



Johannesburg Live Music Audiences

Motivations for, and barriers to, 18-to-25 year-old audiences attending and consuming live music in Johannesburg venues

A research report submitted by Elizabeth O'Connor to the Wits School of Arts, University of Witwatersrand, Johannesburg, South Africa in partial fulfilment of a Degree of Master's of Arts.

Sunday 11 October 2015

Image: Copyright, Live SA, 2013

Declaration

I declare that this research report is my own unaided work. It is being submitted in partial fulfilment of the Degree of Master's of Arts (coursework and research report) in the University of the Witwatersrand, Johannesburg. It has not been submitted before for any degree or examination in any other university.

BOC

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Abstract

This qualitative research report explores the motivations for, and barriers to, young people attending and consuming live music in small to medium venues in Johannesburg. With the average age of South Africans being just 25 years, young people represent a large, existing and potential new audience for live music venues looking to grow new audiences. Yet there are challenging racial, spatial and economic legacies of apartheid which live music venues need to overcome to reach out to more young people.

Young South Africans are often described as one entity, defined by their 'race', age and education level. This research uncovers new insights into what motivates young South Africans to attend live music from socialising with friends to deeper emotional connections with music and artists. Broader themes such as young people's desire for authenticity, uniqueness and self-identity are explored in the context of live music as well as their preferences for open spaces and freedom of movement during their live music experiences.

This research explores how to segment South African live music audiences based on motivation and consumption patterns, to understand if it could help inform future audience development strategies in South Africa. Live music venues' understanding and practice of audience development has been analysed to better understand how embedded the arts marketing profession is within the sector and what appetite there could be for the introduction of a motivation-based audience segmentation tool.

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

Keywords

Audience development, arts motivation, arts marketing, arts consumption, arts audiences, hedonic consumption, authenticity, live music, live music venues, barriers to arts attendance, Johannesburg, Gauteng, South Africa, young people, Morris Hargreaves and McIntyre, Concerts SA, The Orbit, Niki's Oasis, Afrikan Freedom Station and the Soweto Theatre.

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Chapter 1: Research question, aim and rationale

Jazz historian Gwen Ansell and Professor Helena Barnard (2013) argue that live music plays a critical role in South Africa's wider music landscape (Ansell & Barnard, 2013, p. 3), 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 (Price Waterhouse Coopers, 2014, p. 146). 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 (Price Waterhouse Cooper, 2014, p. 151). 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 (Moshito Music Conference & Exhibition, 2010, p. 13). 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 (Ansell & Barnard, 2013, pp. ii-iii). 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 (Ansell & Barnard, 2013, p. 7). My research focuses on smaller live music venues rather than 'big concerts' or 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 (StanLib, 2010). Johannesburg's demographics follow this trend with 40% of its population under 25 years old (Johannesburg Development Agency, 2012). It is important to highlight at the outset of this report, that definitions of youth in South Africa are diverse with researchers 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 (South African Regional Poverty Network, 2015). I have focused my research on 18-to-25-year-olds as young people who are just starting their adult lives with some disposable income and independence from their families. 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% (South African Press Association, 2014). I also chose this segment of young people to focus on, as I had some familiarity with them having worked at youth agency, Livity Africa, for the past two years who work directly with 18-to-25-year-olds.

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 (Student Village, 2014,

pp. 22-23). 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 (Student Village, 2014, p. 36). 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 argues that it should be a priority going forward (Ansell & Barnard, 2013, pp. iii-8). 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 (Department of Sports, Arts Culture & Recreation, 2008, pp. 18-19). 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, my research uncovers the level of knowledge and practice of audience development by live music venues.

I studied the motivations for, and barriers to, 18-to-25-year-old audiences attending and consuming live music in Johannesburg venues, as I have been trying to identify how to segment South African arts and culture audiences based on motivation and consumption patterns, to understand if this could help inform future audience development strategies in South Africa. My research attempts to answer two key research questions.

1. What are the motivations for, and barriers to, 18-to-25-year-old audiences attending and consuming live music in Johannesburg venues?
2. What is the level of understanding and practice of audience development among Johannesburg live music venues?

Based on these findings, I make recommendations about how live music venues can use audience development strategies to attract more young people to their spaces.

Personal views and interpretation are inevitable in this type of qualitative research, so it is important to acknowledge any bias I brought to the research. I was born, educated and began my professional career in Australia. My professional experience with audience development has been largely developed in the Global North as an arts marketing manager for a live music and arts venue in the United Kingdom. However, I have experience with live music and audience development in South Africa and sub-Saharan Africa which has given me a detailed understanding of the local context. For the past two years, I have worked at a Johannesburg-based youth organisation, Livity Africa, enabling me to develop youth insight as well as bias. On the whole, I feel my diverse personal experience, as well as distance from South Africa's recent history, brought a unique perspective to this research.

Chapter 2: Literature review

This literature review discusses the international scholarship around audience development, arts marketing, motivation, consumer behaviour and barriers. A wide variety of sources were consulted for this literature review such as international texts and journals dedicated to audience development, arts marketing and management as well as the broader field of consumer behaviour. A possible limitation of the review is the lack of scholarship written from a Global South perspective. Therefore, exploring the historical and current understanding of the South African music industry and youth audience was important in framing the local context for this research. Report-based sources commissioned by industry organisations as well as recent academic research from South African universities have been consulted to help understand the local setting.

2.1 The local context

Professor of Social Anthropology David Coplan's (2007, p. 243) 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 (2005, p. 265) *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 (Ansell, 2005, p. 266).

De-segregated live music venues, previously limited to counterculture spaces¹, 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 providing alternatives to the already established jazz venue, Kippie's (Ansell, 2005, pp. 276-77). Coplan argues that venues such as Kippie's 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 (Coplan, 2007, p. 341). Other platforms for live music began to appear alongside venues including some of the large-scale festivals that are still running today such as *Standard Bank Joy of Jazz*, *Grahamstown National Arts Festival* and *Cape Town North Sea Jazz Festival (now the Cape Town International Jazz Festival)* (Ansell, 2005, pp. 278-79). Sustaining 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 Kippie's (Ansell, 2005, p. 277).

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

¹ A [subculture](#) whose values and norms of behaviour differ substantially from those of mainstream society.

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 (Price Waterhouse Coopers, 2014, p. 151). Business and Arts South Africa (BASA) is an organisation which promotes mutually-beneficial business-art relationships and produces a bi-annual arts audience report. The BASA *Artstrack No. 6* found in 2013 that younger audiences attend live music more frequently than older people with people under the age of 25 years attending reasonably to very often. The same survey found 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 (Business and Arts South Africa, 2013, pp. 44-45).

There are 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 (Department of Sports, Arts, Culture & Recreation, 2008, pp. 100-101).

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 (Department of Sports, Arts, Culture & Recreation, 2008, p. 100).

In 2010, the National Arts Council of South Africa published their *Public participation in the arts survey*, a nationwide survey of the public's participation in arts and culture including live music. The survey explored audience appreciation and barriers to attendance, however it hasn't been conducted since (National Arts Council of South Africa, 2010). 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 2 of the 50 interviewees which informed the music sector research were venue owners (Department of Labour, 2012, pp. 16-18).

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 (Price Waterhouse Coopers, 2014). 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 needletime rights (South African Music Rights Organisation, 2013, p. 7).

Business and Arts South Africa's bi-annual survey *Artstrack* provides insight into arts audiences' attitudes and participation levels, however previous reports have neglected to include live music as a category when measuring audience interest in the different art genres (Business and Arts South Africa, 2011, pp. 10-11). The 2013 *Artstrack No. 6 report* had a much greater focus on live music and

some of those findings are referenced throughout this research report (Business and Arts South Africa, 2013).

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 (Ansell & Barnard, 2013, pp. iii-8).

As already noted, 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 (Ansell & Barnard, 2013, pp. ii-iii). Johannesburg, in the Gauteng province, is historically significant for its iconic music venues which were instrumental in the early growth of the post-apartheid South African live music scene. Furthermore, in the late 1990's Johannesburg, and the wider Gauteng became one of the important breeding grounds for *kwaito*, a new style of township dance music popular with the urban black youth. At the same time, Johannesburg-based radio station YFM launched and quickly attracted a large audience of young black South Africans, known as *Y Culture*, who tuned in to listen to urban music genres such as *kwaito*, *hip hop* and *R&B* (Allen, 2004, pp. 83-84). While the influence of *kwaito* and YFM is not on the same scale today, Johannesburg continues to be regarded as an influential hotbed of emerging South African youth culture. In her book *Entanglement: Literary and cultural reflections on post-apartheid*, Wits Institute for Social and Economic Research Director Sarah Nuttall described *Y Culture* as the remaking of the black body and its repositioning by the first post-apartheid generation. She added that this new generation's self-identities are less influenced by institutional or political forces, but rather through individual self-styling via consumption practices. In her eyes, *Y Culture* cites the apartheid past, but focuses on a culture which speaks to the future (Nuttall, 2009, pp. 108-114).

Now that I have provided some historical background to the unique local context and existing research available for South Africa's live music sector, I will explore the body of knowledge related to arts marketing with a specific focus on audience development, consumption and barriers.

2.2 Arts marketing, audience development, consumption and barriers

Leading writers in the field of arts marketing Miranda Boorsma and Francesco Chiaravalloti suggest that marketing in the arts sector has evolved during the past decades from a functional tool in organisations to a business philosophy (Boorsma & Chiaravalloti, 2010, p. 297). Fellow academics Simon Hayes and Debi Roodhouse support Boorsma and Chiaravalloti's observation, proposing 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 seek out new

entrepreneurial models following the global decline of state funding (Hayes & Roodhouse, 2010, p. 40).

Professor in Arts Management at Australia's Deakin University, Ruth Rentschler proposed an evolutionary framework for the 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 (Hayes & Roodhouse, 2010, p. 42).

I emphasise this evolution of the arts marketing profession to demonstrate that it is a relatively new Anglo-American led field, and this research 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. As a relatively new field of study, Rentschler argues that international management and marketing journals play a critical role in the discipline's scholarship (Rentschler & Kirchner, 2012, p. 7). UK arts management academic Ian Fillis supports Rentschler'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 (Fillis, 2011, p. 11). This point is particularly relevant for my research 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. 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 (Fillis, 2011, p. 14). Boorsma and Chiaravalloti argue that as the field of arts marketing and audience development matures, a relational view of art as experience has emerged, positioning arts consumers as central to the artistic mission of arts organisations. They add that this relational view has presented new area of focus for arts marketing practice and academia (Boorsma & Chiaravalloti, 2010, p. 297).

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 grounding in studying behaviour and human motivation. The majority of these studies were based in the Global North and have been dedicated to audience development (Osbourne & Rentschler, 2010, pp. 56-57).

There is no commonly agreed definition of audience development, however leading audience development writer Heather Maitland defines it as a ‘planned process that involves the whole organisation in broadening and deepening an individual’s engagement with the arts’ (Maitland 1997 cited in Suonsyrja, 2007, p. 12). Rogers maintains that audience development is a holistic and integrative activity (Rogers 1998 cited in Suonsyrja, 2007, p. 12), 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 (Maitland, 2009, pp. 21-22). UK audience development consultants Morris, Hargreaves and McIntyre have also written on this theory, developing a model which borrows from broader marketing theory, and categorising organisations on their focus from product, selling, marketing, audience or outcome (Morris, Hargreaves & McIntyre, 2013, p. 11). Later I use Maitland’s grid and supporting descriptors below to map where the case study venues’ foci currently sit (Maitland, 2009, p. 20).

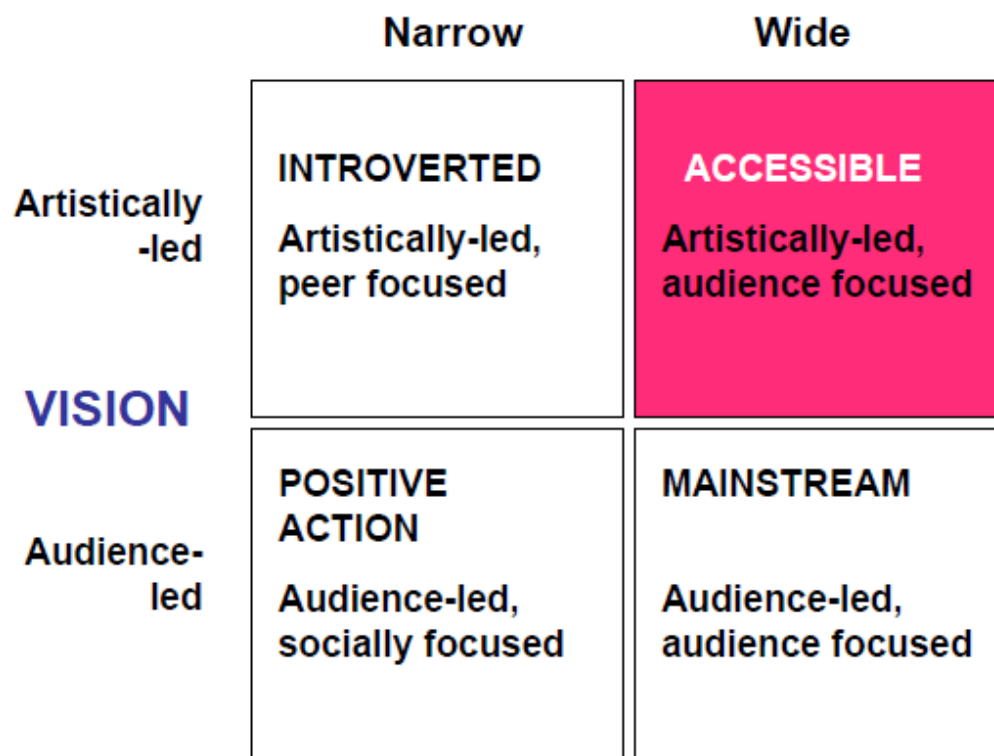
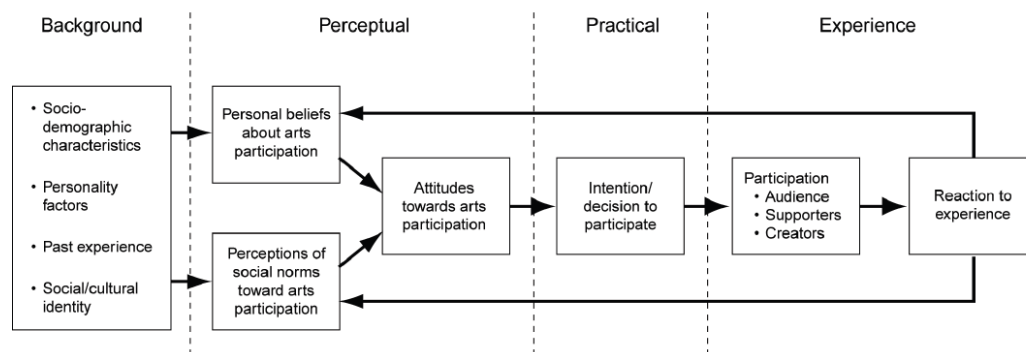


Figure 1: Maitland’s Audience Grid
 (Maitland, 2009, p. 20)

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, i.e., the study and classification of people according to their attitudes, aspirations and other psychological criteria (Oxford Dictionaries, 2014) 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 Wallace Foundation in 2001. The model offers a framework for understanding and influencing 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 (McCarthy & Jinnett, 2001, p. 24).



RAND Behavioral Model diagrams the stages in an individual's decision to participate in the arts.

Figure 2: RAND Behavioural Model
(McCarthy & Jinnett, 2001, p. 24).

A more recent motivation-led audience development model emerged from extensive research in the United Kingdom by 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 (Waltl, 2006, p. 5).



Maslow's Hierarchy of Needs

Figure 3: Maslow's Hierarchy of Needs
(Waltl, 2006, p. 5)

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 (Waltl, 2006, p. 5).

Engagement with art	Maslow's hierarchy of human needs	
Spiritual	Self-actualisation	
Emotional	Aesthetic	
	Cognitive	Esteem
Intellectual		
Social	Social	
	Safety	Physiological

Morris, Hargreaves and McIntyre Audience Development Model

Figure 4: Morris, Hargreaves and McIntyre Audience Development Model

(Morris, Hargreaves and McIntyre, 2013)

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 (Arts Council England, 2011). My research uses the motivation-led *Morris, Hargreaves and McIntyre Audience Development Model* as a reference when analysing the audience motivation findings.



Figure 5: Arts Audiences: Insight 2011 – Urban Eclectic Profile
(Arts Council England, 2011)

Like the ACE model, my research supplements 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 African Audience Research Foundation, 2015). Using this localised research tool helped to ensure that my research findings have 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. My research not only contributes to 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.

Boorsma and Chiaravalloti argue that as the relational view of art as experience has emerged in arts marketing and management theory, arts consumers have become central to arts organisations (Boorsma & Chiaravalloti, 2010, p. 297). UK marketing academic Dr. Chris Hand adds that as arts organisations become more audience-focused, greater knowledge is required to understand the

consumer behavioural loyalty of audience, particularly in terms of choice behaviour across venues and art forms (Hand, 2011. P. 88).

Hedonic consumption was first introduced in consumer behaviour theory by academics Morris Hirschman and Elizabeth 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 (Holbrook & Hirschman 1982 cited in Bradshaw, et al. 2010, p. 5-6). 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,' (Holbrook & Hirschman, 1982, p. 132). 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 (Morris Hargreaves McIntyre, 2013).

Academics Stephen Vargo and Robert 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 (Vargo & Lusch, 2004, p. 1). In arts marketing terms, the audience is no longer merely presented with a product 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 transaction itself (Vargo & Lusch, 2004, p. 1). There is alignment of thought between Vargo and Lusch's service-centred approach with Maitland's (2013) 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, Australian academics Angela Osborne and Ruth Rentschler argue that authenticity is a vital ingredient in relationship development and that '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.' 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 (Osbourne & Rentschler, 2010, pp. 61-67).

In addition to understanding the motivations for 18-to-25-year-old audiences for attending live music venues, my research investigates how audiences consume the arts experience exploring the hedonic consumption theory. This exploration seeks to understand the type of experience live music venues could offer their audiences to ensure authenticity and encourage loyalty.

It is important to note, that this research is informed by the broader field of arts marketing and consumption, which might be interpreted by some as commoditising the arts. I acknowledge 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 (Williams, 1977, p. 13). I am mindful of the importance of arts and culture, as separate from consumption, in South Africa which

is still addressing 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 my study is focused on the relationship between live music and audience.

Finally, my research examines the barriers to 18-to-25-year-olds attending live music venues in Johannesburg (Hayes & Roodhouse, 2010, p. 52). Understanding to what extent physical barriers, such as lack of transport and low disposable income, are impacting attendance levels at live music venues provide vital information that helps venues adapt their audience experience from pricing structure and timing, to their customer service (Independent Research Solutions, 2003, pp. 18-35). However, understanding psychological barriers to attendance is crucial in the South African context which is still affected by spatial and racial legacies of apartheid. The 2013 *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 (Ansell & Barnard, 2013, p. 12).

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.

- *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 hours, pricing that disadvantages people with low income.
- *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.
- *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.
- *Environmental* – these are physical barriers which restrict access such as lack of transport links or lack of security (Morris Hargreaves McIntyre, 2013, pp. 38-39).

This research paper explores the degree to which spatial and racial legacies of apartheid still influence barriers to live music attendance by 18-to-25-year-olds using Dodd and Sandell's categories (Dodd, 2001).

Chapter 3: Methodology

This section outlines my research strategy including research paradigm and theoretical foundation; definition of sample and location; research design; data collection and analysis; and research limitations, bias and ethics. I also outline where my research methodology differed from the ambitions set out in the research proposal and the reasons for this.

Cultural policy author Christopher Madden argues that much of the global arts and cultural audience research has used quantitative measures identifying levels and types of audiences (Madden, 2005, p. 217). However, Rentschler argues that qualitative measures are critically important for policy and practice in audience development. She adds that it is through analysis of qualitative data, in which audiences' perspectives are probed, that key themes regarding what is important to audiences can be truly understood (Osbourne & Rentschler, 2010, p. 55).

I used qualitative research methods for this study as I undertook inquiry which sought depth rather than breadth through the analytical exploration of phenomena (Ambert et al. 1995 cited Mukanga, 2008, p. 14). In terms of phenomena, this research explored in-depth an approach to audience development which champions the use of psychographics to understand motivations for live music attendance. I also explored physical and psychological barriers to attendance, and hedonic consumption (Osbourne & Rentschler, 2010, p. 54) to understand audience consumption of live music at venues. Furthermore, social research academic Sotirios Sarantakos argues that qualitative research is favourable when the standard of knowledge in an area of research, in my case audience development in South Africa, is inadequate and provides no basis for quantitative study. My research could be considered as exploratory which aims to prompt more research in the area in the future (Sarantakos, 2013, p. 147).

I focused my study on four small-to-medium sized live music venues as case studies and the young people researched were chosen as they had frequented them. I also investigated the venue owners and marketing staff's perceptions of young audiences as well as their overall understanding and practice of audience development. This aspect of my research aims to understand the extent to which audience development, and specifically motivation-based audience development, is understood and used by South African arts practitioners. Based on this insight, I will later reflect on its relevance and validity for arts practitioners in a Global South setting like Johannesburg.

In addition to this academic research, I was commissioned to conduct some wider quantitative and qualitative research, profiling a) live music audiences, and b) live music venues' understanding and practice of audience development. The research focused on ten live music venues in Gauteng (including my four chosen case study venues) and involved an online quantitative audience survey as well as face-to-face interviews with the venue owners and marketing staff. I chose to refer to relevant findings from this research where I identified potentially wider trends which warranted further research. The research, titled *Live Music Audiences in Gauteng*, was commissioned in 2014 by Concerts SA and the University of Witwatersrand (O'Connor, 2015).

For this research, I employed a flexible qualitative design based on *grounded theory* which generates rich data from the personal experiences of people. Being grounded in data means the theory is close to everyday behaviour and activity (Sarantakos, 2013, p. 133) and ensures the research is a circular path which allows moving back and forth between data collection and analysis (Calman, 2011). Grounded theorist and senior UK research academic Dr Lynn Calman suggests that researchers who employ a flexible research design based on *grounded theory* require knowledge in the field and, therefore, my professional experience in audience development and youth audiences in the UK, sub-

Saharan Africa and South Africa has been advantageous in adopting this type of research design (Calman, 2011).

Adopting the grounded theory provided me with the flexibility to review and adapt questions throughout the interview process. As a number of significant insights arose in the early interviews, I was able to adapt my interview approach to probe these points further in later interviews. This flexibility also served me well when asking questions around racial legacies of apartheid. By reviewing the reactions in the earlier interviews, I adjusted the question format to gather more rich insight. My interview questions were adapted throughout the interview process, however I still maintained a consistent approach to ensure comparability across all interviews.

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 (Somekh & Lewin, 2012, p. 224). The initial live music venue case study targets were selected by me as having relevance to the project using a technique known as purposive or judgemental sampling (Sarantakos, 2013, p. 178). My case study criteria was 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 (Sarantakos, 2013, p. 146)?

An initial discussion with Concerts SA (the organisation that commissioned the *Songlines* report and financially supports a network of small independent venues) identified Lucky Bean, Afrikan Freedom Station, The Orbit and the Soweto Theatre as potential case studies. All of these venues participated in their previous research and continue to provide regular reports on audience numbers to them. During a follow up meeting they suggested I select Niki's Oasis instead of Lucky Bean as a case study. Based on their view that Lucky Bean's offering and audience were similar to that of The Orbit, a new case study was chosen. I selected the following venues as my final case studies: Niki's Oasis, The Orbit, Soweto Theatre and Afrikan Freedom Station.

The venues are in different locations around Gauteng which enabled me to test attendance barriers based on racial and spatial legacies of apartheid. However, this study could have benefited from a case study venue located in the northern suburbs of Johannesburg. I also initially planned to approach five venues including one of Soweto's major entertainment spaces, Zone 6, however after successfully securing the commitment of all four listed venues above, I moved forward with my

research knowing what was feasible within the timeframe allowed for this research project (Zone 6, 2014).

To source 18-to-25-year-old respondents, I used theoretical sampling which is connected to *grounded theory* (Sarantakos, 2013, p. 146). This type of sampling doesn't prioritise a predetermined number of interviewees but rather continues data collection until no new information is being uncovered and information is well developed and validated (Sarantakos, 2013, p. 180). While I didn't have a structured number of interviews, I ensured the research was feasible by setting a maximum number of interviews and observations. See Appendix C for a detailed description of each of the respondents.

My first strategy for sampling youth audiences 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 I contacted the respondents, only one out of six contacts agreed to be interviewed. Foreseeing this challenge upfront, I undertook a parallel strategy of sourcing respondents from my own network of young people connected with my employer, 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 my case study venues. My respondents were all black South Africans and my study could have benefited from respondents of other 'races'. However, I believe the respondents reflect the dominant racial breakdown of both Johannesburg (City of Johannesburg, 2014, p. 19) and the venues themselves as identified by my interviewees.

My research is a collective case study which includes a number of single studies investigated concurrently for the purpose of researching an issue and/or issues (Bromlet 1986 cited Sarantakos, 2013, p. 223). 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 (Sarantakos, 2013, p. 223). Calman suggests that in-depth interviews, observation and focus groups as the most appropriate data collection methods for studies using grounded theory (Sarantakos, 2013, p. 223).

The research methodology outlined in the proposal included background research, focus groups, in-depth interviews and observation. The final research methodology just focused on background research, in-depth interviews and observation. Reconvening the group of young people for a focus group was not possible within the research timeframe and I felt I had uncovered rich insight from the in-depth interviews. A series of in-depth interviews were conducted with 18-to-25-year-old-audiences of live music sourced in collaboration with the case study venues and my own personal network.

In-depth interviews were also undertaken with key venue staff including the venue owner or general manager and the person responsible for marketing. These interviews were used to gather background on the venue and industry as well as to test understanding and practice of audience development. For three out of four case studies, the venue owner was also responsible for marketing without dedicated marketing resources. However, I was able to interview the general manager, marketing manager and a major promoter at the Soweto Theatre.

Both audiences and staff in-depth interviews used a semi-structured interview technique asking respondents both closed and open-ended 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 (Waltl, 2006, p. 5).

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 I used the SAARF LSM to help define respondents beyond their own definitions of 'race', first language, sex and age (South African Audience Research Foundation, 2015). Unstructured questions aimed to uncover more insight about consumption patterns and barriers to attending live music, complemented by the venue observation.

In my proposal I estimated I would conduct no more than nine interviews with audience members and nine venue staff interviews. Ultimately, I interviewed seven audience members and six venue staff. This final number was influenced by the fact that three out of four venues didn't have dedicated marketing staff.

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. My study used naïve observation in a natural setting where I, the observer, was hidden, observing others focusing on human and active observation (Sarantakos, 2013, p. 235). The types of data I 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. In the research proposal, I noted a feasible study would include observation at no more than six events. I observed five events for this research.

Multiple methods of recording data were utilised for the different collection methods. For example, the online background information of the case study venues was recorded using a coded system based on areas of the business such as marketing, live music history and human resources. I also recorded background information on the live music scene in Johannesburg at the 2014 Moshito Music Conference and Exhibition. Insights were noted during a panel discussion featuring South Africa's venue owners and music promoters including The Orbit, Bassline, Back to the City Festival and Breakout Entertainment (Stuart et al. 2014).

All of my interviews were audio recorded then transcribed, supplemented with written notes. I received some assistance to help transcribe all of my interviews. All interviewees were offered the opportunity for their comments to be anonymous, however all respondents were happy to be referenced by name. Data remains stored on my personal password-protected laptop.

Qualitative research theorists Jane Coffey and Paul Atkinson (1996) suggest that qualitative analysis aims to transform and interpret data presented in text, verbal or visual formats in a rigorous and academic manner. The grounded theory framework, which this study is based on, argues that data analysis should be undertaken during and after data collection to help guide or intensify the

research topic. Coding is one of the most central elements to ground theory and open-coding (coding data as indicators of concepts such as types of motivation) were adopted for this study (Coffey & Atkinson 1996 cited Sarantakos, 2013, p. 372).

To code the interviews, I noted an insight as I read through all of the interviews as well as noting how many times those insights were mentioned. If the insight was mentioned by more than two people I recognised it as significant. I was also looking for insights which linked to my literature review. I analysed the venue and audiences separately first and then looked for linkages across insights. Coding was first written on paper and then completed using an excel document. Finally, I wrote up the initial findings summary which formed the structure of my final report.

It is important to acknowledge some of the limitations to using a qualitative research method including a lack of representativeness and generalizability and comparability (Sarantakos, 2013, p. 46). As a small, focused study my research can't be generalised to all young South Africans, so to combat this, I have referenced trends across the qualitative and quantitative findings to generalise my findings to a larger demographic.

I believe the case studies and associated sample of young audiences I selected provide an in-depth understanding of small, independent live music venues located in Soweto and central Johannesburg. While you could generalise some of the findings to the wider youth population in Johannesburg and South Africa, 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 youth 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. Finally, within Johannesburg itself, respondents singled out venues in the northern suburbs, namely Sandton (Johannesburg major corporate headquarters referred to as the richest square mile in Africa) (Venter, 2008) 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 youth audiences in Johannesburg.

Furthermore, each data collection method brings with it some limitations. For example, while some criticism has been levelled at the case study approach for its lack of generalizability, many case study reports imply that their findings are of relevance because they claim to illuminate more general issues. Stake argues that case studies can appeal to the reader's naturalistic generalization, that is, they recognise aspects of their own experience in the case study and intuitively generalize to their own situation rather than prioritising whether the study is statistically representative (Stake, 1995, pp. 444-466). Another limitation example would be the risk of researcher bias when conducting observation which is subject to selective perception and memory (University of West England, 2014). I do have bias, which I have articulated earlier in the report, however I feel my absence from South Africa's recent history as well as my experience with live music audiences in Australia, the UK and Africa allows me to bring a broader perspective when analysing the findings.

Finally, this research 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.

Chapter 4: Case study venues

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

It is a live music venue with bistro and is based in Braamfontein in close proximity to universities and student accommodation (The Orbit, 2014). 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 (Péguillan, 2014).

Péguillan 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 (Péguillan, 2014).

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 (The Orbit, 2014). Péguillan is adamant that the venue exclusively features jazz with some improvised and soul music performances from time to time (Stuart et al. 2014). 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 (Péguillan, 2014).

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 Orbit observation, 2014).

The dinner offering could be considered expensive compared to many restaurants with a similar menu (The Orbit observation, 2014). However, Péguillan 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 (Péguillan, 2014).

Based on Péguillan's informal knowledge, the primary audience at The Orbit are middle class professionals aged between 35 and 50 years (Péguillan, 2014). From my observation, the venue appeared to attract a diverse audience of 'races' which reflects the racial makeup of Johannesburg (The Orbit observation, 2014).

The venue is open six days a week with the downstairs restaurant offering free Wi-Fi (The Orbit, 2014). The Orbit is a recipient of artist funding as part of the Concerts SA live music initiative.

Afrikan Freedom Station

Westdene, 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 (Afrikan Freedom Station, 2014). 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' (Afrikan Freedom Station, 2014).

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 Mokwena 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 food and drinks at a very affordable price to cater for its audience of mainly young people (Mokwena, 2014). 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 (Afrikan Freedom Station observation, 2015). Mokwena described the venue in an article by Percy Mabandu, 'we are not part of a gated cultural precinct; we are a street-level intervention for young Africans' (Mabandu, 2013).

Mokwena added that while the venue is frequented predominately by young black people, the space is open to all (Mokwena, 2014). I would agree with this statement, for I, as a white Australian with limited connection to the space or his personal narrative, felt instantly welcomed by the people in the venue. I would suggest my personal outlook on life and familiarity with similar spaces in Africa and abroad may have aided my comfort more than other people (Afrikan Freedom Station observation, 2015).

The location of the venue is very significant to the owner. In Mokwena'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 (Mokwena, 2014).

The venue offers free Wi-Fi to audiences, which Mokwena suggested is a huge draw card for young people who frequent the venue during the day to work, create and collaborate with fellow artists (Mokwena, 2014).

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 Kokot, Malcom Jiyane, Siya (from The Brother Moves On) and Uju (Zvomuya, 2013).

The venue generates income through their café as well as ticket sales at their live events, however Mokwena 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 (Mokwena 2014).

Soweto Theatre

Soweto, <http://www.sowetothatre.org.za/>

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 (Johnson, 2014).

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 (Johnson, 2014).

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 (City of Johannesburg, 2012). 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 (Johnson, 2014).

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 (South African History Online,

2015). The Soweto Theatre is located in the Jabulani Precinct in Soweto next to a recently developed shopping complex, Jabulani Mall. Johnson 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. Johnson added that the City of Johannesburg would like to create a community in the precinct where people can live, work and play (Carl, 2014).

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, Robert Motseko, 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 (Motseko, 2014).

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 (Johnson 2014).

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. *'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'* (Twala, 2014).

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 as a person attending the event alone I 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 (Soweto Arts and Craft Fair observation, 2014).

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, 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 'local talent, the power of the arts and also in the dynamic, cosmopolitan group of pro-active young people in Johannesburg' (Jozi Unsigned, 2015). Despite attracting large audiences (some events attracted over 1000 people), the fair is financially challenging to sustain (Twala, 2014).

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 Twala, indicated this was not always financially sustainable. His ideal line up would include a balance of high profile and up-and-coming artists (Twala, 2014).

Niki's Oasis

Newtown, <https://www.facebook.com/pages/Nikis-Oasis-Lounge-Restaurant/416781378360874>

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 (Rwaxa, 2014).

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 (Rwaxa, 2014).

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. Rwaxa estimated that her audience numbers reduced by 60% during construction. With the end of construction nearing, Rwaxa had plans to revamp the venue with a new stage and cosmetic improvements in December 2014. During my observation in February 2015, I noticed she had made some improvements to stage and performance area only (Niki's Oasis observation, 2015).

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 designated a 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 (Rwaxa, 2014).

During my observation I 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. I found myself imagining who might have performed here in the past (Niki's Oasis observation, 2015). 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 (Rwaxa, 2014). I observed this type of audience at the event I attended, however there were 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 (Niki's Oasis observation,

2015). Niki believes their focus of showcasing new young talent could help attract young audiences to the venue (Rwaxa, 2014).

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 (Rwaxa, 2014).

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 also a recipient of artist funding as part of the Concerts SA live music initiative (Rwaxa, 2014).

Taboo (Observation only)

Sandton, <http://www.taboo.co.za/>

Based on insight from the in-depth interviews with young people, I observed one venue located in Sandton, Johannesburg. I was invited as a guest, however the standard ticket price was R200. The venue describes itself as nestled in the grand square mile of Africa and provides its clientele with a heady mix of glamour and luxury (Taboo, 2015).

My experience of the venue is consistent with their description on the website. After checking off our names at the guest list, we entered the venue along a red carpet with an opportunity to take pictures, like a celebrity, just outside the main entrance. The décor could be described as luxurious with white leather couches, chandeliers and black interior walls. I observed a focus on treating their customers as VIP guests, with many of the seats roped off and reserved from early on in the evening before the main audience arrived. The VIP seats also featured ice buckets to encourage the purchase of bottles of champagne and wine as opposed to single drinks. The audience, while diverse in age and 'race', were dressed formally with all of the women wearing high-heels and dresses and the men wearing trousers and smart shoes. While I couldn't see reference to it on the website, I had the impression a strict dress code is applied at this venue (Taboo observation, 2015).

This venue mainly hosts international and local DJs with some live performances from musicians, however I assumed the experience of seeing and listening to music at the venue is secondary to socialising with a certain demographic of people who appear wealthy, glamorous socialites in Johannesburg. The configuration of space was not focused on the performance space, but rather concentrated on a series of VIP areas which may not have a view of the main stage and DJ booth (Taboo observation, 2015).

There are other aspects to the venue which indicates a focus on high net worth individuals including a concierge service, A-Lister club offering as well as expensive door and drinks prices compared to the other case study venues in this research. Finally, the names of the events use words such as 'rich', 'famous', 'major league' and 'high society' in their titles which I felt reinforced their target audience's preferences (Taboo, 2015).

Chapter 5: Research Findings

Below is a summary of the findings of my primary research, which I have linked with the scholarship outlined in my literature review and relevant research. New scholarship has been introduced to provide a richer discussion around new insights uncovered during the primary research.

My findings are presented in three key areas.

- Young audiences - motivations for, and barriers to, 18-to-25-year-old audiences attending and consuming live music in Johannesburg venues.
- 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.

5.1 Young audiences

One of my 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', I felt this contemporary approach, which is championed by the arts marketing sector 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) (StanLib, 2010), 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 (Blaine, 2012).

For this study I have referenced 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 *Hierarchy of Needs* theory (Waltl, 2006, p. 5). According to this model, audiences attend the arts to fulfil a social, intellectual, emotional or spiritual need.

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 also be interpreted in South Africa as 'relating to religion or religious belief' (Oxford Dictionaries.com, 2015). 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' (Roberts et al. 2010, p. 185). '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 (about.com, 2015). Maslow's theory suggests that people only seek to fulfil the peak motivation, 'self-actualisation', after their basic needs or motivations are met (about.com, 2015). 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 my findings, which uncovered that 'self-actualisation' was a strong motivator for young people and their relationship with live music.

I asked the young respondents 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).

My research indicates that young people of the same age and 'race' have different motivations to attend live music. Social interaction at live music is common to all respondents, however it is often the secondary motivation behind an emotional or spiritual/self-actualisation motivation. None of the respondents are motivated intellectually to see live music, however Lethabo suggests that some artists like *The Brother Moves On* 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 (Lethabo, 2014).

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'* (Lesedi, 2014).

For Polly, whose main motivation to attend live music is to have fun with friends, having a close physical connection with the audience is important. She likes 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'* (Polly, 2014).

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 (Nzolo, 2014). Two respondents, Lethabo and Ntombenhle, are emotionally motivated to attend live music. 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' (Lethabo, 2014). 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'* (Ntombenhle, 2014).

Two respondents' main motivation is spiritual or self-actualisation including Nomsa and Modisaotsile. When asked the structured question about her main motivation for attending live music, Nomsa 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'* (Nomsa, 2014). 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'* (Modisaotsile, 2014).

All respondents prefer 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 *2015 Live Music Audiences in Gauteng* report supports my research finding that while social interaction is important, more young people have stronger motivations to attend live music. For example, 33% of the quantitative respondents aged 18 to 20 cited seeing talented musicians as their main motivation with 16% wanting to have fun with their friends. Similarly, 52% of respondents aged 21 to 29 cited seeing talented musicians as their main motivation with 25% wanting to have fun with their friends (O'Connor, 2015). While these two age brackets don't correlate directly with my study, I highlight these findings 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. Dean of Arts and Education at Australia's Deakin University Professor Jennifer Radbourne argues the new 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' (Radbourne et al. 2009, p. 16).

I looked at the motivations of the young people I interviewed 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, I would be curious to test 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 makes me question if engagement in live music for escapism reasons would be a stronger motivating factor for these groups (South African Audience Research Foundation, 2015). 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 (Harris, 2011). An International Federation of Arts Councils and Cultural Agencies (IFACCA) international survey reported a view among their member organisations that people turn to the arts in times of turmoil for the arts' 'feel good' factor. They

believe demand for the arts doesn't decrease as much as in other industries during the economic recessions (Madden, 2009, p. 7).

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 are 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 (Izadi, 2015). Another consideration was whether the men felt comfortable telling me, a female researcher, how they were emotionally or spiritually connected with live music. I found an interesting interpretation of perceived differences among genders' motivations from an article written about the 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 (Barton, 2008). 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.

Six out of seven 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 *2015 Live Music Audiences in Gauteng* report which indicates that seeing talented musicians perform is the strongest motivator for 18-to-20-year-old and 21-to-29-year-old respondents to attend live music events (O'Connor, 2015). Music is an important part of all of the young 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 (Pondering Panda, 2014, p. 6).

The young people I 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"'* (Lethabo, 2014). 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'* (Polly, 2014).

Knowledge of the artist and the type of genre is also important for young 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's performance has to be on point' (Nomsa, 2014). 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'* (Ntombenhle, 2014).

Music genre preference is a motivating factor for many of the respondents when deciding whether to attend a live music event. The most common genres are hip hop, contemporary African, jazz and electronic. The *2015 Live Music Audiences in Gauteng* report also indicated hip hop and RnB/soul as popular among 18-to-20-year-old respondents with jazz popular alongside hip hop and RnB/soul with 21-to-29-year-olds (O'Connor, 2015).

Contemporary African (including Afropop)	4
Hip Hop	3
Jazz	3
Electronic	3
Indie	1
Rock	1
House	1

Figure 6: Primary Research Popular Music Genres

It is important to note that music genre popularity may differ for a survey of young people with a national geographical spread and a more diverse sample base. For example, BASA's national *Artstrack No. 6* report indicated that hip hop, gospel and kwaito were the most popular genres among 19-to-24-year-olds (Business and Arts South Africa, 2013, p. 33). My study didn't locate trends in music genre by gender or *SAARF LSM*, however this could be seen with the *Artstrack No. 6* report which illustrated a difference in genre preference by gender and *SAARF LSM*. The *Artstrack No. 6* 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 (Business and Arts South Africa, 2013).

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 (Radbourn et al. 2009, p. 16). That is, the artist and venue don't create the live music event alone, the audience participates in creating it through the process of co-production via their active engagement and response to the artist and audience (Vargo & Lusch, 2004, p. 1). Furthermore, the audience now determines the quality or value of a live music performance by more than just the music alone – their hedonic response.

Six out of the seven respondents' consumption of live music appears 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 desire 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'* (Nomsa, 2014). Polly, Modisaotsile and Lesedi like 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'* (Modisaotsile, 2014). 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'* (Lesedi, 2014). 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 (Lethabo, 2014). Open spaces like Mary Fitzgerald Square, Zoo Lake and Constitution Hill were mentioned by four respondents as their preferred spaces to hear live music.

I feel 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 (Price Waterhouse Coopers, 2014, p. 146). 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 venues 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'* (Lesedi, 2014).

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 (Nuttall, 2009, p. 114). 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'* (Osborne & Rentschler, 2010, pp. 61-67). 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 (Radbourne et al. 2009, pp. 20-21).

A large part of the respondents' hedonic response was about authenticity. Earlier I noted two comments from Nomsa and Ntombenhle who desired an authentic and quality performance from

the artist in a live music performance. This aspect of authenticity is 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 (Radbourne et al. 2009, p. 20). I will now cite a few examples from the in-depth interviews.

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'* (Ntombenhle, 2014). 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 Stars² and have the time of my life without feeling like I'm underdressed'* (Nomsa, 2014). 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 enjoy'* (Polly, 2014).

Based on these perceptions, I observed one new venue in the northern suburbs of Johannesburg, Sandton, to gather further insight into the respondents' comments. As described earlier, the venue I observed in Sandton was 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 Africans (England, 2014). 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' (Lesedi, 2014). This preference for exclusive and socially-motivated spaces like Taboo 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.

I looked at my interview insights to find any 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 females (Pondering Panda, 2014, p. 16). Once again, this insight could be tested with a larger sample in future audience research.

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. I asked all of the respondents a series of open-ended questions about how open they perceived live music venues were to all 'races'.

² popular trainer brand among young people.

Using the grounded theory approach, I was flexible in how I phrased and adapted these questions based on the comprehension of the question by the first interviewees. As a white person asking this question, I was conscious of how honest the respondents would be, noting that they could be concerned that their comments might offend me. All of the survey participants were aware that I was not from South Africa, allowing for greater objectivity in my interpretation of their comments.

There was a variety of responses from the interviewees and I did need to ask follow up questions to draw out their insights, however I observed that five out of the seven respondents preferred an authentically diverse audience at live music events. By that I mean, 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'* (Polly, 2014). 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 like uncomfortable, because I'm in those spaces quite a lot with work. If there were like three black people at the event, we might joke about it like 'oh, it's so white' (Ntombenhle, 2014).*

While there was an overwhelming sense that young people seek out venues with an authentically diverse audience, this appears 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 young 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'* (Nzolo, 2014). Lesedi added *'I think in Johannesburg I can go anywhere. And then if you say 'there's an 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'* (Lesedi, 2014). 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'* (Ntombenhle, 2014).

So while I 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).

A common thread through all of the interviews is young people's search for uniqueness in the venue, experience and artists. There is a strong rejection of live music and culture they perceive is

experienced in Sandton and Johannesburg's northern suburbs. They regard the location, its venues and audiences are money-led, less creative and not unique.

Ntombenhle and Lethabo both like 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*' (Lethabo, 2014). 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*' (Ntombenhle, 2014).

A strong sense of individual identity or self-identity is evident among all of the young people I interviewed. This can 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 demonstrates 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 (Pondering Panda, 2014, p. 15). These insights support my research 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' (Nuttall, 2009, p. 119).

5.2 Barriers

Barriers to attending live music events were explored in open-ended questions during the in-depth interviews with young people and venue staff. I also compared the responses of 18-to-20 and 21-to-29-year-old respondents of the *2015 Live Music Audiences in Gauteng* report to highlight if there were differences across 'races'.

Price sensitivity and access to disposable income were mentioned by six out of the seven young people I interviewed as a potential barrier to attending live music more often. This barrier was also highlighted by one third of the 18-to-20-year-old respondents of the *2015 Live Music Audiences in Gauteng* report and 37% of 21-to-29-year-olds (O'Connor, 2015). 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. My 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, I turned to the *2015 Live Music Audiences in Gauteng* report. None of the 18-to-20-year-old respondents who identified themselves as white, highlighted price as a barrier to live music attendance, while 33% of respondents from the

same age bracket who identified as black saw price as a barrier (O'Connor, 2015). 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 (Campbell, 2014). Alongside racial economic inequality, 50% percent of 18-to-24-year-olds are still living in poverty (Statistics South Africa, 2014, p. 29). These two issues should 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 I 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 live music event. These findings are supported by the *2015 Live Music Audiences in Gauteng* report which indicates that 18-to-20-year-old respondents would spend from R150 to over R200 for a live music event (O'Connor, 2015). 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'* (Polly, 2014).

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 Péguillan 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 major 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 created institutional barriers to young audiences through their ticket, food and beverage pricing, however when I explored future plans for youth audiences with Péguillan, he appeared open to strategies to attract more young people (Péguillan, 2014). While The Orbit has created an institutional barrier with their pricing strategy, Afrikan Freedom Station actively try 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'* (Mokwena, 2014). 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 I interviewed 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 (Business and Arts South Africa, 2013, p. 44). 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-older 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 (McKinsey and Company, 2012, pp. 2-6). Consumer trends can't be directly applied to live music attendance, however I feel these insights could inform long-term audience development programmes targeting young people.

Accessibility including lack of public transport and personal safety are significant physical barriers to attending live music. Four out of seven of the young interviewees identified lack of public transport as a major barrier. Lack of public transport at night also creates a perceived lack of personal safety by the young people. In addition to limited affordable public transport and frequent incidences 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*' (Modisaotsile, 2014). The Orbit's Péguillan echoed Modisaotsile's view '*travel can be a barrier for people where the public transport is scarce*' (Péguillan, 2014). 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 I explored with this research was the degree to which 'race' was seen as barrier to attendance. For this part of the research I referenced Dodd and Sandell's *perception and awareness barriers*. As well as understanding young people's perceptions, I explored whether the venues felt their spaces were open, attracting, all 'races'. Finally, I noted the audience demographics at individual live music events during my observation to determine whether their ambition of attracting diverse audiences was a reality.

I delved into this topic 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.

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, I observed that the audience breakdown was 90% black (Soweto Arts and Craft Fair observation, 2014). 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, the Fair's Twala believed non-black people may have the perception that they are not welcome or safe in Soweto (Twala, 2014). I highlight this example, 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 is 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'* (Nomsa, 2014). 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'* (Ntombenhle, 2014). 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 (Lesedi, 2014). 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 (Lethabo, 2014). This was also highlighted by 11% of the 18-to-20 and 20% of the 21-to-29-year-old respondents of the *2015 Live Music Audiences in Gauteng* report who identify a lack of consistent programming as a barrier to attending live music (O'Connor, 2015).

The final institutional barrier was a lack of promotion of live music events. Three out of seven of the young people I interviewed believe venues are not sufficiently promoting their live music events. They also feel 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'* (Lethabo, 2014) 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'* (Polly, 2014).

5.3 Venues

As well as exploring young audiences' motivations and consumption of live music, I wanted to understand my case study venues' attitudes towards, and knowledge about, 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.

My research 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 three out of four of the venues did not have a dedicated resource for marketing and audience development. Three 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 my 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' (Ansell & Barnard, 2013, p. 5). 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. The Orbit's Péguillan 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'* (Péguillan, 2014).

While many of the venues don'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. Three out of the four venues would like to have more resources dedicated to marketing and audience development, however their finances currently didn't allow for it. Mokwena 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'* (Mokwena, 2014). While I understand that financial challenges the venues face could reduce their capacity to invest in marketing and audience development, I did observe investment prioritised in other aspects on the venue, namely, artist programming and artist fees. For example, I observed Niki's Oasis has very limited resource dedicated to marketing their live music events with however the venue was adamant about paying the performers a guaranteed fee. *'We want artists to take home at a guaranteed fee for their performance'* (Rwaxa, 2014). 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'* (Péguillan, 2014). I will now explore this artist-led approach adopted by two out of the four venues and the implications for developing audiences.

In my literature review, I discussed Rentschler evolutionary framework to consider 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* (Hays & Roodhouse, 2010, p. 42).

I would argue that the arts marketing profession among my case studies is largely sitting between the *professionalization* and *discovery* period. For example, three out four 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 would definitely 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 that I will explore in the findings analysis chapter - how can the independent live music sector learn from the larger promoters who are dominating the live music sector (in terms of audience numbers and revenue) in South Africa (Price Waterhouse Coopers, 2014, p. 153)?

The concept of artistically-led, audience focused organisations explored in my literature review is a popular and current discussion in global arts marketing literature. I 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 (Maitland, 2009, p. 20). 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 other hand, 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. I mapped the venues on the grid based on Maitland's descriptors and elaborated further on each venue in the below table.

VISION		AUDIENCE	
		NARROW	WIDE
	ARTISTICAL LY-LED	Introverted Artistically-led and peer focused The Orbit Niki's Oasis	Accessible Artistically-led and audience-focused Afrikan Freedom Station Soweto Arts and Craft Fair
	AUDIENCE- LED	Positive Action Audience-led and socially-focused	Mainstream Audience-led and audience-focused Soweto Theatre

Figure 7: Case study venues mapped on Maitland's model

	Knowledge of audience	Conducts formal research	Described a focus on the artist or the audience	Segments the audience	Tailors their marketing to audiences	Has dedicated marketing resources
The Orbit	Informal knowledge	Informal insights	Very strong artistic focus	Informal	Some Basic audience database	No dedicated resources, but a desire increase marketing resources Informal marketing strategy Focus on digital marketing
The Soweto Theatre	Informal	Not yet, but planned	Audience, largely a receiving house for commercial live music events	Limited	Limited Basic audience database	Dedicated team Marketing plan to be implemented Focus on digital marketing
Soweto Arts and Craft Fair	Informal	Informal	Audience and artists	Some	Limited	Small team, but a clear focus on marketing and developing future audiences Focus on digital marketing
Afrikan Freedom Station	Informal	Informal	Audience and artists	Informal	Limited	Small team, but a desire for more focus on marketing and audience development
Niki's Oasis	Informal	Informal	Artists	Informal	Limited	Very limited resource dedicated to marketing and audience development with a reliance on existing networks

Figure 8: Case study venues mapped against Rentschler's evolutionary framework

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 place greater emphasis on audience development in its post-graduate arts and cultural management degree. This being said, my research indicates that venue owners had different interpretations of what audience development is.

The Afrikan Freedom Station's Mokwena 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'* (Kwena, 2014). The Soweto Theatre's Johnson felt audience development was too reliant on models from the Global North which didn't respond to South Africa's context. He believed venues need a customised, hybrid audience development model which draws on best practice, yet is responsive to the South African context. *'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'* (Johnson, 2014).

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'* (Twala, 2014). The Soweto Theatre's Motseko feels audience development is focused on the sustainability of the theatre and that marketing and audience development must work closely together (Motseko, 2014).

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 two of the four venues are more artistically-led could 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 my literature review.

While there is a lack of awareness and practice of audience development, my 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. I found a culture of informal audience research and segmentation based on demographics, behaviour and motivation which I will now explore.

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 use Facebook's free

insights tool to understand their audience demographics and preferences (Mokwena, 2014; Twala, 2014). The Orbit and the Soweto Arts and Craft Fair both have regular face- to-face conversations or focus groups with their artist communities (Péguillan, 2014; Twala, 2014). Niki's Oasis has informal conversations with customers and The Orbit prioritise informal research of their top bookers and spenders' consumption behaviour including music taste, food and beverage preferences and attendance frequency (Rwaxa, 2014; Péguillan, 2014). All venues expressed a desire to do more formal surveying or questionnaires with their existing and potential audiences. I also explored what audience information they 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. I also observed venues' data capturing patterns during my observation. All venues said they had a mailing list, however it was not apparent how to join all venues' mailing lists. Only two out of the four venues have mailing lists on their websites which capture basic information including name, email, phone number and address. At each of my venue observations, I didn't see attempts to capture further information about the audience either as I bought a ticket or via surveying. Finally, at one venue I booked tickets over the phone and while I was asked for my email address, there was no attempt to sign me up for a mailing list.

Three out of the four venues don't offer an online booking opportunity as they believe 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 (Motseko, 2014). Audience databases used by the venues are spreadsheets or basic databases which don't allow for audience segmentation by purchasing behaviour or artistic preference (Motseko, 2014; Péguillan, 2014).

As well as understanding how the venues were researching and capturing information about their audiences, I asked the venues an open-ended question about how they would describe their audience and what type of experience their audience receive at their venue. While I believe it was unintentional to some degree, the venues described their audiences using different types of segmentation approaches including demographic, behavioural and benefit segmentation (Morris Hargreaves McIntyre, 2013, pp. 23-24). All of the venues described their audience based on demographic segmentation including 'race', age, sex and perceived income level. The Orbit appear 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 (Péguillan, 2014). The Morris Hargreaves McIntyre motivation-led audience development model I applied with the young people's interviews is a form of benefit segmentation (Morris Hargreaves McIntyre, 2013, pp. 23-24). Here are examples of behavioural and benefit segmentation of The Orbit's audience as described by Péguillan:

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' (Péguillan, 2014).*

I could also apply the Morris Hargreaves McIntyre motivation-led audience development model to one of the other venues who articulated their audience to me. Twala 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 I interviewed (Twala 2014).

Finally, I observed Niki's Oasis 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. In our interview, Rwaxa 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.'* Rwaxa added that these men have been coming frequently to her venue since it first opened in the post-apartheid 1990's (Rwaxa, 2014).

While the venues hold different levels of value in audience development, there is a common view among all that the sector needed to work collaboratively to build a larger live music audience. All of the venues feel wider collaboration is needed to grow a culture of live music attendance at venues. 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'* (Rwaxa, 2014). 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'* (Péguillan, 2014).

The Soweto Arts and Craft Fair feel encouraging early exposure to live music and the arts is 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'* (Twala, 2014). All of the venues expressed an interest in attracting young audiences, however I observed a perception from two out of the four venues 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. Rwaxa 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'* (Rwaxa, 2014).

At the same time, some of the young people feel the venues are 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 like really love to come to Kitcheners, 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'* (Nomsa, 2014). Lesedi commented on 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'* (Lesedi, 2014). I found 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.

There is a shortage of arts marketing and audience development skills in the live music sector with three out of four of the venues not having dedicated experts managing their marketing and audience development. There is a demand for skills development and the cultivation of specialist professionals by all four venues, however it doesn'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. Twala from the Soweto Arts and Craft Fair would like to receive more marketing budget allocation when receiving artistic grants (Twala, 2014). Two of the venues had worked with an external agency to support their marketing and public relations and saw the potential for this approach in the future.

A common discourse among all four venues is the frustration with artists not proactively marketing performances at their venues. The venues feel this is due in part to a lack of skills, but mainly due to an unwillingness on the part of the artists. The venues believe the artists feel that marketing is the responsibility of the venue.

Péguillan 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' (Aymeric, 2014).

Twala 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'* (Twala, 2014). The venues include promotion expectations in artists' contracts, however this doesn't guarantee cooperation from all artists.

Chapter 6: Reflecting on the findings and future recommendations

The aim of this research was to study the motivations for, and barriers to, 18-to-25-year-old audiences attending and consuming live music in Johannesburg venues, as I 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, I feel my 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. I believe it is just the first step and that 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.

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 I would make is for individual live music venues to take responsibility for formally understanding their own audiences, 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 should also be prioritised at a micro-level by venues, artists and organisations. Regular market and audience research can help with 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 (Morris Hargreaves McIntyre, 2013, p. 45). 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 (South African Audience Research Foundation, 2015). I used one of SAARF's audience profiling tools for this research, *LSM*, to help better understand my 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.

I used Rentschler's evolutionary framework for the arts marketing profession to consider where my case study venues were placed. I believe this was important in framing my 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 I understand a lack of resources contributes to this, there was evidence that some of my 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 (Business and Arts South Africa, 2014). 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 (Jobs.co.za, 2012) and the live music sector has the potential to take advantage of that talent to help professionalise the sector.

My research found that all of the venues interviewed feel artists rely 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 further embedding audience development in the existing professional development opportunities for artists and arts professionals, the sector could benefit from more collaborative working. For example, 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 I 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 I feel the approach could be helpful for small live music venues who don't have the resources alone to invest in marketing and audience development.

My 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 aims (Maitland, 2009, p. 22). I believe 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, I would argue that audience development can't be considered in isolation by one person, it should be shared philosophy across the venue's management and staff (Maitland, 2009, p. 20). 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 (Maitland, 2009, pp. 21-22). All of my case study venues were interested in retaining and growing their audiences, and therefore could benefit from professionalising their audience segmentation, marketing and research strategies.

As well as understanding the level of understanding and practice of audience development by venues, I 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 years (StanLib, 2010).

As my research indicated, young people 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 my research indicated young people 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 young people (Péguillan, 2014). The *Red Mug Sessions* are a collaboration with *Nescafe* which targets young people 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 young people interacting with each other and encourage social media engagement during the event (Nescafe, 2015). 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 my case study venues using a motivation-based segmentation strategy is the Soweto Arts and Craft Fair. They have identified young 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, they adopt a dual strategy of showcasing mainstream artists alongside up-and-coming artists in order to respond to the motivations of both audiences (Twala, 2014).

While young South Africans do seek out opportunities to socialise with their friends at live music events, the young people I interviewed were in search of a deeper emotional connection and self-actualisation with music. The research indicates emotional connection with live music was stronger for women, which could be explored further in a larger survey or future BASA *Artstrack* reports.

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 indicates young 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 people's 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 Kitcheners 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 (Morris Hargreaves McIntyre, 2013, p. 32), but also a current consumer trend in South Africa (Barkworth, 2014). 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, my research indicates that consumption of live music is more focused on the multi-sensory and emotive aspects of their experience, their hedonic consumption (Radbourne et al. 2009, p. 18). This deeper connection with the experience responds to the phenomenon I explored in my literature review and findings chapter 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. By escapism I mean 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 (Barkworth, 2014). This supports my research findings and aligns closely with young people's desire for authenticity. Afrikan Freedom Station capitalises on young people's desire for mindfulness by combining a programme of live music, film, poetry and visual art that explores more than art, but broader notions of living as young African today.

My research supports Osborne and Rentschler's argument that authenticity is a vital ingredient in developing relationships with audiences (Osbourne & Rentschler, 2010, pp. 61-67). 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, I 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 when 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 young people 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. My research sample of young people rejects 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.

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

Lack of disposable income, access to public transport and safety are three legacies of apartheid which have created barriers to young 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 young audiences. Personal safety is a concern for young 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 young people in locations in close proximity to universities or youth-heavy 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 young people to live music events.

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. I would encourage venues 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. My research found that young people are willing to attend live music more frequently at a lower price point than mature audiences who attend less frequently. 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 I just 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. There are many examples, however I will just reference, *Orange Wednesdays*, which 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 (Orange, 2014). The 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 (Downie, 2014).

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 (Business and Arts South Africa, 2013). 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, it could help to grow a larger audience base to support the live music, arts and culture sectors. From my 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. I feel 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 (Concerts SA, 2015).

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. My 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.

Taking advantage of the opportunities presented through digital media is an important finding of this research from its potential as a communication channel with young people, 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 2015 *Live Music Audiences in Gauteng* report supports these findings with social media and venue websites the main channels 18-to-20-year-old and 21-to-29-year-old respondents' use to access information about live music events (O'Connor, 2015).

Marketing to young people through digital channels is not the only consideration for venues in today's climate as increasingly young audiences interact with each other online as part of their experience at live music events. I touched on the concept of 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 (Radbourne, 2000, p. 21). Social media now plays a central role in young 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'* (Nomsa, 2014).

Taking advantage of technology to better understand, and market to, audiences was an area all venues have 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 (Motseko, 2014). 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.

In conclusion, my 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. I believe there are considerable insights which could be explored further in future research undertaken with a larger and geographically diverse sample. 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.

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Appendices

Appendix A: List of figures

Figure 1: Maitland's Audience Grid (Maitland, 2009, p. 20)

Figure 2: RAND Behavioural Model (McCarthy & Jinnett, 2001, p. 24).

Figure 3: Maslow's Hierarchy of Needs (Waltl, 2006, p. 5)

Figure 4: Morris Hargreaves McIntyre Audience Development Model (Morris Hargreaves Hargreaves, 2013)

Figure 5: Arts Audiences: Insight 2011 – Urban Eclectic Profile (Arts Council England, 2011)

Figure 6: Primary Research Popular Music Genres

Figure 7: Case study venues mapped on Maitland's model

Figure 8: Case study venues mapped against Rentschler's evolutionary framework

Appendix B: Interview questions

Draft interview questions (young people)

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. **What is your ethnic origin?** Black / Coloured / Indian / 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 / Study / 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?**

SAARF LSM Question

<input type="checkbox"/> Metropolitan dweller (250 000+)	<input type="checkbox"/> DVD Player / Blu Ray Player
<input type="checkbox"/> Living in a non-urban area	<input type="checkbox"/> Refrigerator or combined fridge/freezer
<input type="checkbox"/> House / Cluster House / Town House	<input type="checkbox"/> Electric Stove
<input type="checkbox"/> Tap water in house / on plot	<input type="checkbox"/> Microwave oven
<input type="checkbox"/> Flush Toilet inside house	<input type="checkbox"/> Deep Freezer - Free Standing
<input type="checkbox"/> Hot running water	<input type="checkbox"/> Have a washing machine
<input type="checkbox"/> Built in Kitchen Sink	<input type="checkbox"/> Have a tumble dryer
<input type="checkbox"/> No Domestic Workers or Gardeners	<input type="checkbox"/> Dishwashing Machine
<input type="checkbox"/> Home security service	<input type="checkbox"/> PayTV (M-net / DSTV / TopTV) Subscription
<input type="checkbox"/> 2 Cellphones in Household	<input type="checkbox"/> Home Theatre System
<input type="checkbox"/> 3 or more Cellphones in Household	<input type="checkbox"/> Vacuum Cleaner
<input type="checkbox"/> Zero or One Radio set in Household	<input type="checkbox"/> Motor Vehicle in Household
<input type="checkbox"/> Air conditioner (excl. fans)	<input type="checkbox"/> Computer - Desktop / Laptop
<input type="checkbox"/> Have TV set(s)	<input type="checkbox"/> Land line (excl. Cellphone)
<input type="checkbox"/> Swimming Pool	

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 there 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?

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 your 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 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?

Appendix C: Respondent profiles

The following respondents were interviewed by myself 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 my network of 18-to-25-year-olds connected with my professional role at youth agency Livity Africa.

General Points

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 I 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 (Lesedi, 2014).

LSM Profile: **LSM 8 Low** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Over two thirds of these people will still catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

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 (Nzolo, 2014).

LSM Profile: **LSM 8 High** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Over two thirds of these people will still catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

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 (Ntombenhle, 2014).

LSM Profile: **LSM 8 High** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Over two thirds of these people will still catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

Venues attended: The Orbit and Afrikan Freedom Station



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 (Modisaotsile, 2014).

LSM Profile: **LSM 5** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Nearly two thirds of these people catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

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 (Lethabo, 2014).

LSM Profile: **LSM 9 High** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Over 90% of these people own a private car (Mindshare South Africa, 2013).

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 (5FM) 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 (Nomsa, 2014).

LSM Profile: **LSM 7 Low** (Eighty 20, 2015).

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 (South African Audience Research Foundation, 2012). Over two thirds of these people will still catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

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 (Polly, 2014).

LSM Profile: **LSM 7 Low** (Eighty 20, 2015)

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 (South African Audience Research Foundation, 2012). Over two thirds of these people will still catch mini taxis as their main mode of transport (Mindshare South Africa, 2013).

Venues attended: Soweto Theatre and Soweto Arts and Craft Fair

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