong motivation from the venues to develop more skills in this area, however there were barriers preventing them from implementing formal programmes such as inadequate resources. A culture of informal audience research and segmentation was evident among some venues which will now be explored.

3.6.5 Informal Research and Segmentation

All of the venues indicated they had not undertaken formal audience research, however they were all confident that they understood and knew who their audiences are.

In terms of the type of informal research the venues conducted, there wasn’t a great deal of consistency across case studies. Both Afrikan Freedom Station and Soweto Arts and Craft Fair said they used Facebook’s free insights tool to understand their audience demographics and preferences. The Orbit and the Soweto Arts and Craft Fair both had regular face-to-face conversations or focus groups with their artist communities. Niki’s Oasis and Iketleng both had
informal conversations with their audiences. The Orbit prioritised informal research of their top bookers and spenders’ consumption behaviour including music taste, food and beverage preferences and attendance frequency\textsuperscript{clxxv}. All venues expressed a desire to do more formal surveying or questionnaires with their existing and potential audiences.

Promoter Jozi Unsigned has hosted live music events at Ikileleng and DA Venue and indicated most of what they know about their audiences is through personal interactions with them. Lindy commented: “at Ikileleng, people come up to us. They see us with a camera taking pictures and they often share their own stories about their love for jazz or the particular artist that we have brought to the venue. They also often ask for their picture to be taken with the artist. These conversations are very enlightening for us and have helped us adjust our pr strategy for future events.”

She added that similar interactions take place at DA Venue but they are fewer and far between as the audience is less engaged with the promoters and live music event. “If the band is not perceived to be famous, the DA Venue audience can be dismissive of them,” Lindy noted\textsuperscript{clxxv}

This study explored what audience information venues were capturing through their day-to-day interactions such as mailing list sign up forms on their website, phone bookings or in person exchanges at their live events. The venues’ data capturing patterns were also noted during observation. Six out of eight venues mentioned they had a mailing list, however it was not apparent how to join all venues’ mailing lists. A few venues had mailing lists on their websites which captured basic information including name, email, phone number and address, however several venues didn’t have a dedicated website. Other venues indicated they captured people’s details for their mailing list at the venue, however there wasn’t apparent attempts to capture further information about the audience when tickets were purchased or via surveying during observation. Finally, at one venue tickets were booked over the phone and while the researcher was asked for an email address, there wasn’t an attempt to sign up the audience member to a mailing list.

Seven out of eight venues don’t offer an online booking opportunity as they believed there isn’t a culture of pre-booking in South Africa. The larger venue, the Soweto Theatre, did use third-party online booking partners, however there wasn’t a culture of sharing audience data from promoters using their venue\textsuperscript{clxxvi}. Audience databases used by the venues are spreadsheets or basic databases which don’t allow for audience segmentation by purchasing behaviour or artistic preference\textsuperscript{clxxvii}.

As well as understanding how the venues were researching and capturing information about their audiences, they were asked an open-ended question about how they would describe their audience and what type of experience their audience receive at their venue. While it may have been unintentional to some degree, the venues described their audiences using different types of segmentation approaches including demographic, behavioural and benefit segmentation\textsuperscript{clxxviii}. All of the venues described their audience based on demographic segmentation including ‘race’, age, sex and perceived income level. The Orbit appeared to be using both behavioural segmentation, that is frequency of attendance, as well as benefit segmentation, where the audience is segmented based on the benefit they seek from the venue\textsuperscript{clxxix}. The Morris Hargreaves McIntyre motivation-led audience development model applied with the young people’s interviews is a form of benefit segmentation\textsuperscript{clxxx}. Here are examples of behavioural and benefit segmentation of The Orbit’s audience as described by Aymeric:

**Behavioural:** ‘We have regulars who are different to socialites and music lovers. They are people who are completely seduced by the venue from the start. It is a multi-purpose venue for them.’
**Benefit:** ‘There are a large number of couples that come here as a special occasion and there is a bit of romance about it. It’s as if they are coming to the Orbit to create memory and we like that as we want to create memories here.\(^{\text{clxxxi}}\)’

Morris Hargreaves McIntyre motivation-led audience development model could also be applied to one of the other venues who articulated their audience. Simphiwe from the Soweto Arts and Craft Fair described his audience based on their motivation to attend: ‘I describe my audience as conscious, open-minded and spirited people. They like authenticity and exclusivity - being different from the crowd which is reflected in everything about them from their fashion to music choice.’ Simphiwe indicated his audience has a deeper, more spiritual connection with his events and they seek out authenticity much like the young people interviewed\(^{\text{clxxii}}\).

Finally, Niki’s Oasis was observed to be segmenting their audience based on motivation. They have audiences who purely see the venue as a place for social interaction over dinner and drinks as well those audiences who have a deeper emotional connection with the venue. During the interview, Niki described one audience with a shared history with the venue. ‘Our main audience is Black men over 50 who don’t have to be home and looking after their children. Perhaps it could be a cultural behaviour specific to South Africa where men go and watch music together. If they invite the guys, they all call each other and say we are going to meet at Niki’s tonight.’ Niki added that these men have been coming frequently to her venue since it first opened in the post-apartheid 1990’s\(^{\text{clxxxiii}}\).

While the venues hold different levels of value in audience development, there was a common view among all that the sector needed to work collaboratively to build a larger live music audience.

**3.6.6 Attendance Culture**

All of the venues felt wider collaboration was needed to grow a culture of live music attendance at venues. Niki from Niki’s Oasis suggested there should be more collaboration such as the Concerts SA initiative which supports live music circuits and connects venues across South Africa. ‘I would not have known what other venues are doing if we had not come together in one room through Concerts SA. Competition is good for the sector, but if we all work together we can help each other grow\(^{\text{clxxxiv}}\).’

Aymeric from the Orbit suggested a wider public campaign encouraging audiences to support live music could help grow a culture of attendance. ‘A public campaign supporting live music could be very useful, as well as a way of accelerating the distribution of information about live music events on various platforms\(^{\text{clxxxv}}\).’

Simphiwe from the Soweto Arts and Craft Fair felt encouraging early exposure to live music and the arts was crucial for building future audiences and a culture of attendance. ‘“We like kids to mix with our audience because we want to develop our audience. The earlier you introduce them to the arts they grow with that culture, as well as a love and appreciation for arts”\(^{\text{clxxxvi}}\).’ Jozi Unsigned is one of the promoters delivering the Concerts SA schools programme which aims to grow young audiences by hosting live music events in schools. Lindy noted that while the programme is an important initiative, more consistency and frequency of the school events is needed to grow the live music audiences of tomorrow\(^{\text{clxxxvii}}\).

All of the venues expressed an interest in attracting young audiences, however two of the venues appeared to have the perception that 18-to-25-year-olds had not matured enough to appreciate the music offered at their venues. There was a view that people acquired music knowledge and appreciation in their 30’s. Niki from Niki’s Oasis said ‘I find with the 30-year-olds they are getting
serious about the music and have an ear for it. They come to listen to music and eat food. They invite their friends and come as groups. At the same time, some of the young people interviewed felt some venues were not open to them based on their age. Nomsa noted ‘I’d like to see a lot more jazz events for young people. I would really love to come to Kitchener’s, or one of these places in Braamfontein, on a Sunday for a chilled Jazz session, where young people can enjoy the type of jazz they play and enjoy’. Lesedi referred to one of the case study venues ‘when I went there with a couple of older folk it’s very different from when you go there as a young person. When you go there as a young person, you don’t feel as welcome. I don’t think young people are in their target market at all’. There appeared a slight disconnect between the young audiences and venue owners which may reflect a wider societal trend of generational mistrust. While the generational divide is a global phenomenon, its implications may be heightened in South Africa due to its recent history.

3.6.7 Skills Development and Specialism

There is a shortage of arts marketing and audience development skills in the live music sector with seven out of seven of the venues not having dedicated experts managing their marketing and audience development. There was demand for skills development and the cultivation of specialist professionals by all venues, however it didn’t appear to be one of their major priorities. Some of the specific skills the venues mentioned they would like to develop included digital marketing, publicity, digital content creation, customer database management and sales. Simphiwe from the Soweto Arts and Craft Fair would like to receive more marketing budget allocation when receiving artistic grants. Five of the venues had worked with external agencies introduced to them by Concerts SA to support their marketing and public relations and saw the potential for this approach in the future.

3.6.8 Artist Marketing

A common discourse among all venues was the frustration with artists not proactively marketing performances at their venues. Some of the venues felt this was due in part to a lack of skills, but mainly due to an unwillingness on the part of the artists. Some venues suggested the artists believed that marketing was the responsibility of the venue. Aymeric from the Orbit commented ‘we recently sent an email to all of the artists performing at the venue saying for the Orbit to stay alive they need to come to the party in terms of promoting their gigs. It has had an impact and we can see that artists are sharing and RT’ing our social media communications. However, you often hear some musicians complaining about the audience numbers, but what are they actually doing to create a profile online. In this day and age, if you aren’t doing this, then you are just going to sink as an artist’. Simphiwe added ‘some mainstream artists leave the marketing up to us when they should be helping as they have the following. If our audience doesn’t know them, then they must pitch themselves to them’. The venues included promotion expectations in artists’ contracts, however this didn’t guarantee cooperation from all artists.

Lindy from Jozi Unsigned suggested that younger, media-conscious artists understand their marketing responsibilities more as they have only operated in a world dominated by digital and social media. Mature musicians who were around pre-social media have a different take and while they are great promoting their shows if an opportunity presents itself, they are not proactively marketing their gigs.
Recommendations: Some Highlights

Audience Motivations

- Venues with socially-motivated audiences should ensure they have breakout spaces, seating and a bar for their audience to get the social interaction they are craving. Emotionally-motivated audiences prefer venues who ensure the performance is the focus of the experience. Marketing an event to this audience needs to facilitate an emotional connection between the performers and audience member through the initial promotion, at the event and post event.

- Venues could tap into young audiences’ desire for new experiences by implementing long-term audience development strategies which allocate a percentage of tickets (often those tickets which may not have been sold anyway) to potential audiences such as university students or artists for free as a way on introducing them to the venue or a new arts experience.

- Music genre is important to understand in South Africa as there are still racial preferences, making it more difficult to attract authentically diverse crowds. Music curators and festival organisers in South Africa could look at adding different genres or multi-genre artists to the same line-up to attract a more racially-diverse crowd.

Live Music Experience

- This research indicates a preference for dancing and sitting quietly at live music events, so the case study venues should provide both areas for sitting and dancing at events. While a bar is important to the audience, so is the connection with the artist, therefore a bar should be placed in the venue but not as a distraction to the main performance space.

- Young people prefer venues which offer diverse experiences as they wish to engage with the venue in different ways throughout the event. Venues which successfully attract young audiences such as Zone 6 and Kitchener’s have a number of spaces (bar, outdoor space and dancefloor) providing different experiences for young people at one event.

- Artists, promoters and venues should strive for uniqueness in their offering to younger audiences whether it takes the form of the space, the selection of artists on the line-up or the supporting social media strategy which offers unique ways of connecting with the artists and their fellow audience.

- Venues in South Africa should be conscious of people’s desire for authenticity in order to develop long-term relationships with their audiences. This research uncovered that for some of the young people authenticity was the degree to which they felt the venue wanted them in their space and they could determine this feeling if they sensed they were among like-minded people in the audience; they had the freedom to dress in a way that made them feel comfortable; and finally they were given options in how they could experience the event.

- Marketing to existing audiences costs much less, so venues should have audience development strategies which encourage loyalty and greater attendance frequency.

- With Concerts SA audience preferring to attend live music on the weekend, new audience development strategies could be trialled weekday evenings. For example, student or under 25’s events or live music formats which combine other popular art forms such film or spoken word/poetry.

- South Africans place monetary value on live music, however barriers reduce their capacity to pay for live music more often. It is advised for venues to monitor their average ticket spend prices and conduct their own audience research to determine the right ticketing strategy. Dynamic ticketing prices could help venues reach new audiences.
Recommendations: Some Highlights

Barriers

- Barriers to attendance can be broken down by emphasizing how venues are addressing these in their marketing. For example, it would be important to mention secure parking in marketing directed at women who cited concerns about safety, and messages about the frequency of events i.e. live music six evenings a week for men who cited a lack of programme consistency.

- With much of Concerts SA’s audience driving to events, free and secure parking located close to the venue is an extremely important consideration for venue owners and promoters, however it could be restricting alcohol beverage sales. Exploring potential partnerships with private taxi companies such as Uber could be a good long-term strategy for increasing the average beverage spend of audiences. Similarly, for attracting younger audiences more reliant on public transport, location and timing are considerations when planning live music events. Long-term collective industry pressure on government and commercial operators to improve access to affordable night public transport services will also be important to breaking down this barrier.

Audience Development

- Research should be prioritised at a micro-level by venues, artists and organisations, as well as being driven by industry and government. Venues could benefit from using local audience segmentation tools as well as industry-based research led by the South African media and advertising sector to find new audiences.

- Developing local audience development experts rather than relying on international experts with limited knowledge of the local context should be an important aspect of industry professional development programmes. Arts marketing, as a profession, could be promoted and offered at an under-graduate level in universities or private colleges in order to generate a pipeline of young professionals entering the sector.

- The sector could benefit from more collaborative working. For example, promoter Jozi Unsigned has been working with Concerts SA to manage artist booking and marketing for a number of their supported venues in Johannesburg and Gauteng. Smaller venues may benefit from sharing resources with fellow small arts organisations.

- All of the case study venues were interested in retaining and growing their audiences, so could benefit from professionalising their audience segmentation, marketing and research strategies – they should remain artistically-led but more audience-focused.

- Venues could identify target audiences based on a balance between artistic and financial objectives. For example, The Orbit had begun diversifying their core experience, that is, seated live jazz over dinner and drinks with experiences, like the Red Mug Sessions, targeting more socially-motivated audiences.

- Government or industry audience development programmes such as Orange Wednesdays in the UK or the cultural coupon scheme in Brazil could be implemented in South Africa to increase access to arts and culture. More of the existing corporate live music sponsorship could be channelled into programmes like this.

- Taking advantage of technology to better understand, and market to, audiences is an area all venues have just started to explore and require greater knowledge to implement. Key priority areas for skills development in the sector could include digital and social media marketing; digital capturing of audience data through online mailing lists and online surveys; digital reporting and analytics; customer databases and online ticketing.
4. Reflections on the Findings and Future Recommendations

The aim of this research was to study the motivations for, and barriers to, audiences attending and consuming live music in Johannesburg venues, as it was trying to identify how to segment South African arts and culture audiences based on motivation and consumption patterns, to understand if it could help inform future audience development strategies in South Africa. On the whole, the research has made a contribution to this aim as well being one of the first pieces of audience development literature within a South African and African context. It is just the first step and the research should be replicated with a focus on a broader geographical and demographic sample to get an accurate picture of the live music audience in South Africa.

4.1 Creating a Culture of Research

Arts and culture research in South Africa has been sporadic, commissioned as one-off studies making it difficult to compare trends over time. Therefore, the first recommendation of this report is for individual live music venues to take responsibility for formally understanding their own audience, rather than just relying on public funding bodies to conduct industry-wide research. While progress is being made at the industry level through initiatives like Concerts SA’s Songlines research programme and BASA Artstrack bi-annual audience report, research must be also prioritised at a micro-level by venues, artists and organisations. Regular market and audience research can help with wider organisational planning and expansion; opening up potential markets; implementing more targeted and cost-effective marketing strategies; benchmarking against other venues and industries; understanding wider societal trends; and securing public and private funding partners. There is a wealth of market and audience research conducted in South Africa by the media and advertising sector, namely the South African Audience Research Foundation (SAARF), which the live music sector could access to better understand their potential and existing audiences. One of SAARF’s audience profiling tools was used for this research, LSM, to help better understand the research audience. Using this tool in conjunction with venues’ own research could help inform marketing strategies, sponsorship proposals and future planning. In addition to SAARF, the media and advertising sector produce regular research on social media and consumer behaviour trends which could also inform marketing and audience development. Many of these reports are found on the industry website, Bizcommunity. In summary, while there has been limited audience and market research led by the South African arts and culture sector, there is expertise in the media and advertising sector which the arts and culture sector could use to better understand the local context. In order to create a culture of audience research, live music professionals could benefit from developing greater knowledge and skills in audience and market research.

4.2 Skills Development

Rentzschler’s evolutionary framework for the arts marketing profession was referenced in this study to understand where the case study venues were currently placed. This was important in framing the recommendations for the profession in South Africa. The live music marketing profession in South Africa appears to be polarised with the large-scale promoters having dedicated marketing professionals, detailed knowledge of their audiences and the resources to take advantage of digital technology to research and reach their audiences. On the other hand, you have smaller venues which don’t have dedicated marketing resources, and as a consequence, may place less priority or value in the profession. While lack of resources contributes to this, there was evidence that some of
the case study venues were more audience-focused choosing to embed that priority in their organisation with or without dedicated marketing resources. There are a number of initiatives led by industry organisations which prioritise skills development in arts marketing and audience development including the new BASA audience development programme supported by the British Council Connect ZA. This programme focuses on training arts organisations to interrogate current audiences, grow new audiences, and to become audience-focused organisations. Learnings from the programme will be shared with other organisations as a way of furthering the arts marketing profession in South Africa\textsuperscript{cxcvi}. Developing local experts rather than relying on international experts with limited knowledge of the local context is an important aspect of this programme. In addition to professional development programmes, arts marketing as a profession could be promoted and offered at an under-graduate level in universities or private colleges in order to generate a pipeline of young professionals entering the sector. Marketing and digital marketing is a popular profession in South Africa\textsuperscript{cxcvii} and the live music sector has the potential to take advantage of that talent to help professionalise the sector.

The research found that all of the venues interviewed felt artists relied on the venue to promote their performances. This was due to either unwillingness on the artists’ behalf or inadequate skills in marketing. Professional development schemes, such as those offered by BASA and the Arts and Culture Trust (ACT), could further prioritise marketing skills for artists to grow this capability in South Africa. Venues are also likely to benefit from a prioritisation of marketing expectations for artists through the inclusion of dedicated clauses in performance contracts.

In addition to further embedding audience development in the existing professional development opportunities for artists and arts professionals, the sector could also benefit from more collaborative working. For example, promoters Jozi Unsigned has been working with Concerts SA to manage artist booking and marketing for a number of their supported venues in Johannesburg and Gauteng. Smaller venues may benefit from sharing resources with fellow small arts organisations. For example, the medium-sized multi-arts venue the researcher worked for in London, UK had an arrangement with a similar arts organisation to share a finance director. Neither organisation had the resources to employ a full-time finance director, so the arrangement benefited both organisations. Shared services is not new concept and has been adopted by local governments in many countries, however this approach could be helpful for small live music venues who don’t have the resources alone to invest in marketing and audience development.

4.3 Artistically-led, Audience-focused

This research found that the case study venues had different levels of audience-focus, however Maitland argues the ideal approach is to be artistically-led and audience-focused. Venues who adopt this strategy place audiences at the heart of the organisation, without rejecting their artistic integrity\textsuperscript{cxcviii}. This approach is appropriate for the case study venues, who are informally thinking about their audiences but without formal strategies based on regular research. Furthermore, it could be argued that audience development can’t be considered in isolation by one person, it should be shared philosophy across the venue’s management and staff\textsuperscript{cc}. Artistically-led and audience-focused organisations seek to engage with audiences throughout their entire journey with the venue, from their first interaction on the website, to interaction with front-of-house staff in the venue, to post-event engagement such as formal audience surveys or via social media. Artistically-led but audience-focused organisations think about their audiences in a more complex way, segmenting them into target groups by their demographics, benefits and behaviour. Finally, they adapt the audience experience and marketing approach for each segment\textsuperscript{cc}. All of the case study venues were
interested in retaining and growing their audiences, and therefore could benefit from
professionalising their audience segmentation, marketing and research strategies.

4.4 Audience Development

As well as understanding the level of understanding and practice of audience development by
venues, this research sought to test a segmentation strategy which could inform future practice in
South Africa. South Africa’s recent history has left racial and spatial legacies which mean audiences
are still largely defined by demographic traits, namely ‘race’, age, sex and educational level. While
these traits are still important for identifying and targeting audiences, a more complex way of
segmenting audiences is needed where 80% of the population identifies themselves as one ‘race’
and almost a third of the population is aged between 15 and 34 yearsccii.

4.4.1 Motivation

As the research indicated, audiences have different motivations for attending live music, which has
implications for the way venues tailor their messages for each audience as well as the type of
experience they seek at the venue. Socially motivated audiences seek out ways to engage with their
fellow audience members either in the form of communal spaces where they can converse in
between music sets or through an opportunity to mix with people at the bar. The quality of the
experience is not only determined by the artistic performance, but by a number of factors such as
whether the audience were like-minded, the venue’s atmosphere and even the collective feedback
through the post-event social media. This contrasts with spiritually (self-actualisation) or emotionally
motivated audiences who have a deeper connection with the music and artist as well as the
authenticity of the experience from the artists’ performance to the audience and the venue ethos.
While the research indicated audiences all have some level of social motivation at live music events,
they are motivated differently, and as such, they should be segmented accordingly with tailored
marketing and experiences.

Venues could benefit from prioritising their target audiences based on a balance between artistic
and financial objectives. For example, The Orbit had begun diversifying their core experience, that is,
seated live jazz over dinner and drinks with experiences targeting more socially-motivated
audiencesccii. The Red Mug Sessions are a collaboration with Nescafe which targets audiences
through Facebook. The experience is more focused on the social aspect of live music rather than the
featured mainstream artists. They market the event using images of people interacting with each
other and encourage social media engagement during the eventcciv. This artistic offering is different
than their core experience, however it illustrates an audience development strategy based on
motivation-based segmentation. Another example from one of the case study venues using a
motivation-based segmentation strategy is the Soweto Arts and Craft Fair. They have identified
people who are emotionally connected to supporting local, up-and-coming musicians and creatives
as their core audience, however they understand that mainstream artists attract larger crowds who
are more socially motivated. Therefore, Simphiwe adopts a dual strategy of showcasing mainstream
artists alongside up-and-coming artists in order to respond to the motivations of both audiencesccv.
4.5 Authenticity and Hedonic Consumption

As well as understanding audience motivations, venues could seek to understand what type of experience their existing and potential audiences want to have when consuming live music. The research indicated that audiences like to have a connection with the artist performing. This could be achieved by creating opportunities for engagement prior to the event through unique content such as exclusive artist interviews on the venue’s social media channels or at the event itself with an artist question and answer or a meet and greet session pre or post performance.

Another key insight was young audiences’ preference for the freedom to experience live music in the way they desired. That is, they prefer venues which offer diverse experiences as they wish to engage with the venue in different ways throughout the event. This has implications for venue design. Venues which successfully attract young audiences such as Zone 6 in Soweto and Kitchener’s in Braamfontein have a number of spaces providing different experiences young people like to have at one event. These include a separate bar away from the live music space for socialising and relaxing; a dedicated performance space which allows for dancing; and an outdoor space. This flexibility allows young people the freedom to personalise the experience to their needs. Personalisation of experience is not only a global arts audience trend, but also a current consumer trend in South Africa. Young people’s preference for outdoor live music events was an interesting insight which could be tested with a larger, more geographically diverse sample. This could have implications for venues looking to develop young audiences and help inform the types of experiences they could offer. Venues could combine indoor and outdoor spaces for live music events similar to the Soweto Arts and Craft Fair and the Soweto Theatre collaboration. Alternatively, they could ensure the venue has some space with fresh air or skylights which promote a sense of openness despite being indoors.

While the physical attributes of a venue can help contribute towards the audience’s perceived quality of the event, the research indicated that consumption of live music was more focused on the multi-sensory and emotive aspects of their experience, their hedonic consumption. This deeper connection with the experience responds to the phenomenon explored in the background and findings chapters as well as reflecting broader consumer trends in South Africa. South Africa’s Media Online reported that in 2014 escape and mindfulness were two of the top six consumer trends in South Africa. Escapism suggests people are demanding more from every type of experience and seeking experiences that allow them to let go of all responsibilities. Mindfulness argues that in a world overloaded by marketing and communication, people are looking for more depth and meaning from their experiences. This supports the research findings and aligns closely with young people’s desire for authenticity. Afrikan Freedom Station capitalises on young people’s desire for mindfulness but combining a programme of live music, film, poetry and visual art that explores more than art, but broader notions of living as a young African today.

This research supports Osborne and Rentschler’s argument that authenticity is a vital ingredient in developing relationships with audiences. Venues in South Africa should be conscious of this desire for authenticity in order to develop long-term relationships with their audiences. Authenticity could mean something different to every person so gathering insight on this could help venues tailor the experience and communication approach to their different audiences. For example, this research uncovered that for some of the young people authenticity was the degree to which they felt the venue wanted them in their space and they could determine this feeling if they sensed they were
among like-minded people in the audience; they had the freedom to dress in a way that made them feel comfortable; and finally they were given options in how they could experience the event.

Having an authentically-diverse audience is also important to audiences when evaluating how authentic they perceive a venue to be. The venue’s actual audience needs to reflect their positioning, that is, if they say they attract all ‘races’ then they must prioritise this in their audience development strategies. Ensuring the venue markets its events through multiple communication channels and in a range of locations across Johannesburg could help attract authentically-diverse audiences. An important observation was that young people in Johannesburg didn’t perceive venues in other locations such as Pretoria or Cape Town as being open to them based on ‘race’. Changing these perceptions will take time and relies on both interventions at a social level among friends, but could also be addressed through large scale interventions such as promoters or local government hosting some live music events in locations like Pretoria over Mary Fitzgerald Square, Sandton or Soweto.

Another aspect of authenticity was linked to the young people’s search for uniqueness in the venue, experience and artists. This research sample of young people rejected mainstream venues, they perceived were located in the northern suburbs of Johannesburg, which attracted money-led and less creative audiences. Therefore, to be attractive to this audience, venues should articulate what is unique and authentic about their venue and the artists who perform there. Targeting audiences through influencers of young people such as bloggers or fellow up-and-coming creatives could be one strategy aimed at attracting young people searching for uniqueness.

4.6 Barriers

The removal of barriers to live music attendance is an extremely important consideration for audience development. This research highlighted a number of significant physical and social barriers which acutely affect people in South Africa.

Lack of disposable income, access to public transport and safety are three legacies of apartheid which have created barriers to people attending more live music. These barriers are not easily resolved, so live music venues should adopt long-term strategies which try to address these.

Timing of events is an important consideration for attracting audiences. Personal safety is a concern for people travelling in mini taxis at night in Johannesburg. Early evening and afternoon weekend performances is one strategy venues and promoters, such as the Soweto Arts and Craft Fair, are adopting to increase access. Evening live music events are more successful attracting people in locations in close proximity to residential neighbourhoods such as Braamfontein, Melville and Soweto where they can walk home or pay low fees for private cabs. New private taxi firm, Uber, which is offering low cost fares and a perceived secure service could have a positive impact on attendance at live music events at night. Finally, the proposed Rea Vaya night bus initiative could help increase access for people to live music events. Collective action by the live music industry is needed to fast-track access to affordable, night public or commercial transport services.

To help grow a future audience for live music in South Africa, venues would benefit from removing institutional barriers such as pricing which reduces access for young people. Venues are encouraged to implement long-term audience development strategies that introduce young people to their venues. These could include student or under 25’s pricing strategies; dynamic ticketing models which offer different experiences for different prices; dedicated youth-focused events on non-peak evenings such as mid-week; and membership schemes. Schemes with universities, or partners with
youth audiences, that provides access to un-sold tickets has been adopted globally as well as by the Market Theatre in South Africa. This creates opportunities for young people to experience live music, while the venue is not losing potential ticket sales. This research found that young people are willing to attend live music more frequently at a lower price point than mature audiences. Live music venues could follow the lead of fashion and smartphone brands in South Africa who recognise the potential in the large youth market and adapt their price and service offerings to secure long-term loyalty with them. Some of the audience development strategies mentioned are responding to this consumer insight.

Government or industry audience development programmes such as Orange Wednesdays in the UK and the cultural coupon scheme in Brazil could be implemented in South Africa to increase access to arts and culture. The UK business sector has a history of collaborating with arts organisations to support audience development schemes. For example, Orange Wednesdays was a long term partnership between a mobile provider and cinemas across the UK offering two tickets for the price of one every Wednesday. The scheme was hugely successful in introducing new audiences to independent cinemas as well as cultivating a culture of regular cinema attendance. A new cultural coupon scheme has been set up by the Brazilian government, partially funded by the private sector, to increase access to culture for people living in poverty. Benefactors of the scheme are given a monthly allowance of $20 US, which is loaded on a magnetic card, to be designated for purposes broadly termed cultural.

In 2013 approximately R231 million was invested in music by corporate sponsors, over half of the total corporate sponsorship spent on arts and culture in South Africa. If some of that investment could be channelled into long-term, large-scale audience development programmes such as the cultural coupons scheme in Brazil or a version of Orange Wednesdays like the Nescafe Red Mug Sessions, it could help to grow a larger audience base to support the live music, arts and culture sectors. From observation, much of the corporate investment in the arts in South Africa is focused on developing artists with limited focus on increasing access to audiences. This shift in focus is required across the sector to ensure there is a greater balance between audience and artistic development. A good example of this balanced approach, is the new Concerts SA initiative, which aims to grow audiences for small to medium-sized live music venues as well as creating a consistent paid live music circuit for artists to perform. Concerts SA support a network of venues across the country by providing contributions to artist fees and marketing budgets. The initiative also aims to overcome barriers by giving greater access to people in rural areas through partnerships with schools and community organisations.

Racial legacies of apartheid have created more complex perception barriers to live music. Venues with a heritage connected to specific ‘races’ may have a greater chance of long-term sustainability by introducing audience development strategies, artistic programming and language which reaches out authentically to new audiences. This research indicated young people in Johannesburg prefer live music events or venues that aren’t ‘race-dominated’ but rather attracts a diverse audience. However, they also suggested that this was specific to Johannesburg and may not be the case in other locations around South Africa such as Cape Town and Pretoria. This aspect of the study should be replicated in other locations within Johannesburg and South Africa to discover the true picture of barriers related with the racial legacies of apartheid.
4.7 Digital

Taking advantage of the opportunities presented through digital media was an important finding of this research from its potential as a communication channel with audiences, to how venues could take advantage of it to capture information and understand audiences.

Digital marketing is an extremely important tool for reaching young audiences, with 100% of the young people interviewed highlighting social media and websites as where they go to hear about live music events. Furthermore, young people spend a large percentage of their time online using social media with six out of seven of the young interviewees accessing social media between five and seven days per week. The quantitative research also highlighted how important social media is to marketing to all audiences regardless of ‘race’, gender or age. Over 80% of online respondents use social media to find out about live music, followed by word-of-mouth (43%) and mentions in the media (41%).

![Chart 10 Online Respondents’ Live Music Marketing](chart)

<table>
<thead>
<tr>
<th>Where do you go most often to find out about live music events?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media</td>
<td>50.00</td>
<td>85.83</td>
<td>93.75</td>
<td>75.00</td>
</tr>
<tr>
<td>Venue website</td>
<td>0.00</td>
<td>29.17</td>
<td>25.00</td>
<td>17.31</td>
</tr>
<tr>
<td>Venue newsletter</td>
<td>0.00</td>
<td>13.33</td>
<td>18.75</td>
<td>9.62</td>
</tr>
<tr>
<td>Posters and flyers</td>
<td>16.67</td>
<td>29.17</td>
<td>37.50</td>
<td>17.31</td>
</tr>
<tr>
<td>Media</td>
<td>50.00</td>
<td>43.33</td>
<td>25.00</td>
<td>46.15</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>33.33</td>
<td>45.00</td>
<td>68.75</td>
<td>36.54</td>
</tr>
</tbody>
</table>
Marketing to people through digital channels is not the only consideration for venues in today’s climate as increasingly audiences interact with each other online as part of their experience at live music events. This concept is known as collective engagement, that is, the audience’s collective sense of engagement with the performers and the other audience members during the event and/or via discussions before or after the performance. Social media now plays a central role in audiences’ experience at a live music event whether it is via Instagramming or tweeting a picture of the performance during the event; or by connecting to their fellow audience members via a common hashtag or location tags. An example of this new trend is illustrated by the type of experience Nomsa liked to have at live music events. ‘I hope to leave the place feeling happy. Being excited to get home and tweet about it or write a Facebook status about the event. If I don’t tweet or write a Facebook status about the event, then I didn’t really have that much fun’.

Taking advantage of technology to better understand, and market to, audiences was an area all venues had just started to explore and required greater knowledge to implement. Key priority areas for skills development in the sector include digital and social media marketing; digital capturing of audience data through online mailing lists and online surveys; digital reporting and analytics; customer databases and online ticketing. These skills could be incorporated in professional development opportunities offered by industry organisations as well as within venues. The South African media and advertising sector has these expertise and there are a number private training institutions which offer training in these areas including Quirk, Vega and City Varsity. One of the venues, the Soweto Theatre, had just entered a partnership with Vega to implement a professional development programme with their core staff. Arts industry conferences and workshops could also take advantage of this local knowledge by featuring speakers and trainers from this sector alongside international experts from the arts and culture sector.

### Table 19 Online Respondents’ Preferred Marketing Age Comparison

<table>
<thead>
<tr>
<th>Where do you go most often to find out about live music events?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social media</td>
<td>78.57</td>
<td>84.09</td>
<td>98.15</td>
<td>80.77</td>
<td>72.22</td>
<td>23.08</td>
</tr>
<tr>
<td>Venue website</td>
<td>0.00</td>
<td>23.86</td>
<td>25.93</td>
<td>23.08</td>
<td>46.15</td>
<td>38.46</td>
</tr>
<tr>
<td>Venue newsletter</td>
<td>7.14</td>
<td>10.23</td>
<td>14.81</td>
<td>15.38</td>
<td>22.22</td>
<td>7.69</td>
</tr>
<tr>
<td>Posters and flyers</td>
<td>14.24</td>
<td>10.23</td>
<td>29.63</td>
<td>11.54</td>
<td>22.22</td>
<td>7.69</td>
</tr>
<tr>
<td>Media</td>
<td>50.00</td>
<td>40.91</td>
<td>35.19</td>
<td>46.15</td>
<td>44.44</td>
<td>46.15</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>28.57</td>
<td>62.05</td>
<td>53.70</td>
<td>46.15</td>
<td>44.44</td>
<td>15.38</td>
</tr>
</tbody>
</table>

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5. Conclusion

In conclusion, this exploratory research is one of the first pieces of detailed audience research in the live music, and the wider arts and culture sector, in South Africa. It will hopefully encourage further research and scholarship from a South African and Global South perspective. There are considerable insights which could be explored in future research undertaken with a larger and more geographically diverse audience sample as well as understanding audience development practice by different players in the industry such as large promoters and artists. Most importantly, this research aims to assert the importance of understanding and developing audiences for the future of the live music sector in South Africa.

6. Bibliography

Primary Sources

QUALITATIVE

In-depth Interviews

Young people

- Modisaotsile was interviewed at the Afrikan Freedom Station in Westdene, Johannesburg on 5 November 2014.
- Nomsa was interviewed at the Bannister Hotel in Braamfontein, Johannesburg on 10 November 2014.
- Lesedi was interviewed at Wits Café in Braamfontein, Johannesburg on 13 November 2014.
- Lethabo was interviewed at Live SA offices in Braamfontein on 14 November 2014.
- Ntombenhle was interviewed at Velo Café in Braamfontein on 16 November 2014.
- Nzolo was interviewed at Live SA offices in Braamfontein on 18 November 2014.
- Polly was interviewed at Live SA offices in Braamfontein on 19 November 2014.

Venues and Promoters

- Aymeric Péguillan, owner of The Orbit, was interviewed at The Orbit in Braamfontein on 16 October 2014.
- Carl Johnson, General Manager of the Soweto Theatre, was interviewed at the Soweto Theatre in Soweto on 29 October 2014.
- Robert Motseko, Marketing Manager of the Soweto Theatre, was interviewed at the Soweto Theatre in Soweto on 29 October 2014.
- Simphiwe Twala, Project Manager for the Soweto Arts and Craft Fair was interviewed at the Soweto Theatre in Soweto on 29 October 2014.
- Steve Kwena Mokwena, owner of the Afrikan Freedom Station was interviewed at the Afrikan Freedom Station in Westdene, Johannesburg on 21 October 2014.
• Niki Rwaxa, owner of Niki’s Oasis, was interviewed at Niki’s Oasis in Newtown, Johannesburg on 21 October 2014
• Conway Falconer, owner of Lucky Bean, was interviewed at Lucky Bean in Melville on 11 February 2015.
• Sello Mokau, owner of Iketleng, was interviewed at Iketleng in Vereeniging on 14 February 2015.
• Lindy Mtongana, Project Coordinator, Jozi Unsigned, was interviewed via email on 3 June 2015

Observation

• The Orbit in Braamfontein, Johannesburg on the evening of the 5 November 2014.
• Soweto Arts and Craft Fair at the Soweto Theatre in Soweto on the afternoon of the 8 November 2014.
• Afrikan Freedom Station in Westdene, Johannesburg on the evening of the 24 January 2015.
• Taboo in Sandton, Johannesburg on the evening of the 11 February 2015.
• Niki’s Oasis in Newtown, Johannesburg on the evening of the 21 February 2015.
• Iketleng in Vereeniging on the evening of 14 February 2015.
• Da Venue in KwaThema on the evening of 27 March 2015.
• Lahliwe’s in Khutsong on the afternoon of 5 April 2015.

Quantitative

• Online survey of Concerts SA audiences - 300 sample
• In-person surveys of Concerts SA audiences at Iketleng, Da Venue and Lahliwe’s – 35 sample

Secondary Sources


Calman, L, 2011, ‘From a research idea to a research question’, School of Nursing, Midwifery and Social Work, presentation, University of Manchester, Manchester.


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O’Connor, E, 2015, Johannesburg Live Music Audiences: Motivations for, and barriers to, 18-to-25 year-old audiences attending and consuming live music in Johannesburg venues, masters research report, University of the Witwatersrand, Johannesburg.


7. Appendix

7.1 Case Study Venues

This section provides a profile of each of the case study venues based on background information gathered by attending a live music panel discussion at the 2014 Moshito Music Conference and Exhibition; through in-depth interviews with venue owners, staff and promoters; in-depth interviews with audience members; online research and observation at the venues.

The Orbit
Braamfontein, http://www.theorbit.co.za/

The Orbit was launched in 2014 by Aymeric Péguillan who ran a small jazz social club in Troyeville, Johannesburg in the 2000s. His business partners include Dan Sermand who is an executive producer for Swedish musicians such as Nils Landgren. It is a live music venue with bistro and is based in Braamfontein in close proximity to universities and student accommodation. The owner suggested that live music is the primary objective of the space, however the venue’s business model relies heavily on food and beverage sales. Aymeric commented that the location was chosen as he wanted the venue to be in downtown Johannesburg as opposed to suburban locations. Braamfontein was chosen as a redeveloped and relatively safe area which doesn’t attract the same noise complaints that venues in residential locations suffer from. Known for its nightlife, Braamfontein has the vibrancy and buzz he was searching for to launch a new venue.

Aymeric is adamant that the venue exclusively features jazz with some improvised and soul music performances from time to time. He believes with jazz such a popular music genre in South Africa, people were crying out for a dedicated jazz venue similar to the venues that emerged in the immediate years post-apartheid.

While he is committed to his ambition of staging live jazz music six-nights-a-week, he acknowledged that it is financially challenging due to a need to grow a bigger live music audience base. The venue is known for its quality sound equipment, experienced sound professionals and is one of the only live music venues in South Africa with a grand piano included in the backline offering to performing artists.

The venue aims to lead the way in offering the best possible creative expression platform for jazz musicians in Johannesburg. It offers regular live music programming (up to six nights a week) and is equipped with backline, PA equipment and sound engineering services. Aymeric is adamant that the venue exclusively features jazz with some improvised and soul music performances from time to time. He believes with jazz such a popular music genre in South Africa, people were crying out for a dedicated jazz venue similar to the venues that emerged in the immediate years post-apartheid.

The Orbit is a sophisticated venue with the audience predominately seated at tables who enjoy dinner and drinks during performances. The main performance space is upstairs with the restaurant downstairs. You will be seated upstairs for dinner if you purchase a ticket for the show that evening. Ticket prices to see live music range from R50 to R200. There are a few stand up tables for people to stand and listen to the music, however this doesn’t feel encouraged. There are a handful of standing music events, with the majority of live music staged with a seated audience. The live music capacity for a seated event would be approximately 200 people with a standing event catering for over 500 people. The dinner offering could be considered expensive compared to many restaurants with a similar menu. However, Aymeric suggested that having dinner and a show at The Orbit is an
once-in-a-lifetime experience which could account for the slightly more expensive drinks and dinner price\textsuperscript{ccxxvi}.

Based on Aymeric’s informal knowledge, the primary audience at The Orbit are middle class professionals aged between 35 and 50 years\textsuperscript{ccxxvii}. Based on the observation, the venue appeared to attract a diverse audience of ‘races’ which reflects the racial makeup of Johannesburg\textsuperscript{ccxxviii}.

The venue is open six days a week with the downstairs restaurant offering with free Wi-Fi\textsuperscript{ccxxix}. The Orbit is a recipient of artist funding as part of the Concerts SA live music initiative.

\textit{Afrikan Freedom Station}

\textbf{Westdene, \url{www.facebook.com/AfrikanFreedomStation}}

Since opening in 2012, the intimate Afrikan Freedom Station space hosts regular live music as well as exhibitions, film and poetry nights. It was founded by painter and filmmaker Steve Kwena Mokwena and is located in Westdene, near Sophiatown, a legendary Black cultural hub that was destroyed under apartheid\textsuperscript{ccxxxi}. On their Facebook page, the Afrikan Freedom Station describes itself as ‘an Afrocentric, multimedia gallery. Audiences can enjoy the art and audio visual experience whilst enjoying a cup of organic African coffee and homemade delights\textsuperscript{ccxxi}.

The space for live music is extremely intimate, catering for up to thirty people. It is a space to ‘chill’ which encourages creativity and critical discussion. Founder Kwena argues the space is for creatives first and foremost, however all people with an Afrocentric interest would be welcome at the venue. Physically the space feels like a well-loved home which you have been invited into. It offers simple, but food and drinks at a very affordable price to cater for its audience of mainly young people\textsuperscript{ccxxxii}. The venue has a voluntary ticket arrangement with its audience, that is, a bucket is passed around by the venue staff who suggest you pay R80 for the live performance\textsuperscript{ccxxxiii}. Kwena described the venue in an article by Percy Mabandu, ‘\textit{we are not part of a gated cultural precinct; we are a street-level intervention for young Africans}\textsuperscript{ccxxxiv}.

Kwena added that while the venue is frequented predominately by young Black people, the space is open to all\textsuperscript{ccxxv}. This statement seemed appropriate for during observation the researcher, with her limited connection to the space or his personal narrative, felt instantly welcomed by the people in the venue\textsuperscript{ccxxvii}.

The location of the venue is very significant to the owner. In Kwena’s eyes it perches uncomfortably in Westdene on the edge of Sophiatown which is his preferred location. Sophiatown is deeply connected to the founder’s family history and there are plans to relocate to a new, larger site in Sophiatown in 2015. The new venue will increase its capacity from serving 20 meals a day to 100 meals a day in their café\textsuperscript{ccxxxvii}.

The venue offers free Wi-Fi to audiences, which Kwena suggested is a huge draw card for young people who frequent the venue during the day to work, create and collaborate with fellow artists\textsuperscript{ccxxvii}. In terms of its live music offering, the venue presents mainly jazz as well as curated DJ sets and improvised music. Some South African acts to have performed at the venue include Herbie Tsoaeli, Katlego Gabashane, Nduduzo Makhatini, Estelle Kotok, Malcom Jiyane, Siya (from The Brother Moves On) and Uju\textsuperscript{ccxxxviii}.

The venue generates income through their café as well as ticket sales at their live events, however Kwena indicated this would not cover much of the operating costs. His additional income generated
through personal artwork sales also contributes to covering the venue’s expenses. His aim is to make the venue sustainable and when we talked, he was in the process of developing a business plan which explored new revenue streams. Afrikan Freedom Station is also a recipient of artist funding as part of the Concerts SA live music initiative.

**Soweto Theatre**


The architecturally-inspiring Soweto Theatre opened in 2013 as an international standard theatre space. It is a Municipal Owned Entity (MOE) of the City of Johannesburg and is part of the wider organisation, Joburg City Theatres. In its first year the theatre did not appoint a full-time leadership team so was known more as a receiving house for privately-booked events than for curating its own artistic programme.

In 2014 Carl Johnson was appointed the full-time general manager and is responsible for leading the organisation. Carl suggested that the venue is still largely a receiving house, generating most of its income through private hires such as the production of television show *South Africa’s Got Talent* or the *DRUMbeat Music Festival* run by music promoters *Hilltop Live*.

Key artistic programming, marketing and youth engagement positions were appointed in 2014 and a small, curated artistic theatre programme has commenced with a number of local theatre productions commissioned and performed at the venue.

The venue has state-of-the-art equipment and facilities including three theatre spaces, catering for over 400 people in the main theatre, plus 180 and 90 people in the smaller theatres. It hosts office space plus a café which opens throughout the day. As a new space, it has not attracted a regular audience and is yet to establish itself as a destination for dining or working in Soweto. Currently, there is no free Wi-Fi, but there are plans to offer it to audiences in the near future as a strategy to attract people to work and dine at the venue outside of performance times.

Soweto is an urban area of Johannesburg, which was first created in the 1930’s when government began separating the Black from the White population of South Africa. The Soweto Theatre is located in the Jabulani Precinct in Soweto next to a recently developed shopping complex, Jabulani Mall. Carl indicated that Jabulani is a new designated entertainment precinct with further development planned in the next decade including an outdoor performance amphitheatre, offices and rehearsal spaces for arts and cultural organisations, residential space and a business park. Carl added that the City of Johannesburg would like to create a community in the precinct where people can live, work and play.

The Soweto Theatre has a mixed live music offering, acting as a receiving house for most of their live music productions from external music promoters. Both the theatre’s marketing manager and general manager indicated that the theatre was intended for all audiences and don’t see the space as being for Sowetans only. However, they both expressed a desire to tell local stories through their theatre programming. They both suggested that their primary audience was still to be refined, which may be due to the fact that the venue hosts so many different live music events, from urban hip hop, soul and traditional African genres to choral music. With this in mind, this study will focus on the Soweto Arts and Craft Fair which is hosted at the Soweto Theatre each month.

As indicated earlier, the theatre is a MOE and as such, receives core costs from the City of Johannesburg. It has annual revenue generation targets which it must achieve and they aim to do...
this predominantly through private hires. The Soweto Theatre is part of the Concerts SA live music initiative, however they channel the grant through the Soweto Arts and Craft Fair\textsuperscript{ccxlviii}.

\textit{Soweto Arts and Craft Fair}

The fair is run in partnership with the Soweto Theatre and offers live contemporary music alongside a fair showcasing locally-produced arts and craft. It has been staged just outside the Soweto Theatre in their undercover front entrance since 2013.

The fair’s ambitions are to encourage support for local music, arts and craft as well as to create a unique event in Soweto as opposed to Johannesburg. One of the fair’s founders, Simphiwe Twala, also expressed a desire to expose young people to the arts by hosting children’s activities and performances during the earlier part of the fair. ‘\textit{We like kids to mix with our audience because we like to develop our audience and the earlier you introduce them to the arts they grow with that culture. They grow a love and appreciation for arts}’\textsuperscript{cclix}.

The audience could be described as young and creative with a large percentage of the audience being Sowetans who attend in groups of friends and family. There is a relaxed atmosphere and a warm and supportive crowd, however during observation the researcher felt somewhat out of place. The main reason for this was due to how the space was configured with the market stalls becoming seats for the audience to watch the performances on stage making it difficult to walk freely around the market stalls without interrupting the audience sight line\textsuperscript{ccl}.

It is free to attend the fair, however market stalls are charged a fee to host their stall. The fair receives financial support from Concerts SA for artist appearance fees and marketing, in-kind support from the Soweto Theatre and has a partnership with Jozi Unsigned to support with their marketing and public relations. Jozi Unsigned is a new organisation which offers artist management, music promotion and talent booking services to the music industry. As stated on their website, Jozi Unsigned believe in ‘\textit{local talent, the power of the arts and also in the dynamic, cosmopolitan group of pro-active young people in Johannesburg}’\textsuperscript{ccx}. Despite attracting large audiences (some events attracted over 1000 people), the fair is financially challenging to sustain\textsuperscript{ccxi}.

In terms of the live music offering, the fair features up and coming contemporary South African artists of different genres including soul, jazz and hip hop. In the past, they have featured mainstream artists such as The Soil which has attracted the largest crowds, however Simphiwe indicated this was not always financially sustainable. His ideal line up would include a balance of high profile and up-and-coming artists\textsuperscript{ccxii}.

\textit{Niki’s Oasis}

Newtown, \url{https://www.facebook.com/pages/Nikis-Oasis-Jazz-Restaurant/1540522446211477}

Based in the heart of Newtown, Niki’s Oasis is a Johannesburg jazz venue and restaurant with a long history. In its 20 years of operation, Niki’s has survived the trend of live music venue closures in the 2000’s, and as such, continues to be regarded as part of the cultural fabric of Newtown and post-apartheid Johannesburg\textsuperscript{cclv}.

The venue is run by its two owners, Niki Rwaxa and her husband. It aims to promote the development of young up-and-coming South African jazz artists as well as being a place for people to come and relax at the bar and traditional South African restaurant\textsuperscript{cclv}. 
The venue has gone through a challenging time in recent times with the redevelopment of Newtown and the construction of a new mall in close proximity. Niki estimated that her audience numbers reduced by 60% during construction. With the end of construction nearing, Niki had plans to revamp the venue with a new stage and cosmetic improvements in December 2014. During observation in February 2015, some improvements to stage and performance area were noted.

Niki’s Oasis is located in downtown Johannesburg in Newtown, which was the home of some of the most influential live music venues in the 1990’s and is now a designated cultural precinct by the City of Johannesburg. The precinct has had many challenges in attracting a consistent audience due to safety concerns as well as inconsistent cultural programming. Niki’s Oasis stands opposite the historic Market Theatre and benefits from pre and post theatre show crowds. With the area attracting new development, such as Nedbank relocating their offices into the new mall, Niki’s Oasis could potentially be located in a prime spot for increased future audiences.

During observation the researcher felt a connection with the history of the venue through the distinctly South African art on the walls and the existence of what seemed like the original 1990’s décor of venue. The researcher found herself imagining who might have performed there in the past. The venue attracts a group of regulars who make up around 70% of the venue’s core audience and it continues to be meeting place for Black males over 50-years-old who come to socialise and listen to jazz. This type of audience was noted during observation, however there were also one or two groups of couples in their 30’s. While maintaining their loyal audience is important, the survival of Niki’s may require the venue to reach out to new audiences.

The venue features a stage, bar and seated tables where people eat. Niki suggested that her audience eats more than they drink and there are many groups who only come to eat at restaurant after work during weeknights. Tickets to see live performances cost on average R80, and like Afrikan Freedom Station, the staff come around to their audience personally to collect the door fee.

There is regular live jazz presented at the venue on Fridays and Saturdays, however very limited information is available online about upcoming events and they rely on a more traditional communication style of emailing and SMS’ing existing audiences. Finally, the venue’s core revenue comes through their food and beverage rather than ticket sales. They are a recipient of artist funding as part of the Concerts SA live music initiative.

Iketleng

Iketleng is a small live music venue with bar and restaurant located in Steelpark, Vereeniging in Gauteng. Run by owner Sello Mokau, the venue began live music events around the time of the World Cup in 2010.

Sello suggests that the venue caters for mature audiences from 26-years-old upwards. The audience is very knowledgeable and experienced with live music as they often like to sits and discuss music as well as to dance.

They host monthly live jazz events and the audience tends to attend from 7pm to 11.30pm in the evenings. He has ambitions for live music to be the core offering of the business which is currently a bar and Chisanyama restaurant.
Sello has only ever done informal audience research, however feels his audience are not from Steelpark (only 2%) but from further afield. He believes they are attracted to the venue’s integrity for showcasing quality jazz music and he has a network of people who spread the word. Lindy from Jozi Unsigned who promote events at Iteleng echos Sello’s description: ‘Iketleng is located in a lower-middle class, semi-industrial area called Steelpark, on the outskirts of Vereeniging. It caters to an older, wealthier audience who arrive in a BMW and order a bottle of Johnny Walker Whiskey for the table. Their clientele comes from a wider radius and feels more open to non-locals than other venues’.

Sello markets the live music around the venue, promoting upcoming programme on posters as well as through Facebook and Twitter accounts. He works with the station managers of the local radio station.

Observation indicated that 90% of the audience could be identified as Black and from 25 years upwards. The audience appeared to drive to the events, were dressed sophisticated casual and spent substantial money on alcoholic drinks including more expensive spirits. They are a recipient of artist funding as part of the Concerts SA live music initiative.

**Lucky Bean**

Melville, [http://www.luckybeanrestaurant.co.za/](http://www.luckybeanrestaurant.co.za/)

Lucky Bean is a small restaurant (with accommodation) located in a central suburb of Johannesburg, called Melville. Owner Conway Falconer suggests that music is not a major part of the business, however they host about ten live music events at the restaurant a year.

Conway started booking live music at Lucky Bean in 2004 and has always booked the music he likes and he felt there was a shortage of venues presenting that type of music. Their live music programme showcases original, established and high quality artists (not up-and-coming artists) so they can attract the ticket/food and beverage sales to pay the artists. They also host regular DJs three times a week, however Conway doesn’t consider them as part of the curated live music programme.

The space is small and intimate, with a relaxed and open atmosphere. The live music experience is intimate, personal and close-up with artist and audience. Their audience is mainly motivated to attend Lucky Bean for the dining experience, however on live music nights Conrad feel the audience is motivated by the music not the social dining experience.

The venue is open to all who are able to afford the dinner and drinks prices, however Conway feels the venue is affordable. Lucky Bean doesn’t attract students even though they are located in the student-heavy area, he feels the audiences is more mid-20s upwards. He articulated different audience types such as Africaans families, African intellectual and tourists, however felt the live music crowds were mainly White, depending on the artist. He feels people who come to Lucky Bean have similar values and appreciate the diversity in the crowd. Lucky Bean does encourage pre-booking and take deposits from customers prior to busy live music events. They are a recipient of artist funding as part of the Concerts SA live music initiative.
**Da Venue**
KwaThema, [https://www.facebook.com/thevenue.kwathema](https://www.facebook.com/thevenue.kwathema)

Da Venue is a bar in KwaThema located in the East Rand, Gauteng. Lindy from Jozi Unsigned who hosts events at the venue describes it as: *‘a very local spot, catering to local audiences in and around KwaThema in the East Rand. It’s distinctively youthful and caters for an audience who enjoys socialising, drinking and house music. I wouldn’t call it exclusive, but I think the audience is less experimental. The audience knows what they like, who they like and what they are willing to pay for.’*

The observation which took place on a Friday night highlighted a young audience of 18-to-40-year-olds (90% could be identified as Black) looking to have a good time after work. Conversations with some of the crowd members suggested that on a Saturday night audiences were more open to live music events. Small groups of people were grouped on seats taking advantage of the opportunity to socialise at the end of the week. The bar was well stocked in a diverse range of priced drinks, however the venue doesn’t seem open to audiences who prefer not to drink alcohol. They are a recipient of artist funding as part of the Concerts SA live music initiative.

**Lahliwe’s**
Khutsong

Lahliwe’s is a small pub located in Khutsong township in Gauteng. The venue offers food and drinks and hosts regular DJs and live music. The audience was very local, mainly catering for the Khutsong community. Ninety percent of the audience could be identified as Black and there was a mix of gender and ages present.

The venue is not sophisticated, but rather a casual place for the community to meet and socialise over drinks. During the free live music event, which took place on a Sunday afternoon, the audience was very engaged and appreciative of the artists performing. One audience member commented to the researcher that they appreciated having quality musicians perform at their venue which they would like to see more often. They are a recipient of artist funding as part of the Concerts SA live music initiative.

7.2 Respondent profiles

**QUALITATIVE**

The following respondents were interviewed with a semi-structured approach in addition to a structured demographic profiling questionnaire including the **SAARF LSM** mapping. They were sourced either through a venue referral or via the researcher’s network of 18-to-25-year-olds connected with youth agency, Livity Africa. The respondents:

- are all South Africans who identify themselves as Black
- were all born, and currently reside, in Gauteng
- all have smartphones except for two people who have feature phones (i.e. Nokia or Blackberry).

NB: one of the respondents was 26 years old, which was still included in the survey as his age was very close to the target audience of 18-to-25-year-olds.

Lesedi

Age and sex: 23-24 years old, male  
Lives: Houghton  
Languages spoken: First (English) Other (Setswana)  
Education and employment: Highest level of education was Matric and is now employed full time  
Top 4 personal expenses: Alcohol, cinema, eating out and books

Spare time: Drink, sport and surf the internet  
Preferred media: TV (None) Radio (5FM) Magazines (Rolling Stone and New Yorker)  
Internet use: Access through cell phone everyday  
Social media: Facebook, WhatsApp and Snapchat  
Preferred websites: Live Mag SA, Africa is a Country  
Hear about live music events via: Blogs, Facebook, Twitter and word of mouth

LSM Profile: LSM 8 Low
LSM 8 is the bottom of the top LSM grouping (8-10) which accounted for 23% of the South African population in 2012. These people tend to be male, educated to Matric and higher, earn around $1299 US per month, have bank accounts and good access to the Internet plus increased disposable income for participation in activities. Over two thirds of these people will still catch mini taxis as their main mode of transport.  
Venues attended: Niki’s Oasis and The Orbit

Nzolo

Age and sex: 25-26 years old, male  
Lives: Soweto  
Languages spoken: First (isiXhosa) Other (English, Xitsonga, Sesotho, Setswana and isiZulu)  
Education and employment: Highest level of education was Matric and has been unemployed for between 0-6 months  
Top 4 personal expenses: Alcohol, airtime, eating out and DJs/live music

Spare time: Drink, eating out, DJs/live music and arts events  
Preferred media: TV (Vuzu) Radio (Metro FM) Magazines (Hype)  
Internet use: Access through cell phone mainly Mondays and Fridays 8am to 9am  
Social media: Facebook, WhatsApp, YouTube and Instagram  
Preferred websites: Tumblr  
Hear about live music events via: Social media and word of mouth

LSM Profile: LSM 8 High

87
LSM 8 is the bottom of the top LSM grouping (8-10) which accounted for 23% of the South African population in 2012. These people tend to be male, educated to Matric and higher, earn around $1300 US per month, have bank accounts and good access to the Internet plus increased disposable income for participation in activities. Over two thirds of these people will still catch mini taxis as their main mode of transport.

Venues attended: Soweto Theatre and Soweto Arts and Craft Fair

Ntombenhle
Age and sex: 23-24 years old, female
Lives: Newtown
Languages spoken: First (isiZulu) Other (English)
Education and employment: Highest level of education was a university degree and is currently employed full-time
Top 4 personal expenses: Alcohol, airtime, books, magazines
Spare time: Cinema, DJs/live music, eating out and reading
Preferred media: TV (None) Radio (Kaya FM) Magazines (Marie Claire, Elle and Vanity Fair)
Internet use: Access through cell phone everyday
Social media: Facebook, WhatsApp, Instagram and Twitter
Preferred websites: The Tiny Closet, Elle SA and the New York Times
Hear about live music events via: Facebook

LSM Profile: LSM 8 High

Modisaotsile
Age and sex: 25-26 years old, male
Lives: Yeoville
Languages spoken: First (Setswana) Other (English, siSwati, Sesotho sa Leboa, isiXhosa, Sesotho, and isiZulu)
Education and employment: Highest level of education was Matric and is currently employed part time
Top 4 personal expenses: Alcohol, airtime, computers and cameras
Spare time: DJs/live music, sport and visiting friends
Preferred media: TV (None) Radio (Kaya FM) Magazines (None)
Internet use: Access through pc or laptop at any time
Social media: Facebook and WhatsApp
Preferred websites: Times Live
Hear about live music events via: Facebook

LSM Profile: LSM 5
LSM 5 people represent the middle class of South Africa which are growing in numbers to nearly 40% of the population, a 7% increase from 2007 to 2012 (Mindshare South Africa, 2013). These people tend to be male, some are educated to Matric and earn around $350 US per month. Nearly two thirds of these people catch mini taxis as their main mode of transport.

**Venues attended:** Afrikan Freedom Station

**Lethabo**

**Age and sex:** 21-22 years old, female

**Lives:** Kensington

**Languages spoken:** First (English) Other (Setswana, isiZulu and German)

**Education and employment:** Highest level of education was a university degree and has been unemployed for between 0-6 months

**Top 4 personal expenses:** Alcohol, airtime, books, clothes

**Spare time:** DJs/live music, eating out, arts events and family related activities

**Preferred media:** TV (Vuzu) Radio (Uhkozi FM) Magazines (GQ, Elle and Rolling Stone)

**Internet use:** Access through pc or laptop everyday

**Social media:** Facebook, WhatsApp, Instagram and Twitter

**Preferred websites:** GQ, Rolling Stone, Elle and Vogue

**Hear about live music events via:** Facebook, JHBLive and word of mouth

**LSM Profile:** LSM 9 High

LSM 9 is in the top LSM grouping (8-10) which accounted for 23% of the South African population in 2012. These people tend to be male, educated to Matric and higher, earn around $1800 US per month, have bank accounts and good access to the Internet plus disposable income for participation in activities. Over 90% of these people own a private car.

**Venues attended:** Afrikan Freedom Station

**Nomsa**

**Age and sex:** 23-24 years old, female

**Lives:** Soweto

**Languages spoken:** First (Sesotho) Other (English, isiZulu and Sesotho sa Leboa)

**Education and employment:** Highest level of education was a Technikon and is currently employed part-time

**Top 4 personal expenses:** Clothes, arts events, eating out and hair/beauty

**Spare time:** Cinema, eating out, arts events and social media

**Preferred media:** TV (Mzansi Magic) Radio (SFM) Magazines (Grazia)

**Internet use:** Access through cell phone everyday

**Social media:** Facebook, WhatsApp, Twitter, Google + and YouTube

**Preferred websites:** Tumblr

**Hear about live music events via:** Social media, word of mouth and posters/flyers
LSM Profile: LSM 7 Low
LSM 6-7 grouping of people account for 34% of the population. These people tend to be female, educated to Matric and higher, earn around $700 US per month, have bank accounts and good access to the Internet plus they have increased full ownership of consumer durables. Over two thirds of these people will still catch mini taxis as their main mode of transport.

Venues attended: Soweto Theatre, Soweto Arts and Craft Fair and Niki’s Oasis

Polly

Age and sex: 21-22 years old, female
Lives: Soweto
Languages spoken: First (Sesotho) Other (English, isiZulu and Sesotho sa Leboa)
Education and employment: Highest level of education was a Technikon and is currently employed full-time
Top 4 personal expenses: Clothes, airtime, eating out and hair/beauty
Spare time: Drinks, DJs/live music, arts events and reading

Preferred media: TV (Vuzu) Radio (Metro FM) Magazines (Grazia)
Internet use: Access through cell phone mostly Mondays to Fridays
Social media: WhatsApp
Preferred websites: Live Mag SA
Hear about live music events via: Facebook, HilltopLive and JHBLive websites

LSM Profile: LSM 7 Low
LSM 6-7 grouping of people account for 34% of the population. These people tend to be female, educated to Matric and higher, earn around $700 US per month, have bank accounts and good access to the Internet plus they have increased full ownership of consumer durables. Over two thirds of these people will still catch mini taxis as their main mode of transport.

Venues attended: Soweto Theatre and Soweto Arts and Craft Fair
QUANTITATIVE

Demographics

Age

- **Online survey:** the online survey was slightly skewed to young audiences with 43% aged 21-to-29-years-old and 25% aged 30-to-39-years-old. 25% of the respondents were over 40 years.
- **In-person surveys:** the average age of the people surveyed in person was 35 years.

![Chart 11 Age Breakdown of the Online Survey Respondents](image)

Gender

- **Online survey:** there was even representation of female and male respondents with 51% of respondents being male and 49% female.
- **In-person surveys:** there was a light skew to female in-person respondents (63%) compared with men (37%).
Racial Identity

- **Online survey:** 58% of respondents identified themselves as Black, followed by 23% White, 6% Asian and 3% Coloured.
  - 10% identified themselves as either African or South African.
  - 87% of online respondents were born in South Africa.
  - 62% were born in Gauteng, followed by 12% in KwaZulu Natal and 7% in the Eastern Cape.

- **In-person survey:** 50% of the in-person respondents identified themselves as Black, 34% African and 13% South African.
  - During observation at the events in the venues located outside of Johannesburg, there was very little racial diversity in the audience, with the dominant audience identified as Black.

First Language Spoken

- **Online survey:** the dominant first language spoken of the online survey respondents was English (33%) followed by isiZulu (20%) and isiXhosa (11%).
- **In-person surveys:** the first languages spoken was more balanced between English (31%) and isiZulu (27%) followed by Sesotho (22%) and isiXhosa (12%).
- This skew towards English speakers could be influenced by the fact that the surveys were conducted in English. It’s recommended to conduct future surveys in more than one
Chart 13 First Language Spoken Breakdown of the Online Survey Respondents

Relationship Status

- 50% of the online respondents were single with 43% of respondents married, in a domestic partnership or civil union, or cohabiting with a significant other.

Where They Live

- **Online survey**: 70% of respondents lived in areas in the City of Johannesburg, 14.5% in the City of Tshwane, 11% Ekurhuleni, 3% West Rand and 1.5% Sedibeng.
  - About 30 respondents cited they currently lived outside of Gauteng, however their responses were included in the survey analysis as they were familiar with the Gauteng live music scene and therefore felt their responses relevant to the study.
In-person survey: The three venues located outside of the City of Johannesburg were located in (KwaThema) Ekurhuleni, (Khutsong South) West Rand and (Vereeniging) Sedibeng. Approximately 90% of the In-person survey respondents lived within the same municipality as their venue they had attended.

Education and Work

Online survey: Almost half of respondents had completed a degree or post-graduate degree.
- 58% of respondents worked full-time or part-time and 16% were students.
- 65% of households earned under R363 930 per year, with the average number of people per household equal to 3.5.
- The online respondents come from a broad spread of professions, with the exception of creative/arts professionals who accounted for 28% of responses.

In-person survey: 48% of the in-person survey respondents had completed a university degree, while Matric was the highest level of education to date of 43% of the respondents.
- 71% of respondents were employed, 18% self-employed and 11% unemployed.
Chart 15 Education Levels of Online Respondents

Chart 16 Professions of Online Respondents
Other Arts/Culture Preferences

- **Online survey:** The online respondents were most likely to attend the theatre (62%), followed by the cinema (56%), then poetry/spoken word events (36%).
  - Gender Comparison
    - Women were more likely to attend the cinema (62% to 50%) and dance (32% to 17%) than men.

**Chart 17 Online Respondents’ Arts/Culture Preferences**

- ‘Race’ Comparison
  - All racial groups cited theatre and cinema as their preferred arts and culture events, however Black respondents also cited poetry/spoken word.
  - Black and Coloured respondents attended dance more than White and Asian respondents.
  - White respondents were much less inclined to attend poetry/spoken word events than other ‘races’.

- Age Comparison
  - While theatre was preferred among most age groups, it wasn’t attended by the youngest respondents, 18-to-20-year-olds. That age group wasn’t as interested in art exhibitions as those people over 21 years.
  - Dance and poetry/spoken word were more popular with people under 50
**Media and Consumption**

**General Spending**

- **Online survey:** The respondents spent the bulk of their monthly income on necessities like food and groceries, communication (i.e. airtime, data and cell phones), transport and household services.
  - However, 35% of respondents indicated that culture and recreation was one of the top four items they spend money on each month.

- **In-person survey:** The top items of the people surveyed in person outside of Johannesburg were spent their money on each month were groceries, clothes and transport.

**Spare Time**

- **Online survey:** Live music and DJs, as well as arts and culture events, featured prominently in their chosen activities for their spare time, followed by eating out and reading books.

- **In-person survey:** The in-person survey respondents spent their spare time listening to music, reading and socialising with friends.

---

**Table 19 Online Respondents’ Arts/Culture Preferences ‘Race’ Comparison**

<table>
<thead>
<tr>
<th>What other arts and culture events do you most like to attend?</th>
<th>Asian</th>
<th>Black</th>
<th>Coloured</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>66.67</td>
<td>48.33</td>
<td>68.75</td>
<td>63.46</td>
</tr>
<tr>
<td>Dance</td>
<td>16.67</td>
<td>30.00</td>
<td>31.25</td>
<td>11.54</td>
</tr>
<tr>
<td>Theatre</td>
<td>66.67</td>
<td>56.67</td>
<td>68.75</td>
<td>65.38</td>
</tr>
<tr>
<td>Poetry or spoken word</td>
<td>16.67</td>
<td>48.33</td>
<td>25.00</td>
<td>7.69</td>
</tr>
<tr>
<td>Art exhibitions</td>
<td>33.33</td>
<td>45.83</td>
<td>31.25</td>
<td>48.08</td>
</tr>
</tbody>
</table>

**Table 20 Online Respondents’ Arts/Culture Preferences Age Comparison**

<table>
<thead>
<tr>
<th>What other arts and culture events do you most like to attend?</th>
<th>18-20</th>
<th>21-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50-59</th>
<th>60 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>50.00</td>
<td>53.41</td>
<td>53.70</td>
<td>57.69</td>
<td>77.78</td>
<td>5.38</td>
</tr>
<tr>
<td>Dance</td>
<td>35.71</td>
<td>23.86</td>
<td>31.48</td>
<td>23.08</td>
<td>11.11</td>
<td>15.38</td>
</tr>
<tr>
<td>Theatre</td>
<td>21.43</td>
<td>60.23</td>
<td>64.81</td>
<td>76.92</td>
<td>72.22</td>
<td>61.54</td>
</tr>
<tr>
<td>Poetry or spoken word</td>
<td>28.57</td>
<td>44.32</td>
<td>35.19</td>
<td>34.62</td>
<td>16.67</td>
<td>15.38</td>
</tr>
<tr>
<td>Art exhibitions</td>
<td>7.14</td>
<td>43.18</td>
<td>53.70</td>
<td>50.00</td>
<td>61.11</td>
<td>61.54</td>
</tr>
</tbody>
</table>
Media Consumption

- **Online survey:** DSTv was watched by over 58% of respondents followed by ETV and SABC1.
  - The most popular radio stations were Kaya FM and Metro FM, followed by 702 Talk Radio.
  - The Mail and Guardian was the most popular newspaper followed by the Times and the Star.
  - There wasn’t a dominant magazine read by all respondents, however 16% of respondents read DRUM, followed by True Love and YOU.
  - The most popular social media platform which the respondents regularly visited was Facebook (90%), followed by WhatsApp (69%) and then Twitter (46%).
  - There was a wide range of websites people regularly visited, however News 24, Mail and Guardian, Computicket and Bizcommunity were all mentioned most, excluding Facebook, Google, YouTube and Twitter.
- **In-person survey:** SABC was the most watched TV station followed by eTV then VUZU, SuperSport and ENCA.
  - The most listened to radio station was Metro FM, followed by Kaya FM, Lesedi FM and YFM.
  - The most read newspaper was the Daily Sun, followed by the Sowetan then The Star and The Times.
  - The most popular social media platform which the respondents regularly visited was Facebook and then WhatsApp

![Chart 19 Online Respondents’ Social Media Preferences](chart19.png)
### Table 21 Online Respondents, Most Visited Websites

<table>
<thead>
<tr>
<th>Website</th>
<th>Mentions</th>
<th>Website</th>
<th>Mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>68</td>
<td>OkayAfrica</td>
<td>4</td>
</tr>
<tr>
<td>Google</td>
<td>48</td>
<td>iTunes</td>
<td>4</td>
</tr>
<tr>
<td>YouTube</td>
<td>39</td>
<td>BuzzFeed</td>
<td>4</td>
</tr>
<tr>
<td>News 24</td>
<td>37</td>
<td>Daily Maverick</td>
<td></td>
</tr>
<tr>
<td>Twitter</td>
<td>20</td>
<td>Property 24</td>
<td>4</td>
</tr>
<tr>
<td>Computicket</td>
<td>13</td>
<td>Sowetan Live</td>
<td>4</td>
</tr>
<tr>
<td>Mail and Guardian</td>
<td>12</td>
<td>Zando</td>
<td>4</td>
</tr>
<tr>
<td>Bizcommunity</td>
<td>9</td>
<td>Mr Price</td>
<td>3</td>
</tr>
<tr>
<td>Gumtree</td>
<td>7</td>
<td>Nedbank</td>
<td>3</td>
</tr>
<tr>
<td>Supersport</td>
<td>7</td>
<td>Women’s Health</td>
<td>3</td>
</tr>
<tr>
<td>Pinterest</td>
<td>7</td>
<td>ZA Mob</td>
<td>3</td>
</tr>
<tr>
<td>Soundcloud</td>
<td>7</td>
<td>Career Junction</td>
<td>3</td>
</tr>
<tr>
<td>BBC</td>
<td>6</td>
<td>JHBLive</td>
<td>3</td>
</tr>
<tr>
<td>Instagram</td>
<td>6</td>
<td>Kalahari</td>
<td>3</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>6</td>
<td>Amazon</td>
<td>3</td>
</tr>
<tr>
<td>Times Live</td>
<td>6</td>
<td>IOL</td>
<td>3</td>
</tr>
<tr>
<td>OLX</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 7.3 Interview Questions

#### QUALITITAVE

**Draft Interview Questions Venue Staff**

1. Name
2. Role and responsibilities in the organisation
3. Time with the organisation

**Audience**

4. Describe your organisation in 4 words
5. What type of experience do you want your audience to have here?
6. How do you think you audience feels when they see live music here?
7. Do you think this venue is open to all audiences? If yes or no, why?
8. Who is this organisation’s primary audience?
9. Do you attract young audiences? Do you want to attract young audiences? If yes or no why?
10. How do you think you could attract young audiences?
11. What is this organisation’s ideal audience? Do you feel you are attracting that audience? If so how?
12. What do you know about your audiences? How do you find this out?
13. What would you like to know about your audiences?
14. What level of loyalty do you have with audiences? How do you know this?
15. What are the barriers to people coming to your venue?

**Audience development**

16. What is your understanding of audience development?
17. Is there someone in your organisation responsible for audience development? If so, what is their background and level of experience?
18. What would be your ideal resourcing and skills needed to grow and keep your audiences?
19. How do you currently grow and keep your audiences?
20. What would you like to do to grow and keep your audiences?
21. How do you work with artists, promoters and partners to market your live events?
22. Do you feel artists and promoters are committed to attracting audiences to their events at your venue or do you they expect your venue to attract the audiences?
23. What are the barriers or challenges to growing and keeping your audiences?
24. Do you feel there is enough support for venues and artists/promoters to develop their audiences? If yes or no, why?
25. How could you be supported to develop your audiences?
26. How could artists/promoters be supported to develop audiences?

**Draft Interview Questions (18-to-25-year-old audiences)**

The first half of the questions will be sent to the interviewee in an online/printed survey prior to the interview, with the second half of the open-ended questions asked in a semi-structured one-on-one interview.

**Demographics**

1. **What is your age?**
   - 15 to 16 / 17 to 18 / 19 to 20 / 21 to 22 / 23 to 24 / 25 to 26 / 26 or older
2. **What is your gender?** Female / Male
3. **Where do you live?** Province Suburb
4. **Where were you born?** Country Province
5. **Are you a citizen of South Africa?** Yes / No
6. **If not, which country do you have citizenship for?**
7. **Do you identify yourself as any of these? Please select** Black / Coloured / Asian / White / Other (please specify)
8. **What is your first language?** Afrikaans / English / Ndebele / North Sotho – Pedi / South Sotho / Swazi / Tsonga / Tswana / Venda / Xhosa / Zulu / Other (please specify)
9. **What other languages do you speak?** Afrikaans / English / Ndebele / North Sotho – Pedi / South Sotho / Swazi / Tsonga / Tswana / Venda / Xhosa / Zulu / Other (please specify)
10. **Which statement best describes your education to date?**
   - Some primary school
   - Finished primary school
   - Some high school
   - Matric
   - Technikon
   - University degree
   - Other (please specify)
11. **Do you work?**
   - Full time
   - Part time
   - Internship
   - Volunteer
   - Unemployed
12. **If you are unemployed how long have you been unemployed for?**
   - 0 - 6 months
   - 6 months - 1 year
   - 1 year - 18 months
   - 18 months - 2 years
   - 2 - 3 years
   - Over 3 years
13. **From the list below please tick the top four items that you spend your money on?**
   - Airtime
   - Alcohol
   - Books
   - Cinema
   - Clothes
   - DJs or live music
   - Other arts events
   - Eating out
   - Computer games
   - Education
   - Education/child care for dependent
   - Gym membership
   - Hair and beauty
   - Magazines
   - Music
   - Other (please specify)
14. **Tick which top four activities you like to do in your spare time.**
   - Cinema
   - Drink
   - DJs or live music
   - Eat out
   - Family related activities
   - Arts events
   - Play computer games
   - Sport
   - Visit friends
   - Volunteer
   - Watch DVDs
   - Read
   - Surfing the net
   - Catching up on social media
   - Other (please specify)
15. **What is your favourite television channel?**
   - Choice Urban
   - eTV
   - MTVBase
   - Mzansi Magic
   - SABC1
   - SABC2
   - SABC3
   - Vuzu
   - Other (please specify)
16. **What magazines do you read?**
   - 17
   - Bona
   - Drum
   - Glamour
   - Grazia
   - GQ
   - Hype
   - Kickoff
   - Move
   - Rolling Stone
   - You
   - Other (please specify)
17. **Which radio stations do you listen to?**
   - 94.5Kfm
   - 94.7 FM
   - 5FM
   - East Coast Radio
   - Goodhope FM
   - Kaya FM
   - Lesedi FM
   - Metro FM
   - Motsweding FM
   - Thobela FM
   - Ukhozi FM
   - Umhlobo Wenene FM
   - YFM
   - Other (please specify)
18. **What cell phone have you got?**
19. **How do you mainly access the Internet?**
   - Cell phone
   - PC or laptop at home
   - PC or laptop at school or college
   - PC or laptop at work
   - PC at internet café or community centre
   - Other (please specify)
20. **What day of the week and time of the day do you mostly search the internet?**
21. **Which of the following social media sites do you regularly use?**
   - Facebook
   - Google+
   - Instagram
   - Mxit
   - Pinterest
   - Twitter
   - YouTube
   - Vimeo
   - Whatsapp
22. **If you use Facebook, what day of the week and time of the day do you mostly use it?**
23. **If you use Twitter, what day of the week and time of day do you mostly use it?**
24. **What websites or blogs do you regularly go to?**
25. **How do you find out about live music events? How would you like to find out about live music events?**
26. **Which websites do you regularly visit to find out information about music and live music events?**
In-depth questions

Motivation

1. How does live music make you feel?
2. Why do you like to attend live music?
3. What impact does live music have on your life?
4. What do you hope to get out of a live music event? Prompt..Have an interesting night out / Have fun with friends / As a treat to relax or escape / Be intellectually stimulated / Have a new experience / See exceptional music talent / To be seen by the cool people
5. What is most important to you when deciding to attend a live music event? Prompt...Artist, music genre, experience, venue, location, who will be there i.e. audience (‘race’ or age), price, timing (day of week or time), food or drinks available, just something to do?
6. Do you like to attend live music with your family, friends or alone?
Consumption

7. What experience do you hope to have at a live music event?
8. How do you experience live music? Prompt...I dance all night long, I sit and listen to the artist, I spend the night at the bar with my friends...the music is just for background, I smoke so spend most of the time in the smoking section.
9. Where do you like to see live music? Why?
10. What types of venues or spaces do you like or would you like to see live music? Why?
11. Are there specific venues you like to see live music? Why?
12. What is important to you when seeing live music at a venue? Prompt....parking, cheap drinks, somewhere to sit, dancefloor, dinner/food
13. What music genres do you like to see live at venues? Prompt with genres if not forthcoming...Electronic / Hip Hop / House / Gospel / Indie / Jazz / Kwaito / Pop / R & B / Rock / Other (please specify)
14. Is there a music genre you like to see live most? Why? How often?
15. Is there a music venue you like to go to most? Why? How often?
16. Is there a location you most like to see live music? Why? How often? Prompt...Braamfontein, Soweto, Sandton
17. Is there an amount of money you like to spend on a live music event? What is the maximum you would spend on a live music event and for what type of event would that be or venue?
18. How frequently do you see live music? Why?
19. Do you like to attend other arts events? If so what? How often? Where?

Barriers

20. Do you choose the live music or venue based on location or proximity? Why?
21. Do you choose the artists or venues based on what type of audience is associated with the venue? Prompt...‘race’, age, sex, education-level, location.
22. Are their certain venues or locations you wouldn’t feel welcome at? OR Do you feel all venues or locations are open to all people in Johannesburg?
23. How do you travel to live music events? Prompt...Taxi, car, cab, bus, train, catch a ride with friends?
24. What stops you from attending live music more often? OR What stops you from attending this venue more often?

In-person Survey Questionnaire (Attachment 1)

Online Survey Findings Questions and Findings Summary (Attachment 2)
7.4 Research Partners

Researcher

Elizabeth O’Connor is a marketing and public relations professional with experience working in the creative and arts sector in Australia, the United Kingdom and sub-Saharan Africa. During her time in South Africa, Elizabeth was the Digital Marketing Manager at youth marketing agency, Livity Africa as well as undertaking her Masters in Arts (Policy/Management) at the University of Witwatersrand. Elizabeth’s professional experience with audience development has been largely developed in the United Kingdom as an arts marketing manager for a live music and arts venue, Rich Mix London. However, her experience with live music and audience development in South Africa and sub-Saharan Africa for Livity Africa and the Lake of Stars music festival brings a detailed understanding of the local context. Follow her on Twitter @bethoconnor3.

Concerts SA

Concerts SA is a joint South African/Norwegian live music development project housed under the auspices of the Stakeholder Hub within The SAMRO Foundation. The project receives financial, administrative and technical support from the Norwegian Ministry of Foreign Affairs, SAMRO and Concerts Norway. The project aims to support the growth of the live music sector in South Africa through research, skills development, competence building and, through its work with venues and promoters, develop regular, sustainable performance platforms. It also aims to develop an interest in and appreciation of live music by showcasing music performances and conducting workshops at schools. www.concertssa.co.za

Wits School of the Arts

Through advancing excellence in research, teaching and learning, the Wits School of Arts combines critical inquiry with artistic practice in ways that engage in transformative ways with our contemporary urban, African and global contexts. http://wsoa.wits.ac.za/

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