19t ASSITEJ World Congress and Performing Arts Festival: A Marketing Analysis

17 - 27 May 2017

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1. Introduction

The ASSITEJ SA was established in July 2007 and is one of the younger members of the ASSITEJ family. ASSITEJ SA comprises a network of around 102 theatre companies and individual artists and 250 schools, as well as supporting membership originating from related fields. They believe that every child and young person deserves access to the arts, and especially to live theatre, and these companies focus on:

- Creating access to theatre for young people,
- Supporting and developing emerging and established artists,
- Empowering arts' education and
- Connecting and advocating for the arts in the lives of young people.

The 19th ASSITEJ World Congress and Performing Arts Festival was hosted in Cape Town (South Africa), based at the Cape Town City Hall and surrounding venues. Different symposiums, seminars, performances and workshops could be enjoyed during this ten-day festival. The festival programme of performances was rich and diverse and comprised nearly 50 productions in total, of which 25 theatre productions were from countries across the world (North America, Central America, South America, Europe, Middle East, Asia and Africa). The festival targeted audiences from zero to eighteen years of age and each production had three to six performances each. Due to the popularity of this festival, it has become important to understand the market as well as the market's preferences. The purpose of this research was to analyse the festival as well as conference markets with a view to assist with strategic planning and marketing to ensure the festival's sustainability in a dynamic market.

2. Aims of the study

This research project had the following primary research aims:

- To determine the visitor profile of respondents to the 19th ASSITEJ World Congress and Performing Arts Festival with reference to the demographic profile, spending patterns, motives and satisfaction levels.
- To determine the visitor profile of respondents participating in the ASSITEJ Conference 2017 with reference to the demographic profile, spending patterns, satisfaction levels and conference preferences.
- To determine the visitor profile of younger festival-goers as the future market of this festival with reference to demographic profile, exposure to theatre and their experiences at the festival.
- To determine the economic value of the festival to the region.

3. Method of study

In an attempt to achieve the above-mentioned aims, qualitative and quantitative research was conducted. For the quantitative phase two questionnaires were developed:

1. For the visitor survey the following aspects were measured:
    - Demographic profile
    - Economic considerations
    - Respondents' satisfaction
    - Theatre performance preferences
    - Travel motives
    - The value of the festival
2. For the conference survey:
    - Demographic profile
    - Economic considerations
    - Respondents' satisfaction
    - Travel motives
    - Conference session preferences

For the qualitative phase interviews were conducted with a variety of younger participants where a more in-depth approach was taken to review their experiences of the festival.

3. For the visitor interviews the following aspects were measured:
    - Demographic profile
    - Participation in arts/drama and dance classes
    - Theatre preferences
    - Experiences at the festival.

The surveys were conducted from 18 to 23 May 2017 to obtain answers to the questions above. For the quantitative and the qualitative research convenience sampling was implemented to select the sample of respondents. Respondents attending theatre productions (at the different venues) and those partaking in the conference were asked to complete questionnaires. In total, 254 completed festival visitor and 78 completed conference questionnaires were obtained at the 19th ASSITEJ World Congress and Performing Arts Festival 2017.

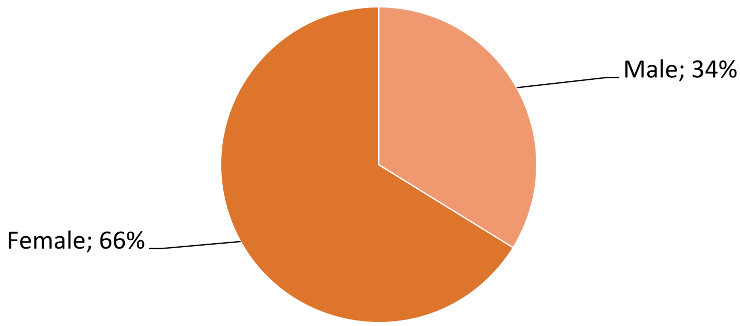
Forty-three interviews were conducted until the data reached saturation and the same type of answers occurred. This was before and in-between shows at the different venues.

4.1 Quantitative Research Results: Festival respondents

Section A: Demographic Information

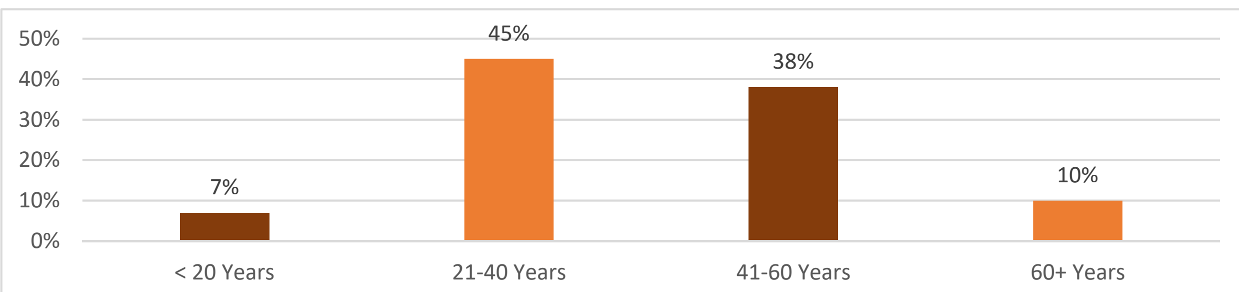
4.1.1 Gender

The figure indicates that most of the respondents were female (66%), whereas 34% were male.



4.1.2 Age

Forty-five percent (45%) of the respondents were between ages 21 and 40 years, followed by 38% who were between ages 41 and 60 years. Furthermore, 10% were over the age of 60 years, whereas only seven percent (7%) of the respondents were younger than 20 years. The average age of respondents was 40 years.



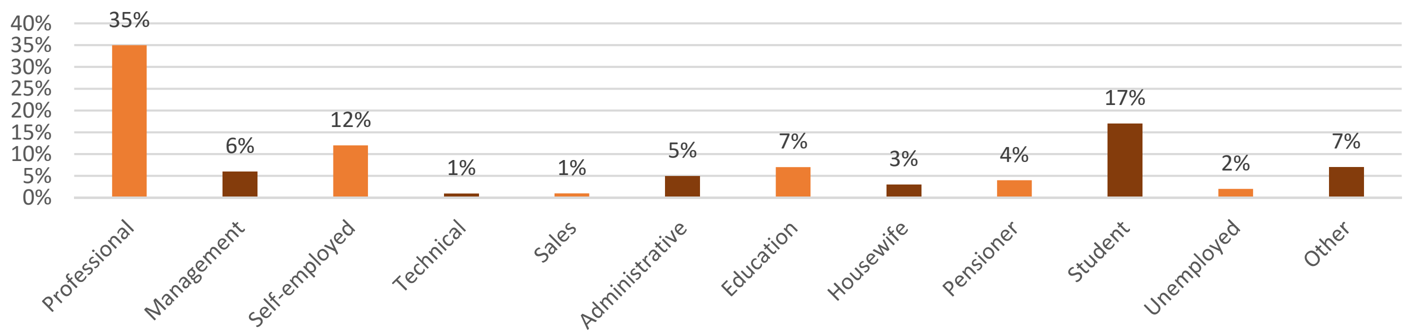
4.1.3 Home Language

The largest group of respondents (50%) was English speaking, followed by nine percent (9%) who spoke Afrikaans and eight percent (8%) who spoke Xhosa. Four percent (4%) of the respondents spoke either Danish or German respectively. Twenty-five percent (25%) of the respondents spoke other languages such as French, Japanese, Korean, Spanish, Portuguese and Persian.

Language	Percentage
English	50%
Afrikaans	9%
Xhosa	8%
German	4%
Danish	4%
Other Languages	25%

4.1.4 Occupation

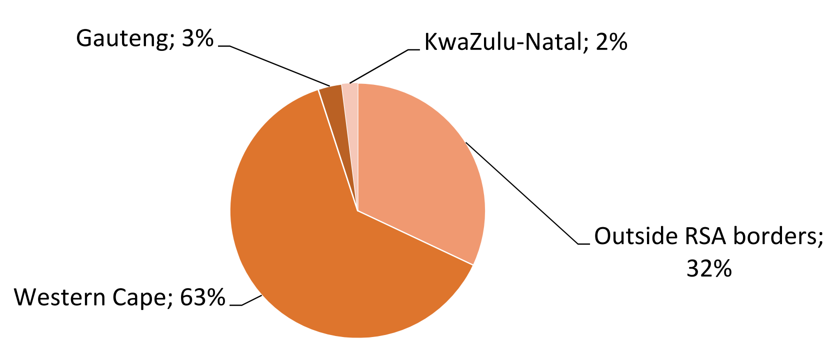
More than one third of the respondents (35%) are in a professional occupation, followed by students (17%) and self-employed respondents (12%). Other categories (7%) included actors and actresses, dancers and dance teachers.



4.1.5 Residential Information

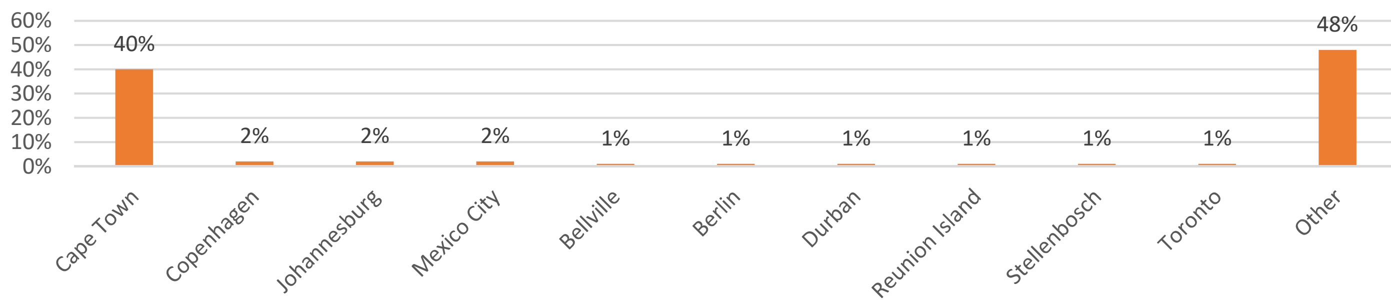
4.1.5.1 Province of residence

Sixty-three percent (63%) of the respondents are residents of the Western Cape Province. This is followed by Gauteng with three percent (3%) and KwaZulu-Natal (2%). Thirty-two percent (32%) of the respondents are from outside the borders of South Africa, indicative of an international appeal and presence.



4.1.5.2 Town/ City of residence

The figure indicates that forty percent (40%) of the respondents' hometown or city is Cape Town. Two percent (2%) of the respondents were from Copenhagen, Johannesburg and Mexico City respectively followed by Bellville, Berlin, Durban, Reunion Island, Stellenbosch and Toronto each representing one percent (1%). Forty-eight percent (48%) of the respondents' home town or city fell under the category Other, with towns/ cities such as Amsterdam, Brazil, Denmark, Hong Kong, London, Madrid, Mumbai and Upington.

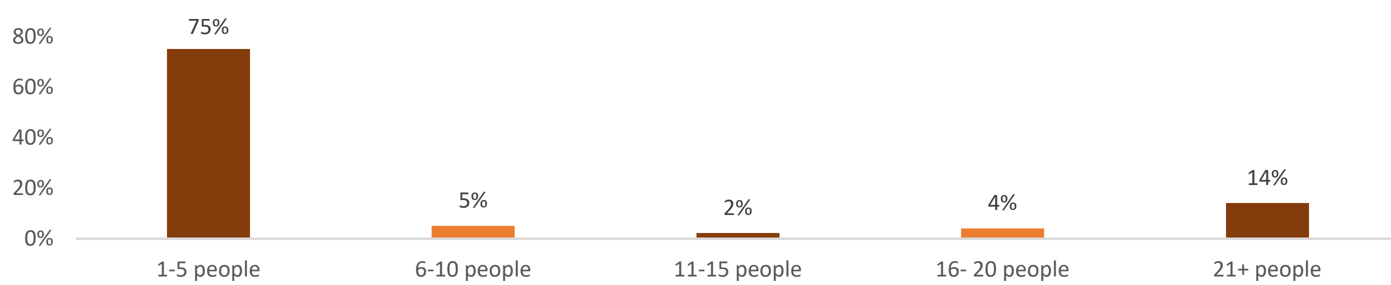


Section B: Visitor Behaviour

4.1.6 Travel group

4.1.6.1 Number of respondents in travelling group

Three quarters of the respondents (75%) travelled in groups of one to five people, followed by five percent (5%) who travelled in groups of six to ten people. Two percent (2%) of the people travelled in groups of eleven to fifteen people, four percent (4%) sixteen to twenty people and fourteen percent (14%) travelled in groups larger than twenty-one people. Two respondents travelled in groups of sixty-five people. On average, respondents travelled in groups of 5.47 people.



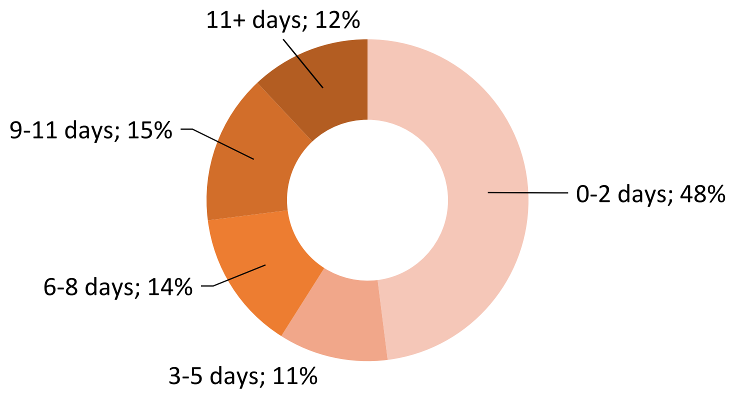
4.1.6.2 Percentage of respondents paying for others

Nearly four fifths of the respondents (79%) paid for up to two people, followed by sixteen percent (16%) who paid for three to five people, one percent (1%) for six to eight people and four percent (4%) of the respondents paid for more than nine people. On average respondents paid for 2.34 people.

Number of people	Percentage
0-2 people	79%
3-5 people	16%
6-8 people	1%
9+ people	4%

4.1.6.3 Average days spent at festival

The largest category of respondents stayed at the festival for up to two days (48%), followed by 15% who stayed nine to eleven days, 14% stayed six to eight days and 11% stayed three to five days. Twelve percent (12%) of the respondents stayed more than eleven days at the festival. The average number of days that respondents stayed at the 19th ASSITEJ World Congress and Performing Arts Festival is 4.98 days.



4.1.6.4 Average nights spent in the area

Fifty-nine percent (59%) of the respondents stayed up to four nights at the festival, followed by nine to twelve nights (18%), five to eight nights (14%) and thirteen to sixteen nights (8%). Only one percent (1%) of the respondents stayed at the festival longer than seventeen nights. The average number of nights that respondents stayed at the 19th ASSITEJ World Congress and Performing Arts Festival is 4.55 nights.

Nights spent	Percentage
0-4 nights	59%
5-8 nights	14%
9-12 nights	18%
13-16 nights	8%
17+ nights	1%

Section C: Festival Behaviour

4.1.7 Ticket purchase

4.1.7.1 Number of tickets bought

More than half of the respondents (57%) bought up to two tickets, followed by three to five tickets (15%) and nine to eleven tickets (11%). This is followed by six percent (6%) who bought six to eight and twelve to fourteen tickets respectively. The average number of tickets bought for the 19th ASSITEJ World Congress and Performing Arts Festival is 4.35 tickets.

Number of tickets bought	Percentage
0-2 tickets	57%
3-5 tickets	15%
6-8 tickets	6%
9-11 tickets	11%
12-14 tickets	6%
15+ tickets	5%

4.1.7.2 Number of free tickets received

Eighty-four percent (84%) of the respondents received up to two free tickets followed by three to five tickets (7%), six to eight tickets (4%) and nine to eleven tickets (3%). Two percent (2%) of the respondents received more than twelve tickets for free. The average number of free tickets received for the 19th ASSITEJ World Congress and Performing Arts Festival is 1.57 tickets.

Number of free tickets received	Percentage
0-2 tickets	84%
3-5 tickets	7%
6-8 tickets	4%
9-11 tickets	3%
12+ tickets	2%

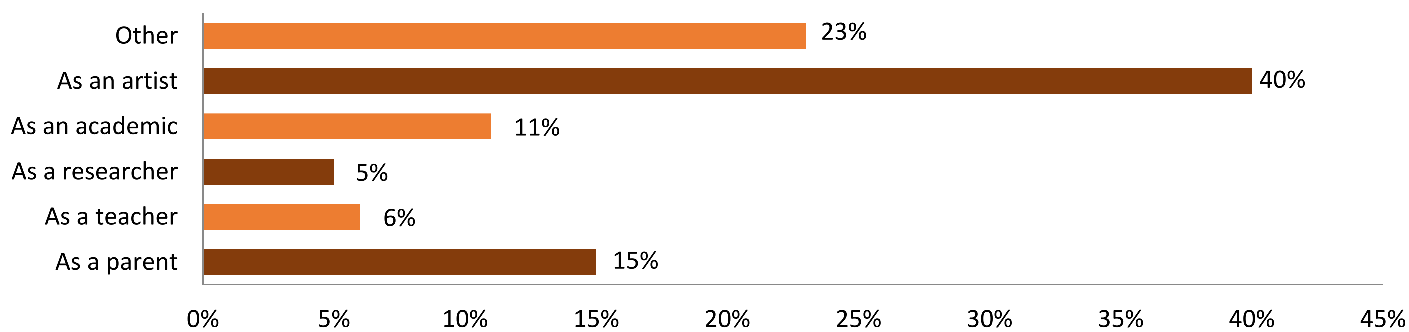
4.1.8 Type of accommodation used

The majority of respondents (42%) were local residents who used their own accommodation, followed by respondents who stayed in Hotels (28%), with their family or friends (10%) and registered Guesthouses or B&B's (8%). The smallest number of respondents stayed at camping grounds (1%).

Type of Accommodation	Percentage
Local residents	42%
Family or Friends	10%
Registered Guesthouse or B&B	8%
Hotel	28%
Camping	1%
Rent a house	7%
Day visitor	2%
Other	2%

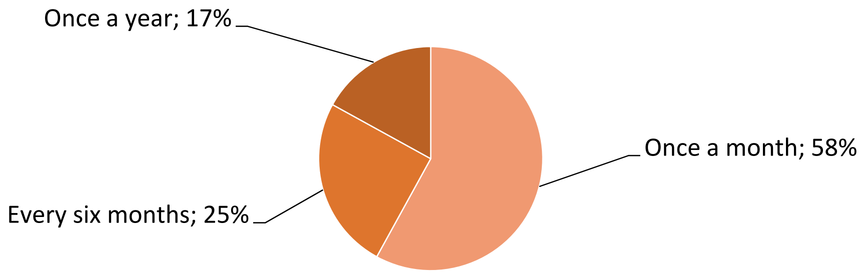
4.1.9 Main reason for visiting the festival

The figure indicates that forty percent (40%) of the respondents visiting the festival was artists followed by parents (15%) and academics (11%). Twenty-three percent (23%) of the respondents claim that their main reason for visiting the festival was because of other reasons such as: volunteers, producers, designers and entertainers.



4.1.10 Theatre performance attendance

Fifty-eight percent (58%) of the respondents indicated that they attend theatre productions once a month followed by every six months (25%) and once a year (17%).



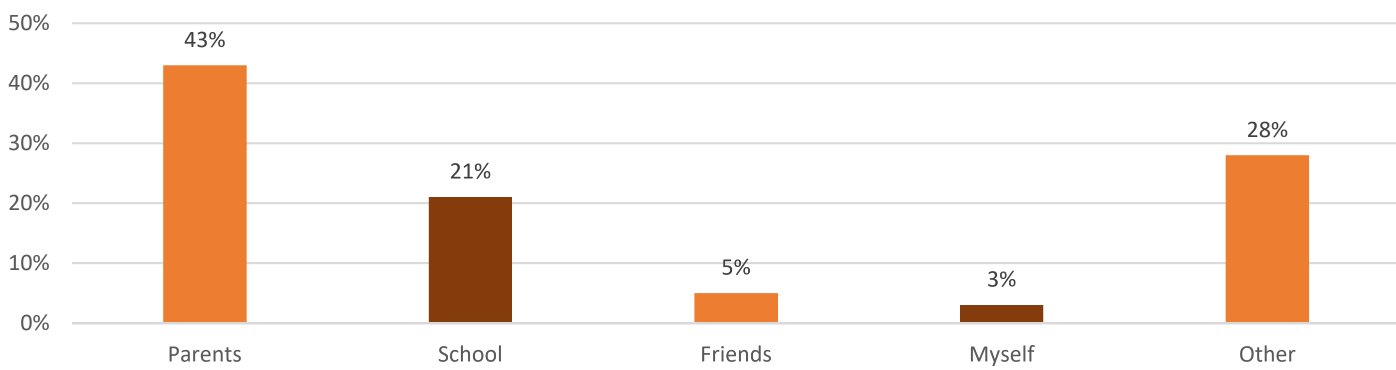
4.1.11 Age exposed to first theatre production

The majority of respondents (68%) were first introduced to theatre productions before their tenth birthday, followed by respondents between ages eleven and twenty (25%). Only two percent (2%) of the respondents was introduced to theatre productions after the age of thirty. The average age of respondents introduced to theatre productions for the first time is ten years, which supports the existence and importance of this festival.

Age category	Percentage
1-10 years	68%
11-20 years	25%
21-30 years	5%
31+ years	2%
Average age	9.67 years

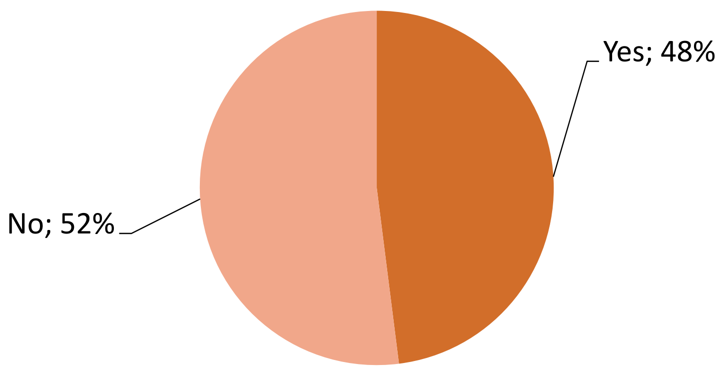
4.1.12 Introduction to performing arts

Forty-three percent (43%) of the respondents were introduced to performing arts by their parents, followed by twenty-one percent (21%) who were introduced by their different schools, five percent (5%) by their friends and three percent (3%) by themselves. Twenty-eight percent (28%) of the respondents were introduced by other people and organisations such as their churches, work environment and family members.



4.1.13 First time visit to Cape Town

Slightly more than half of the respondents (52%) said that is was not their first time visiting Cape Town, whereas 48% answered that it indeed was.



4.1.14 Average Spending

The highest spending categories included transport to the festival (R2 046.40), accommodation (R1 624.96), restaurants (R426.12) and food (R226.49). The average amount respondents paid per group visiting the 19th ASSITEJ World Congress and Performing Arts Festival was R4 650.03.

Aspects	Average amount spent
Accommodation	R1,624.96
Food	R226.49
Restaurants	R426.12
Transport to the festival	R2,046.40
Transport during the festival	R146.65
Productions	R58.99
Shopping	R99.19
Parking	R7.24
Other expenses not listed above	R14.00
Total average spending	R 4 650.03

R4650.03

The average amount respondents had spent per group

4.1.15 Festival attendance

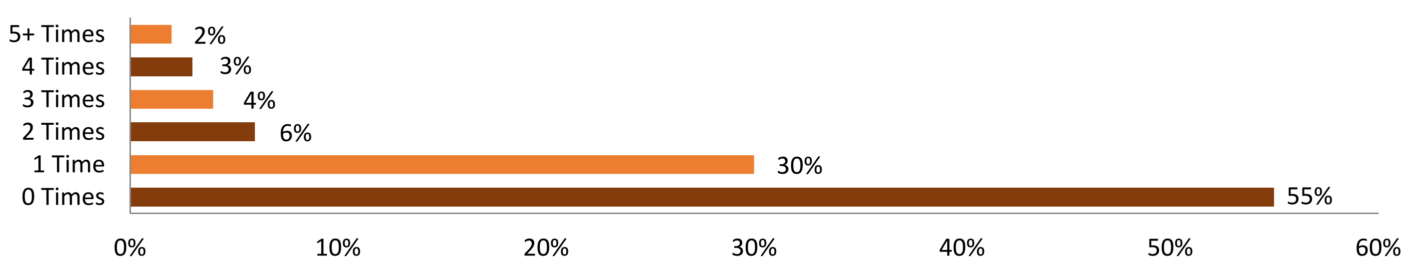
In this particular question, respondents were asked to rate the importance of why they attend the festival. A Likert scale was used (where '1' = not at all important and '5' = extremely important) and the following reasons scored the highest averages out of five:

- To enjoy the festival experience (4);
- Quality of productions and events (3.9);
- The festival provides a unique experience (3.9);
- Variety of productions and events (3.8); and
- The festival promotes cultural inclusiveness (3.8).

Reason	Mean Value (Std. Deviation)	Frequency
To get away from my normal routine	2.8(±1.415)	Important
To relax	2.9(±1.348)	Important
To spend time with family and friends	3.0(±1.424)	Important
To enjoy the festival experience	4.0(±1.055)	Very important
To meet new people	3.6(±1.349)	Very important
This festival is different from other festivals	3.4(±1.272)	Important
Variety of productions and events	3.8(±1.153)	Very important
Quality of productions and events	3.9(±1.128)	Very important
Festival offers activities for the whole family	3.1(±1.45)	Important
Sociable festival	3.3(±1.405)	Important
It is the closest festival to me	2.6(±3.689)	Important
To the benefit of my children	2.6(±1.713)	Important
To see well-known performers and artists	3.0(±1.469)	Important
It is an annual commitment	2.4(±1.423)	Less Important
To see artists and performers in person	3.3(±1.263)	Important
The festival provides a unique experience	3.9(±1.114)	Very important
The festival promotes cultural inclusiveness	3.8(±1.203)	Very important
The festival is value for money	3.1(±1.352)	Important
To participate in selected activities and events	3.4(±1.274)	Important
Part of my life-style	3.4(±1.363)	Important

4.1.16 Former festival attendance

The 19th ASSITEJ World Congress and Performing Arts Festival (2017) is the first visit for fifty-five percent (55%) of the respondents. This is followed by thirty percent (30%) that have attended the festival once, six percent (6%) that have attended the festival twice and four percent (4%) that have attended the festival three times.



4.1.17 Media influence on attendance

In this particular question, respondents were asked to rate to what extent different media platforms influenced their decision to attend the festival. A Likert scale was used (where ‘1’ = not at all and ‘4’ = completely) and the following media platforms scored the highest averages out of four:

- Word-of-mouth (2.9);
- Social Media (2.4);
- Other: brochures, culture connect and sponsors (2.4); and
- Festival Website (2.3).

Media platform	Mean Value (Std. Deviation)	Frequency
TV	1.2(±0.735)	Not at all
Radio	1.5(±1.007)	To a lesser extent
Festival Website	2.3(±1.246)	To a lesser extent
Festival Emails	2.0(±1.233)	To a lesser extent
Magazines	1.4(±0.793)	Not at all
Newspapers	1.6(±0.964)	To a lesser extent
Social Media	2.4(±1.519)	To a lesser extent
Word-of-Mouth	2.9(±1.240)	To a great extent

4.1.18 Regular attendance of other cultural festivals

Out of the 254 respondents, fourteen (5.5%) indicated that they attend the Grahamstown Arts Festival regularly, followed by eight (3.1%) respondents who attend the Cape Town Fringe. Some of the festivals not listed above, attended by respondents regularly are the Durban July, Suid-Ooster Festival, Taipei Arts Festival, Zabalaza Festival and Aardklop National Arts Festival.

Festival	Number of respondents	Average
April Festival	3	1.18%
Cape Town Fringe	8	3.15%
Festival Cervantino	4	1.59%
Grahamstown	14	5.5%
National Arts Festivals	6	2.36%
Woordfees	3	1.18%
Klein Karoo National Arts Festival	4	1.59%

DID YOU KNOW?

The Grahamstown Festival is attracting the same type of visitor as this festival

4.1.19 Satisfaction with the festival

In this particular question, respondents were asked to rate their satisfaction level towards different aspects of the festival. A Likert scale was used (where ‘1’ = strongly disagree and ‘5’ = strongly agree) and the following statements had the highest averages out of five:

- I believe that I did the right thing by attending the festival (4.3);
- Overall I am satisfied with the festival (4.2);
- I will recommend others to attend this type of festival (4.1);
- This festival is part of my lifestyle and culture (4);
- The festival programme is excellent (4);
- As a whole I am happy with the festival (4); and
- I enjoy talking about the festival (4).

Satisfaction with the festival	Mean Value (Std. Deviation)	Frequency
Overall I am satisfied with the festival	4.2(±0.776)	Agree
I believe that I did the right thing by attending the festival	4.3(±0.703)	Agree
This is the only festival of its kind that I attend	3.1(±1.329)	Neutral
The productions are of high quality	3.9(±0.825)	Agree
The festival fulfils my needs	3.8(±0.964)	Agree
This festival is part of my lifestyle and culture	4.0(±0.908)	Agree
The festival programme is excellent	4.0(±0.860)	Agree
As a whole I am happy with the festival	4.0(±0.822)	Agree
I enjoy talking about the festival	4.0(±0.962)	Agree
The festival is well organised	3.7(±1.012)	Agree
I am interested in buying memorabilia of the festival	3.0(±1.362)	Neutral
I am proud to have others know I attend this festival	3.9(±1.046)	Agree
I like to talk about the festival on social media	3.7(±1.174)	Agree
I will recommend others to attend this type of festival	4.1(±0.881)	Agree
Information of the festival is readily available	3.7(±0.981)	Agree
The facilities are adequate to host this type of festival	4.0(±0.853)	Agree
I am always interested in news concerning the festival	4.0(±0.855)	Agree

4.1.20 Value of the festival

Respondents were asked to rate the value of the festival by reading through different statements. A Likert scale was used (where ‘1’ = strongly disagree and ‘5’ = strongly agree) and the following statements scored the highest averages out of five:

- I am glad that I attend the festival (4.4);
- The festival is worth spending my time here (4.3); and
- It is fun attending the festival (4.3).

Value of the festival	Mean Value (Std. Deviation)	Frequency
It is worth spending my time here at the festival	4.3(±0.776)	Agree
It is worth spending my money here at the festival	4.2(±0.800)	Agree
I am glad that I attend the festival	4.4(±0.671)	Agree
I received various new ideas/ insights at the festival	4.1(±0.843)	Agree
This was a great learning experience	4.2(±0.734)	Agree
The experience here allowed me to imagine being someone else	4.3(±0.720)	Agree
The festival offers a variety of excellent performances	4.2(±0.748)	Agree

4.1.21 Attending performance evaluations

In this particular question respondents were asked to evaluate the current performance they were attending. A Likert scale was used (where '1' = strongly disagree and '5' = strongly agree) and the following statements scored the highest averages out of five:

- Watching others perform is captivating (4.2);
- Attending this was very pleasant (4.1);
- The setting was excellent for this production (4.1); and
- It stimulated my curiosity (4).

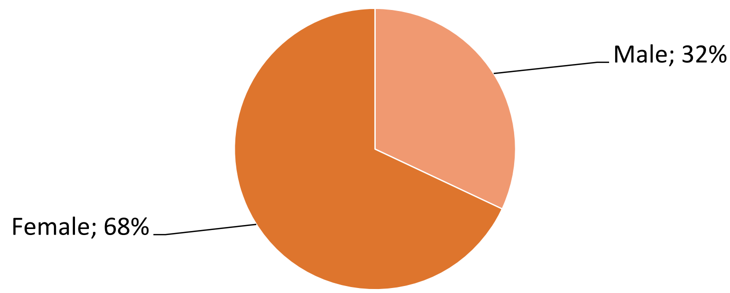
Evaluate the current performance you are attending	Mean Value (Std. Deviation)	Frequency
The experience has made me more knowledgeable	3.9(±1.007)	Agree
I learned a lot	3.8(±1.024)	Agree
It stimulated my curiosity	4.0(±0.861)	Agree
Attending this was very pleasant	4.1(±0.859)	Agree
The setting was excellent for this production	4.1(±0.836)	Agree
Watching others perform is captivating	4.2(±0.792)	Agree
I felt I played a character in the production	3.4(±1.224)	Neutral
While watching, it felt like I was living in a different time or place	3.7(±1.164)	Agree
The experience here allowed me to imagine being someone else	3.6(±1.116)	Agree
I completely escaped from reality	3.5(±1.258)	Agree

4.2 Quantitative Research Results: Conference respondents

Section A: Demographic Information

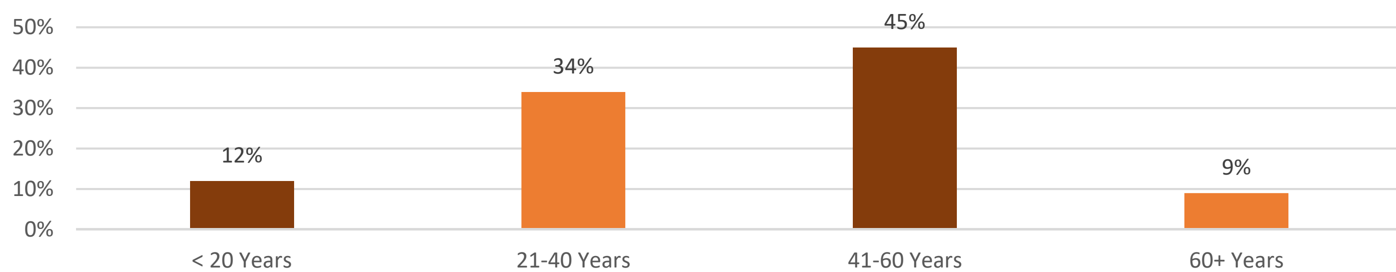
4.2.1 Gender

Nearly 70% of the respondents were female (68%) whereas 32% were male.



4.2.2 Age

Forty-five percent (45%) of the respondents are between ages 41 and 60 years, whereas 34% are between ages 21 and 40 years. The smallest group of respondents (9%) was older than 60 years. The average age of respondents was 40 years.



4.2.3 Home language

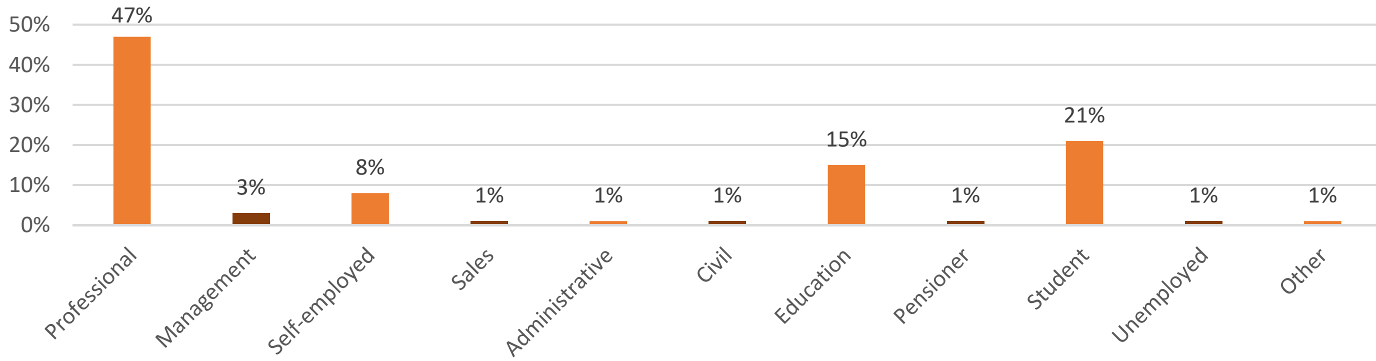
The largest group of respondents (36%) was English speaking, whereas 12% of the respondents spoke German. Twenty-nine percent (29%) of the respondents spoke other languages, such as Hindi, Greek, Norwegian and Tsonga.

Language	Percentage
English	36%
Afrikaans	6%
German	12%
Xhosa	8%
French	5%

Danish	4%
Other Languages	29%

4.2.4 Occupation

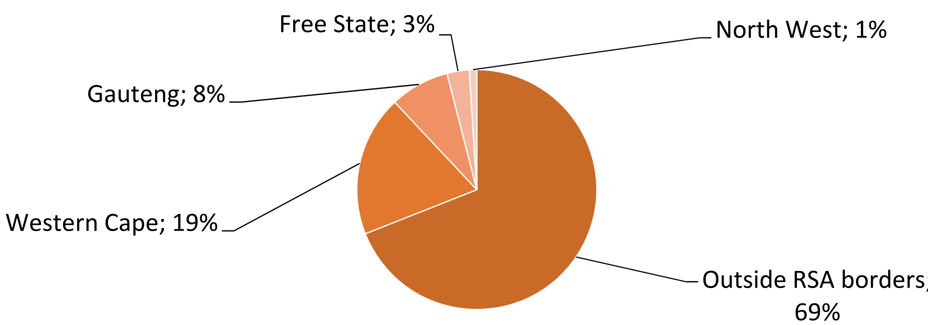
Nearly half of the respondents (47%) are in a professional occupation, this is followed by students (21%), Education (15%) and Self-employed (8%). The categories Sales, Administrative, Civil, Pensioner, Unemployed and other are all one percent (1%) respectively.



4.2.5 Residential information

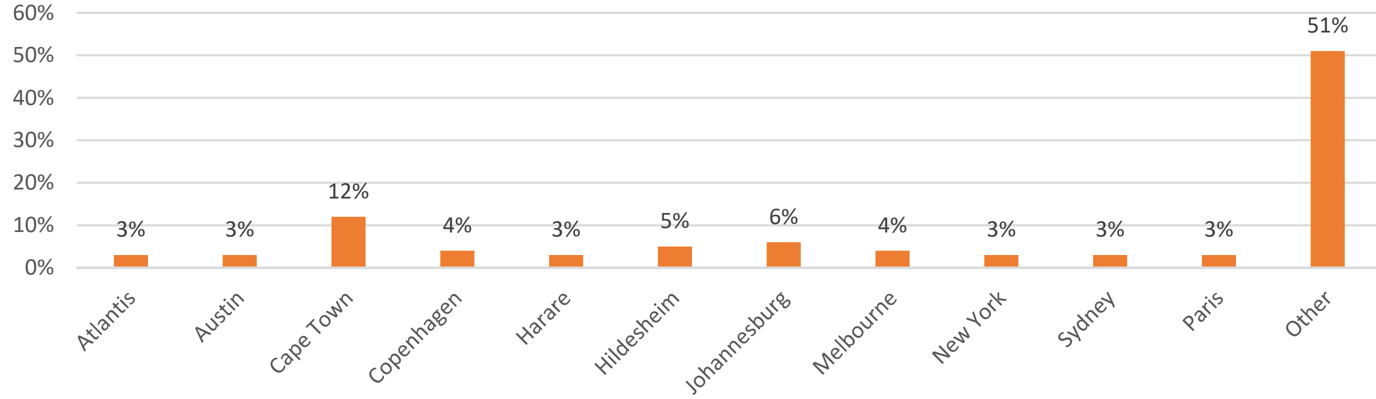
4.2.5.1 Province of residence

Most of the respondents (69%) were from outside the main borders of South Africa. The Western Cape Province had the second highest number of respondents (19%), mainly because the conference took place in the same province. This is followed by Gauteng (8%), Free State (3%) and North West (1%).



4.2.5.2 Town/ city of residence

As indicated in the previous question, 69% of the respondents were from outside the borders of South Africa. Respondents came from all over the world to visit this conference, including Copenhagen, Harare, Melbourne, New York, Sidney, Athens, and Hong Kong. South African respondents were mainly from Cape Town or Johannesburg.

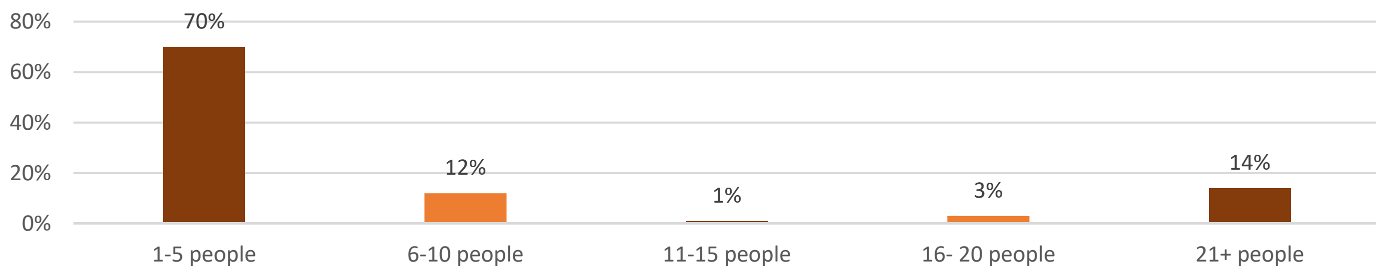


Section B: Conference Experience

4.2.6 Travel group

4.2.6.1 Number of respondents in travelling group

The highest number of respondents travel in groups of one to five people (70%), followed by groups of more than 21 people (14%). The smallest number of respondents travels in groups of 11 up to 15 people (1%). The average travelling group consists of nine respondents.



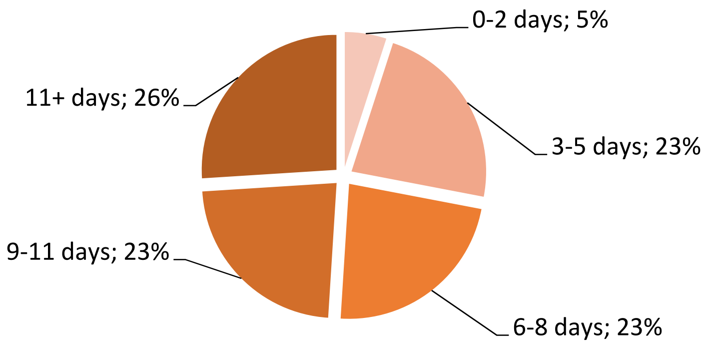
4.2.6.2 Percentage of respondents paying for others

Ninety percent (90%) of the respondents paid for themselves including one more person, whereas six percent (6%) paid for more than nine respondents. The average number of people for whom a typical respondent paid is 1.90.

Number of people	Percentage
1-2 people	90%
3-5 people	1%
6-8 people	3%
9+ people	6%

4.2.6.3 Average days spent at conference

Twenty-six percent (26%) of the respondents stayed more than eleven days at the conference, followed by three to five days, six to eight days and nine to eleven days with 23% respectively. The lowest number of respondents stayed up to two days (5%). On average, eight days were spent at the conference.



4.2.6.4 Average number of nights spent in area

Thirty-seven percent (37%) of the respondents spent between five and eight nights in the area, followed by nine to twelve nights (25%), 13 to 16 nights (19%) and zero to four nights (16%). Only three percent (3%) of respondents spent more than 17 nights in the area. The average number of nights spent in the area is nine nights.

Nights spent	Percentage
0-4 nights	16%
5-8 nights	37%
9-12 nights	25%
13-16 nights	19%
17+ nights	3%

Section C: Conference Behaviour

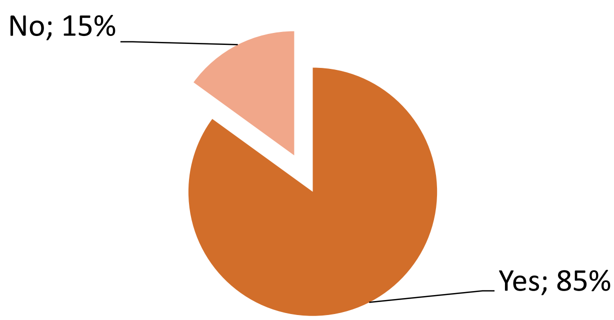
4.2.7 Type of accommodation used

The majority of respondents (46%) stayed in hotels, followed by respondents who stayed at Registered Guesthouses or B&Bs (14%), who were local residents (12%) or used a different/ other type of accommodation such as hostels (12%).

Type of Accommodation	Percentage
Local resident	12%
Family or Friends	7%
Registered Guesthouse or B&B	14%
Hotel	46%
Camping	1%
Rent a house	7%
Day visitor	1%
Other	12%

4.2.8 Main reason for visiting Cape Town

Eighty-five percent (85%) of the respondents indicated that the conference was their main reason for visiting Cape Town.



4.2.9 Previous festival attendance

Nearly all of the respondents (83%) indicated that it was their first time visiting the festival, whereas nine percent (9%) said it was their second visit, two percent (2%) their third visit. Six percent (6%) of the respondents indicated that they had visited the festival more than four times.

Attendance	Percentage
1 time	83%
2 times	9%
3 times	2%
4+ times	6%

4.2.10 Average spending

The highest spending categories included transport to the festival (R4 472.97), accommodation (R3 702.83), conference fees (R1 670.83) and restaurants (R1 016.00). The average amount respondents paid per group visiting the 19th ASSITEJ World Congress and Performing Arts Festival was R12 888.87.

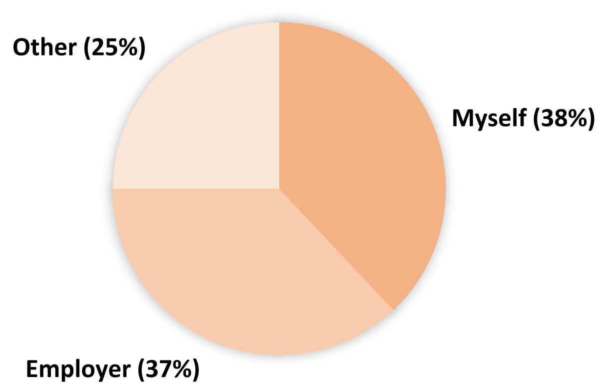
Aspects	Average amount spent
Accommodation	R3,702.83
Food	R772.17
Restaurants	R1,013.00
Transport to the festival	R4,472.97
Transport during the festival	R595.15
Conference fees	R1,670.83
Shopping	R406.25
Parking	R17.17
Other expenses not listed above	R235.50
Total average spending	R 12,888.87

R12,888

The average amount respondents had spent per group

4.2.11 Cost analysis

Thirty-eight percent (38%) of the respondents carried their own conference costs. whereas 37% of the respondents' employers paid theirs. Twenty-five percent (25%) of the respondents paid for their conference by means of other methods, including Arts Development Grants, University bursaries and sponsorships.



4.2.12 Media influence on attendance

In this particular question, respondents were asked to rate to what extent different media platforms influenced their decision to attend the conference. A Likert scale was used (where ‘1’ = not at all and ‘4’ = completely) and the following media platforms scored the highest averages out of four:

- Word-of-mouth (3.4);
- Festival Website (2.4); and
- Festival Emails (2.4).

Media Platform	Mean Value (Std. Deviation)	Frequency
TV	1.1(±0.270)	Not at all
Radio	1.1(±0.509)	Not at all
Festival Website	2.4(±1.130)	To a lesser extent
Festival Emails	2.4(±1.206)	To a lesser extent
Magazines	1.2(±0.431)	Not at all
Newspapers	1.2(±0.500)	Not at all
Social media	1.9(±1.109)	To a lesser extent
Word-of-mouth	3.4(±0.953)	To a greater extent

4.2.13 Main reason for conference attendance

In this particular question, respondents were asked to indicate the main reason for attending the conference. A Likert scale was used (where ‘1’ = not at all important and ‘5’ = extremely important) and the following reasons scored the highest averages out of five:

- Part of a global event and community (4.4);
- To learn new skills and/ or knowledge (4.0);
- Keep up with this ever-changing field (4.0).

Reason	Mean Value (Std. Deviation)	Frequency
It is a professional networking opportunity	4.1(±0.935)	Very important
Part of a global event and community	4.4(±0.870)	Very important
To gain recognition from peers	2.8(±1.333)	Important
Personal interaction with colleagues/ friends	3.8(±1.053)	Very important
Seek career opportunities	3.0(±1.357)	Important
Seeing people I know in my field	3.8(±1.088)	Very important

Opportunity to visit Cape Town	3.8(±1.392)	Very important
Accessibility of the conference destinations	2.4(±1.363)	Less important
It is the closest of its kind	2.4(±1.378)	Less important
To learn new skills and/ or knowledge	4.0(±0.951)	Very important
Keep up with this ever-changing field	4.0(±0.982)	Very important
Interesting topic for the conference	3.8(±0.953)	Very important
Listening to respected speakers	3.7(±1.035)	Very important

4.2.14 Evaluation of conference sessions

Respondents were asked to indicate which conference sessions they attended and then to evaluate those particular sessions. A Likert scale was used (where '1' = Very poor and '4' = Very good). The results were as follows: the three sessions with the highest attendance indication were the ITYARN programme (62%), the Theatre as Education (59%), Theatre for social change (57%) as well as the Theatre for young audiences (55%). The Likert scale indicated that respondents thought the Producers and Bazaars (3.8), Theatre for healing (3.6) and the Theatre and storytelling (3.6) were very good.

	Attendance percentage	Mean Value (Std. Deviation)	Frequency
ITYARN programme	62%	3.3(±0.471)	Good
Theatre as Education	59%	3.2(±0.725)	Good
Theatre by children for children	33%	3.3(±0.471)	Good
Theatre for young audiences	55%	3.1(±0.848)	Good
Write local – play global	19%	3.2(±0.400)	Good
Theatre for social change	57%	3.4(±0.821)	Good
Inclusive international arts	31%	3.0(±0.926)	Good
Puppetry	14%	3.3(±0.745)	Good
Intercultural exchange events	41%	3.2(±0.629)	Good
Theatre and storytelling	42%	3.6(±0.600)	Very good
Theatre for healing	36%	3.6(±0.495)	Very good
Theatre for young audiences	49%	3.4(±.0800)	Good
Theatre for early years	36%	3.2(±0.916)	Good
Producers and Bazaars	17%	3.8(±0.373)	Very good

4.2.15 Conference satisfaction

Respondents were asked to indicate their level of satisfaction with the conference. A Likert scale was used (where '1' = strongly disagree and '5' = strongly agree) and the following reasons scored the highest averages out of five:

- I believe that I did the right thing by attending the conference (4.4);

- I will recommend others to attend this type of conference (4.3);
- I am always interested in news concerning the conference (4.2);
- I am proud to have others know I attend this conference (4.1); and
- Overall I am satisfied with the conference (4.1).

Satisfaction aspect	Mean Value (Std. Deviation)	Frequency
Overall I am satisfied with the conference	4.1(±0.674)	Agree
I believe that I did the right thing by attending the conference	4.4(±0.784)	Agree
This is the only conference of its kind that I attend	3.1(±1.280)	Neutral
The conference sessions are of high quality	3.8(±0.866)	Agree
The conference fulfils my needs	3.6(±0.967)	Agree
The conference programme is excellent	3.9(±0.859)	Agree
As a whole I am happy with the conference	4.0(±0.795)	Agree
I enjoy talking about the conference	4.0(±0.913)	Agree
The conference is well organised	3.6(±1.122)	Agree
I am proud to have others know I attend this conference	4.1(±0.892)	Agree
I like to talk about the conference on social media	3.7(±1.065)	Agree
I will recommend others to attend this type of conference	4.3(±0.642)	Agree
Information of the conference is readily available	3.8(±0.934)	Agree
The facilities are adequate to host this type of conference	4.0(±0.900)	Agree
I am always interested in news concerning the conference	4.2(±0.624)	Agree

4.2.16 Conference value

Respondents were asked to indicate the value of the conference. A Likert scale was used (where '1' = strongly disagree and '5' = strongly agree). The scale indicated that respondents thought that it was worth spending their time at the conference (4.4) and that they were glad they had attended it (4.4). Overall they agreed that the conference was valuable.

Value aspect	Mean Value (Std. Deviation)	Frequency
It is worth spending my time here at the conference	4.4(±0.718)	Agree
It is worth spending my money at the conference	4.3(±0.783)	Agree
I am glad that I attend the conference	4.4(±0.710)	Agree
I received various new ideas/ insights at the conference	4.3(±0.813)	Agree
This was a great learning experience	4.3(±0.787)	Agree
It is fun attending the conference	4.2(±0.857)	Agree
The conference offers a variety of excellent presentations	4.3(±0.798)	Agree

4.2.17 Conference highlights

The most prominent conference highlights of the 19th ASSITEJ World Congress and Performing Arts Festival included the following aspects:

- Connecting with old colleagues,
- Meeting national/ international people,
- Meeting South African artists,
- The Opening Ceremony, and
- The performances.

4.3 Qualitative Research Results: Interviews

4.3.1 Demographic information

An equal distribution between male and female interviewees is evident. Eight interviewees were born in 1999 (18 years old) and 2000 (17 years old) respectively, five in 2001 (16 years old), eighteen in 2002 (15 years old), two in 2005 (12 years old) and one in 2007 (10 years old). These respondents speak mainly English (n=25), eleven speak Xhosa, six Afrikaans and one Zulu. Two respondents were from England, one from KwaZulu-Natal and the remainder from Western Cape province.

4.3.2 Participation in art/ dance/ drama classes

All the respondents partake in drama, design, visual arts or arts classes. Drama and Dance as school subjects as well as Arts and Culture are very popular among respondents. However, there are a number of participants that also take music and drama classes as extra-curricular activities. Their excitement for this industry was clearly visible.

Some of the respondents were involved in productions taking place at the Cultural Festival but most of the interviewees partook in school productions. The challenge with school productions, however, is that this opportunity is not offered annually at all schools which is clearly a disappointment for these respondents. A few respondents also participate as backstage crew. A few of the interviewees do not partake in any productions.

4.3.3 Introduction to the world of theatre

Most of the respondents were introduced to theatre by their school/drama teachers, followed by their parents (mostly their mom). In some cases, interest in theatre started with children productions, theatre performances, such as Beauty and the Beast, Noddy etcetera. Most of the respondents attended productions before, but there were eight respondents that attended a production at this festival for the first time. Clearly the favourite genre is Musicals, followed by Drama and Theatre.

Some of the favourite productions/shows indicated by respondents were: The 12th night; The curious incident of the dog in the night time; Animal Farm, Shakespeare plays, Midsummers dream; The sound of music, Phantom of the Opera, Pricilla queen of the desert, Mamma Mia, Grease, Footloose, Oliver Twist and Lion King. Most of the respondents indicated that ‘it was really done well’ as motivation for their choices above.

Respondents' least favourite productions/shows included: The Tempest (confusing and dark); certain ballets (too long and classical); Fiela se kind (did not understand the story); Warhorse (did not understand); Oliver Twist (poor sound). Most of the respondents however indicated that they did not really have a least favourite production and enjoyed all. Respondents favour performing arts with only two artists preferring visual arts.

Respondents were asked to indicate their reasons for attending theatre productions and the information below is a replica of how it was communicate by the respondents in their own words:

'It is entertaining and at the same time you can view it to understand the performance and the deeper meaning of it.'

'Because there is always a community aspect that you get out of joining a production and getting to know more people that you would not usually talk to. And also show off some skill.'

'Every time I watch a production I feel like I've gained more experience, and it is just my passion.'

'It is for fun and education, but mostly hungry for learning and taking notes of the slightest detail when the actors are not being spoken to. Using silence out of all…and stuff to help me for the future'

'Most of it is for fun, but this one (Animal Farm) is more for educational reasons.'

'Cultural experience as well as for the fun of it.'
'I do it because I want to be it one day.'
'Because I feel it.'
'It is fun and there is always something to learn and to apply to your own acting.'
'To learn new things and to expose myself to all kinds of the arts and to immerse myself in the culture.'
'To learn more about acting and how you as an actor can improve.'
'To experience something new and to get creative.'
'I like watching to get ideas and to experience it. Helps a lot if we are doing a play to come and see how they act, and get inspired.'
'I like it, we get to see something new.'
'I want to learn more.'
'To learn more and see different styles'
'We are writing about this play in the June exams so my teacher brought us today to come and study (we watched Animal Farm today).'
'To interact with the drama experts and to learn more about this wonderful subject.'
'To explore horizons.'
'To be exposed to different genres and different ways of thinking.'
'The school arranged the excursion so as a drama student we had to come'.

‘We find that it teaches us more about the arts and the different aspects of the arts and it is better to see something than to sit in a boring classroom.’

4.3.4 Experience with the arts festival

Respondents enjoyed the festival and indicated that it is mostly an educational experience for them. They also indicated that the workshops were great and that they learnt a lot from these. Some respondents indicated that they would have enjoyed higher levels on interaction more. However, after attending this festival they feel inspired and they learnt a lot.

However, some respondents did not know that they were attending a festival; they thought they were only attending one production. Some interviewees did not know what to expect from the festival but they enjoyed it and their expectations were met. In terms of cost it was clear that the school paid for the participants.

4.4 Economic Impact results

4.4.1 Method Used

Four aspects significantly influence the magnitude of the impact that visitors have on the economy, namely:

- The number of visitors;
- Their length of stay;
- The magnitude of their spending; and
- The multiplier effect of their spending.

In general, the more visitors and the longer they stay, the greater the magnitude of total spending. Higher multiplier effects also lead to greater economic impacts.

In addition to visitors, event organisers also spend money in an economy, causing an additional influx of money. It is this influx of money, both from organisers and visitors, which creates the economic impact. Once the money is spent in an economy, it ripples through the economy as businesses buy stock from other businesses and as they pay their employees. These businesses and employees then spend this money in the economy, creating even more spending, and so it continues. This is referred to as the indirect and induced effects created by the initial spending, or as the multiplier effect.

The direct spending effect is determined by assessing the magnitude of visitor spending as well as organiser spending in hosting the event. To determine the indirect and induced effects of visitor spending, various methods can be employed. Some of the most popular methods include the use of input-output models, social accounting matrices and computable general equilibrium (CGE) models. This research utilises the Western Cape Social Accounting Matrix (SAM) in determining the indirect and induced impact of visitor and organiser spending. The SAM shows the increase in production and employment of each sector in the economy as a result of the increase in spending.

4.4.2 Total Direct Spending

To determine the total direct spending in the economy due to an event such as the Cradle of Creativity, this research relies on two surveys – one among visitors to the Cradle of Creativity Festival and another among the conference attendees. The visitor spending therefore is divided into conference visitors and Festival visitors, with the sum of these two categories of visitors representing total visitor spending. The average spending of each visitor group in these categories are summarised in sections 4.1 and 4.2 of this report.

To obtain **total visitor spending**, the number of visitors to each of the two categories were obtained from the organisers – 365 conference visitors and just more than 21 000 Cradle of Creativity Festival visitors. This is indicated in the Table below.

Total visitor spending according to entry method

SPENDING ITEM	TOTAL	FESTIVAL	CONFERENCE
ACCOMMODATION	R15,318,665	R14,606,038	R712,627
FOOD	R2,184,447	R2,035,840	R148,607
RESTAURANTS	R4,025,726	R3,830,193	R195,534
TRANSPORT	R19,255,032	R18,394,189	R860,843
TRANSPORT DURING	R1,432,710	R1,318,170	R114,539
PRODUCTIONS/REGISTRATION	R851,779	R530,219	R321,559
SHOPPING	R969,752	R891,567	R78,185
PARKING	R68,418	R65,114	R3,304
OTHER	R171,128	R125,805	R45,323
TOTAL	**R44,277,657**	**R41,797,136**	**R2,480,521**

It is evident that although the average spending by Festival goers is much lower than that of conference attendees (i.e. approximately R2 000 versus approximately R6 900 per person) the festival visitors are by far the greatest contributors to total spending at the Festival. In total, more than R44 million is spent by visitors attending the Cradle of Creativity Festival and conference.

A breakdown of organiser spending was furthermore obtained from the organisers. Additional to visitor spending, organisers spent R14.4 million in preparing for the Festival. However, some direct spending by organisers does not take place in the Western Cape, and spending that accrues to businesses in the Western Cape amounts to R12 million.

Since organiser spending is partially funded by conference fees, registration and ticket sales, the income from production and conference registration cannot be counted twice and is therefore subtracted from visitor spending. Transport to the festival also does not fully accrue to local businesses and to account for international airfare, only 50% of all transport to the festival is included as spending that accrues to the province. After accounting for these items, total direct spending (visitor plus organiser spending) amounted to R45.863 million for the 2017 Cradle of Creativity Festival.

4.4.3 Economic Impact

This part of the report will focus on the direct, indirect and induced impact of spending by visitors to the Cradle of Creativity Festival, attendees of the Conference and organisers in preparing for the Festival in the Western Cape Province.

4.4.3.1 Estimated economic impact of spending in the Western Cape

Visitors to and organisers of an event are making an impact on the local and provincial economy due to their spending, more so than does the average tourist/visitor. As mentioned earlier, the total direct spending (visitor plus organiser spending) at the 2017 Cradle of Creativity Festival amounts to R45.863 million. However, the economic impact in the region goes beyond the direct spending of these visitors and organisers due to the indirect effects that it generates in employment and income. Moreover, this increase in spending will trigger increments both in the production of goods and in the delivery of services.

The estimation of the direct, indirect and induced impact of visitors and organisers of the event was made using the classical SAM multiplier approach (derived from the Western Cape SAM), as discussed above. The SAM and expenditure data were therefore ***adjusted*** to quantify the effects of the external variations of the demand produced by visitors and organisers of the event.

The next section will provide a brief description of the direct, indirect and induced impact of spending by visitors and organisers, using the relevant multipliers.

4.4.3.2 Direct, indirect and induced impact of visitors and organisers

This section will provide a brief description of the direct, indirect and induced impact of visitors and organisers at the Cradle of Creativity Festival and conference on production, income and labour, making use of the relevant multipliers.

4.4.3.3 Production

The quantification of the direct, indirect and induced impact of expenditure by visitors and organisers at the Cradle of Creativity Festival and Conference in the Western Cape in 2017 is summarised in the table below. As this expenditure is in part applied by visitors from outside in the purchase of goods and services in the region, this represents an inflow of money into the region, mobilising economic activity, generating employment and generating additional revenues for the province. ‘Production’ is an indication of the total turnover generated by each sector in the regional economy. As such, production comprises two components: demand for intermediate inputs (resources) by activity (domestically produced and imported goods and services), and total value added generated by activity. The table reflects the effects on production (using the production multipliers) of expenditure resulting from the event.

Impact through production multipliers (Rand million, 2006 prices)

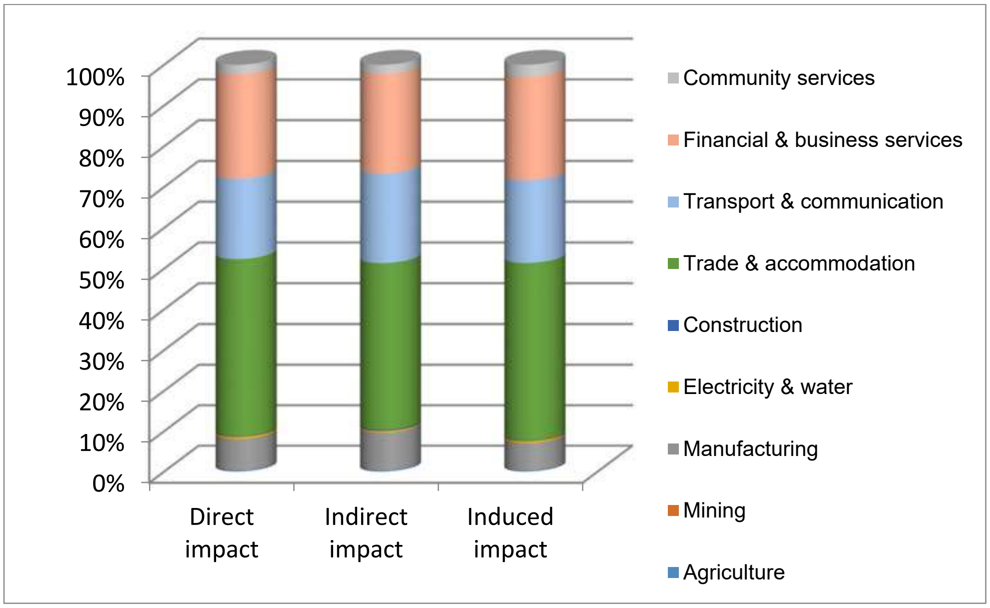
Sector	Direct impact	Indirect impact	Induced impact	Total impact	Percentage (total)
Agriculture	0.126	0.098	0.051	0.274	0.30%
Mining	0.016	0.006	0.006	0.028	0.03%
Manufacturing	3.241	2.892	1.268	7.401	8.06%
Electricity and water	0.228	0.121	0.089	0.439	0.48%
Construction	0.079	0.095	0.031	0.206	0.22%
Trade & accommodation	18.291	12.708	8.220	39.219	42.71%
Transport & communication	8.282	6.803	3.817	18.902	20.58%
Financial & business services	10.790	7.584	4.779	23.153	25.21%
Community services	0.954	0.697	0.553	2.204	2.40%
Total	**42.007**	**31.004**	**18.815**	**91.826**	**100.00%**

Source of data: authors' calculations based on multiplier analysis

The spending of festival participants was predominantly expenditure on trade and accommodation, on financial and business services, as well as transport and communication. The entry/registration fees and sponsorships were used in hosting the event, and a large portion of this was spent on business services, trade, communication and transport. From the table above, it therefore is evident that the largest direct impact is on trade and accommodation (43.5%), financial and business services (25.7%) and transport and communication services (19.7%).

Through the 'backwards linkages', large indirect and induced impacts are experienced in the financial and business services sector, reflecting an indirect impact of R7.58 million and an induced impact of R4.78 million. The manufacturing sector also benefits substantially through linkages with other industries. If the authors ignore the direct effect in the manufacturing sector, 56% of the total increase in production is a result of 'backward linkages', with direct expenditure representing 44%.

All the sourcing of goods and services from non-regional suppliers was included in the analysis and may therefore have exerted a significant direct or indirect effect on the regional economy. By including this indirect impact, although small in significance, the authors are presenting a more comprehensive estimate of the impact of the Festival on the region. The value of the purchases of goods and services made to regional suppliers was then classified using the sector aggregation of the South African Reserve Bank and Statistics South Africa, and its distribution by activity sector is presented in the Figure below.



Visitor and organiser expenditure in the region by activity sector
(Source of data: authors' calculations based on multiplier analysis)

Regarding the analysis of the expenditure by visitors and organisers in 2017, we can conclude that the direct effect represents 46%, the indirect effect 34% and the induced effect 20% of the total increase in production. The second conclusion is that the activity sectors that benefited most, in total, from the increased expenditure were trade and accommodation, financial and business services, transport and communication services, and to a lesser extent, manufacturing.

An analysis of the results indicates that the direct economic impact of visitors and organisers on production and sales in the region (approximately R42 million) can result in an additional R50 million indirect and induced impact, resulting in a total annual impact on the region of approximately R92 million. That is equivalent to an aggregated production multiplier in the order of 2.19. Therefore, for each rand (or 100 cents) spent by visitors in the region, an additional 119 cents are generated regarding indirect and induced expenditure. The aggregated production multiplier is obtained by dividing the total impact by the direct impact.

4.4.3.4 Labour income

The impact of the Cradle of Creativity on labour income in the Western Cape Province is displayed below, reflecting the effects on labour (using the labour multipliers) by the expenditure of visitors and organisers resulting from the event. Given the estimation of the economic impact presented above, it should be borne in mind that, by definition, the calculation of the economic impact should only include the expenditure that would not have occurred in the absence of the event.

Using the same SAM for the Western Cape region, it is also possible to estimate the impact of spending at the Cradle of Creativity Festival at the level of families' income. To do so, specific household income multipliers for each activity sector were calculated and these were then multiplied by the values of the total sector's impacts (see the table below). It is evident from the table that low-income households also benefit from the event (R1.7 million), although to a lesser extent than do middle- and high-income households (R37 million).

Spending impact on the income of families (Rand million, 2006 prices)

SECTOR	INDIRECT AND INDUCED IMPACTS				
	TOTAL IMPACT	LOW INCOME	OTHER INCOME	TOTAL INCOME	PERCENTAGE
Agriculture	0.274	0.007	0.093	0.100	0.26%
Mining	0.028	0.000	0.010	0.011	0.03%
Manufacturing	7.401	0.151	2.512	2.663	6.85%
Electricity and water	0.439	0.008	0.151	0.159	0.41%
Construction	0.206	0.004	0.069	0.074	0.19%
Trade & accommodation	39.219	0.770	15.723	16.493	42.46%
Transport & communication	18.902	0.315	7.913	8.228	21.18%
Financial & business services	23.153	0.341	9.578	9.919	25.54%
Community services	2.204	0.073	1.124	1.198	3.08%
Total	**91.826**	**1.672**	**37.173**	**38.844**	**100.00%**

Source of data: authors' calculations based on multiplier analysis

The aggregated income multiplier, valued at 0.93, can be interpreted as the increment of the Western Cape families' income for each rand of expenditure incurred by visitors and organisers in the region. The authors estimate that currently, approximately R38.8 million remunerations in the Western Cape would not have taken place had the event not taken place in the region. These estimates exclude the spending on salaries by the organisers.

4.4.3.5 Employment

Labour, as an important factor in the production process, is also positively affected. This indicator measures job creation and the contribution of each sector to create new employment opportunities. Salaries and wages are distributed among various types of labourers; thus resulting in a positive impact on the economy.

With the listed values available, it becomes possible to estimate the impact of spending at the Cradle of Creativity Festival on employment levels in the Western Cape Province (as indicated in the table below). The impact of the spending at the Cradle of Creativity Festival on the province's job levels was calculated by using figures from the Western Cape SAM and the 2006 labour force statistics per province data as categorised per business volume and jobs per activity sector in South Africa.

In addition to the number of employees directly involved in the event, the results show that 327 jobs may be exclusively dependent on the Festival. This implies that the Festival supported 327 employment positions as well as the positions occupied by employees who are directly involved with the Festival. These employment opportunities include direct, indirect and induced impacts and reflect both full-time and part-time jobs. Sectors that are affected most are those of trade and accommodation, financial and business services, manufacturing, transport and communication, and community services.

Impact of festival spending at the level of employment

SECTORS	TOTAL IMPACT (R MILLION)	LABOUR MULTIPLIERS	EQUIVALENT JOBS (NUMBER)
Agriculture	0.274	20.93	6
Mining	0.028	2.75	0
Manufacturing	7.401	3.06	23
Electricity and water	0.439	2.45	1
Construction	0.206	5.63	1
Trade & accommodation	39.219	5.57	219
Transport & communication	18.902	1.08	20
Financial & business services	23.153	1.96	45
Community services	2.204	5.18	11
Total	91.826		≈327

[a] *The labour multiplier indicates the number of job opportunities that will be created due to change in production of 1 million by a particular activity.*
Source of data: authors' own calculations based on multiplier analysis

It is important to bear in mind that the input-output tables can only be used to this effect when the job coefficients are known. This requires the existence of estimates for the relationship job-production. Therefore, and based on the values presented previously, an alternative method can be applied to present an estimate of the Festival's impact at the level of jobs in the region.

This can be done by converting the event's expenditure in the region to equivalent job units. Although the input-output analysis can be used for this purpose, Wilson and Raymond (1973:140) proposed an equation that allows the calculation of credible estimates for these values and which is given by:

$$Equivalent\ Jobs = \sum \frac{S_i}{R_i}$$

Where S_i represents the amount of expenditure in the activity sector, i and R_i represent the average business volume per worker of the sector i. Based on this equation, and using data from Statistics South Africa relative to the business volume and the jobs by activity sector in the Western Cape Province in 2006, it was possible to obtain an estimate of the impact of the Festival with regard to the regional job level (refer to the table below).

Impact of festival spending at the level of employment

SECTORS	TOTAL IMPACT (R MILLION)	TRANSACTION VOLUME / VOLUME OF JOB	EQUIVALENT JOBS (NUMBER)
Agriculture	0.274	0.019	14
Mining	0.028	7.905	0
Manufacturing	7.401	2.512	3
Electricity and water	0.439	0.009	49
Construction	0.206	0.061	3
Trade & accommodation	39.219	0.076	516
Transport & communication	18.902	0.416	45
Financial & business services	23.153	0.126	184
Community services	2.204	0.063	35
Total	91.826		≈850

Source of data: authors' calculations based on multiplier analysis

The table above indicates the number of employment opportunities generated within the regional economy due to the Festival having been presented. In addition to the number of employees directly employed by the festival organisers, approximately 850 job opportunities may have resulted from the festival. Hence the absence of the festival would imply a reduction in the number of jobs created in the Western Cape Province. The sectors that would be affected most are those of trade and accommodation, financial and business services, electricity and water, transport and communication, and community services.

5. Conclusions and recommendations
5.1 A summary of the visitor market

The table below contains a summary of the 19th ASSITEJ World Congress and Performing Arts Festival.

Aspects	2017 Profile
Demographic Information	
Gender	Female (66%),
Age	Average age of 40 years.
Home language	English (50%), Afrikaans (9%), Xhosa (8%), Danish or German (4%), other languages (25%) such as French, Japanese, Korean, Spanish, Portuguese and Persian.
Occupation	• Professional (35%), • Students (17%), • Self-employed (12%).
Province of residence	• Western Cape (63%), • Outside RSA borders (32%)
Town/ City of residence	Cape Town (40%), other (48%)
Visitor Behaviour	
Number of respondents in travelling group	Average travelling group comprises 5.47 people
Average days spent at festival	Average days spent is 4.98 days
Average nights spent at festival	Average nights spent 4.55 nights
Festival Behaviour	
Number of tickets bought	Average tickets bought is 4.35 tickets
Number of free tickets received	Average free tickets received is 1.57 tickets
Type of accommodation used	Local residents (42%), Hotels (28%)
Main reason for visiting the festival	Artists (40%), Other (23%), parents (15%)
Theatre performance attendance	Once a month (58%), Every six months (25%)
Age exposed to first theatre production	Average age exposed to theatre productions is 10 years
Introduction to performing arts	Parents (43%), School (21%), other (28%)
First-time visit to Cape Town	No (52%)
Average Spending	Average of R4650.03 per group
Festival attendance	• To enjoy the festival experience • Quality of productions and events • The festival provides a unique experience • Variety of productions and events • The festival promotes cultural inclusiveness
Previous festival attendance	First time attending (55%)
Media influence on attendance	• Word-of-mouth • Social Media • Other: brochures, culture connect and sponsors • Festival Website

Regular attendance of other cultural festivals	Respondents also attend the Grahamstown Festival
Satisfaction with the festival	• I believe that I did the right thing by attending the festival • Overall I am satisfied with the festival • I will recommend others to attend this type of festival • This festival is part of my lifestyle and culture • The festival programme is excellent • As a whole I am happy with the festival • I enjoy talking about the festival
Value of the festival	• I am glad that I attend the festival • It is worth spending my time here at the festival • It is fun attending the festival
Evaluate the current performance you are attending	• Watching others perform is captivating • Attending this was very pleasant • The setting was excellent for this production 1. It stimulated my curiosity

Given the location of the festival it attracted a large local but also international market of professional people. These *festinos* travel in average-sized groups and are willing to stay at the festival for some time and buy tickets for shows. Besides attending this festival they are supporters of the arts and attend at least once a month theatre productions. Exposure to this type of activity should happen at an early age as these *festinos* were exposed to theatre productions by the age of 10 years (this also correlates with the data from the interviews with the younger *festinos*). The influence of parents and school teachers is evident. This group of people is satisfied with the festival and noted high levels of enjoyment, quality productions and events and complimented on the variety offered, the quality and the programme.

5.2 A summary of the conference market

The table below contains a summary of the 19th ASSITEJ World Congress and Performing Arts Conference.

Aspects	2017 Profile
Demographic Information	
Gender	Female (68%),
Age	Average age of 40 years.
Home language	English (36%), Other (29%): Hindi, Greek, Norwegian and Tsonga, German (12%)
Occupation	Professional (47%), students (21%) and Education (15%)
Province of residence	• Outside RSA borders (69%); • Western Cape (19%); and • Gauteng (8%).
Town/ City of residence	• Cape Town (12%); • Johannesburg (6%) • Other (51%): Copenhagen, Harare, Melbourne, New York, Sidney, Athens, and Hong Kong.
Conference Experience	
Number of respondents in travelling group	Average travel group consists of 9 people
Number of respondents paying for others	1.9 people (90%)
Average days spent at conference	Average days spent in area is 8 days
Average nights spent at conference	Average nights spent 9 nights
Conference Behaviour	
Type of accommodation used	Hotel (46%)
Main reason visiting Cape Town	Yes (85%)
Previous festival attendance	First time attending (83%)
Average Spending	Average of R12 888.87 per group
Cost analysis	Percentage myself (38%) Percentage employer (37%) Percentage other (25%)
Media influence on attendance	• Word-of-mouth (3.4); • Festival Website (2.4); • Festival Emails (2.4).
Conference attendance	• Part of a global event and community (4.4); • To learn new skills and/ or knowledge (4.0); • Keep up with this ever-changing field (4.0).
Conference sessions attendance	Highest sessions attended: • ITYARN programme (62%), • Theatre as Education (59%), • Theatre for young audiences (55%). Session evaluation: • Producers and Bazaars (3.8);

	• Theatre for healing (3.6); and • Theatre and storytelling (3.6).
Satisfaction with the conference	• I believe that I did the right thing by attending the conference (4.4); • I will recommend others to attend this type of conference (4.3); • I am always interested in news concerning the conference (4.2); • I am proud to have others know I attend this conference (4.1); and • Overall I am satisfied with the conference (4.1).
Value of the conference	• It was worth spending their time at (4.4) • They were glad they attended the conference (4.4)
Conference highlights	• Connecting with old colleagues, • Meeting national/ international people, • Meeting South African artists • The Opening Ceremony, and • The performances.

The conference respondents were mainly female, 40 years of age, in professional occupations and English speaking. The presence of international conference participants is evident which is excellent to tourism to Cape Town. These participants also travel in larger groups and spend a significant number of days in the area – mostly staying in hotels. Word-of-mouth communication had the strongest influence on their attendance of the conference and their main reasons for attending was to be part of a global event and to learn new skills and gain new knowledge. Most of them participated in the ITYARN programme, and they mostly enjoyed Producers and Bazaars followed by Theatre for healing. They also indicated high levels of satisfaction with the conference and will recommend this to other interested parties. Their highlights of the conference were very focused on networking (meeting old colleagues, meeting national and international people).

5.3 A summary of the younger market

The enthusiasm of the younger market was evident from the interviews. They really enjoyed the festival/productions and learnt a lot from watching and participating. Exposure to theatre from a young age is important and participation in some form of art is of cardinal value, be it in school or as an extra-curricular activity. Clearly this market wants to learn more and they are eager to participate in this type of activity.

5.4 A summary of the economic impact

The impact of the Cradle of Creativity Festival and Conference on production is approximately **R92 million.** This represents the value of the Festival to the economy of the Western Cape.

This event contributes to between 327 and 850 jobs (temporary and permanent) – depending on the method of calculation – in the Western Cape, excluding the employees directly employed by the organising committee.

5.5 Recommendations made by the researchers and respondents

5.5.1 The respondents made the following recommendations:

Festival	Conference
The respondents made the following recommendations: • Development of a festival office/ centre • Better booking systems • Transport services to and from different theatres • Appointment place for delegates to meet • Better local advertising • Infrastructure improvements (City Theatre) • Better description of shows • Better signage • Festival should take place later in the evenings • More informed staff • More security • Performing groups should be accompanied by an organiser	The respondents made the following recommendations: • Upgraded/ better map of the venues involved • Clearer/ more information on websites • Better conference organising and communication • Friendlier and more informed staff • More involvement of the community • Schedule more interactive sessions • Systemised email of changes or cancelations • Don't schedule shows the same time as the opening ceremony • Transport services to and from different venues

5.5.2 Recommendations based on the research data:

- The success of this event is evident from the research and the high levels of satisfaction compliment the quality of this event – it is recommended that marketing for this type of event be increased to ensure good national and international exposure and high visitor numbers.
- The marketing strategies and future planning should be focused on the information of the current markets who are clearly interested in this type of festival and also attend other similar festivals.
- Marketing strategies for the current market should be focused on word-of-mouth, social media and websites.
- The high quality of productions and the variety in the programme should be sustained for future festivals as well.
- Repeat visitation is an aspect that needs attention since 55% visited this festival for the first time – the development of a loyalty programme might be considered.

- The focus on children is important as a love for the arts is clearly developed at an early age – this supports the sustainability of this type of event and more (maybe smaller scale) similar events should be organised in the main centres of South Africa. This will contribute to keeping the arts alive.
- Schools should be encouraged to create annual productions which can be performed for a wider audience and create more opportunities for children.
- The conference attracted a number of international delegates; an aspect that directly contributes to the economic value of the festival – it is important in future to ensure a highly visible international marketing campaign to sustain this market. The future communication with this market should also be focused on word-of-mouth communication, website and emails.
- Conference delegates are attracted by networking opportunities; thus organisers should focus on the creation of such sessions and use that as a selling point in marketing material.
- The economic impact of this event is excellent and this should be acknowledged in future sponsorships and planning of the event.