# ARTSTRACK

# NO.8

BIANNUAL RESEARCH REPORT | JULY 2019

BUSINESS AND ARTS SOUTH AFRICA

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# INTRODUCTION

# INTRODUCTION

## BACKGROUND

***While sport has been by far the most prominent area for sponsorships over the past two decades, the interest in alternative sponsorships is nevertheless also on the increase. As the sport sponsorship market becomes increasingly cluttered and expensive, with rights fees consistently exceeding the consumer price index (CPI), more and more companies are turning to alternative opportunities that offer value-for-money solutions, which can achieve a desired impact within their target markets.***

All leisure and lifestyle activities are seen as potential sponsorship opportunities in this regard. This includes arts, culture, music, the environment, festivals, museums, zoos and other social activities. For the most part however, the bulk of these activities do not create the same kind of media interest as sports do.

For years, music has been sponsored by commercial brands as an alternative to sport. It has significant numbers of followers and high entertainment value. It is also something about which consumers feel very emotional, which allows for that special connection to be created between a brand and its consumers' media interest, and if handled correctly, can also be significant. An ever-growing number of companies are becoming involved in the music market.

Historically, a lack of proper, detailed information on this market has limited progress with potential sponsors not having information available on the quantification and segmentation of this market to make informed decisions. This is particularly the case for many arts and cultural activities, which as a result often leads to corporate social investment (CSI) funding rather than sponsorship.

For this reason, BMi launched Music and ArtsTrack in 2001. As a syndicated project, it also means that participating companies could reap the benefits of a significant research programme, at a fraction of what it would have cost if they had to conduct this research individually.

This report of 2019 represents the eighth update of the original report.

***NOTE:*** *This report is in essence a database of demographic quantifications and trends. While it lays a solid scientific information platform on which to base selection decisions, it is not meant to formulate a comprehensive strategy for each potential music or arts sponsor.*

# METHODOLOGY

## RESEARCH OBJECTIVES

The aim of this research is to evaluate the popularity of music, arts and cultural events, including the quantification and analysis of audience sizes, genres, and other key demographics of those with an interest in the aforementioned areas.

In the 'Arts and Culture Sponsorship' section of the report, qualitative research on the broader arts and entertainment industry has been provided, inclusive of both attitudinal impacts and sponsorship association levels of brands that are currently active in this space.

Where possible, comparisons are drawn with previous reports.

Results were further segmented by age, gender and population group, where variances amongst the demographics were of significance.

## RESEARCH METHOD

This project is based on consumer research amongst a total sample of approximately 3 500 South Africans, aged 15 years and older.

- All interviews were done personally, at the places of residence, in the home language of the respondent.
- All respondents were selected at random.
- For each group, an area-stratified probability sample was drawn at random by interviewing every *nth* household, starting on different corners within the different areas. The person interviewed was selected on a random basis, by making use of an adaptation of the Politz Grid.
- A back-check of 25% was conducted as part of quality control measures.
- A structured questionnaire was used. Results were computer-analysed and this report prepared.

The specific sample details will follow.

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BUSINESS AND ARTS SOUTH AFRICA

## NATIONAL SAMPLE – BASA ARTSTRACK NO. 8

| | TOTAL | BLACK | WHITE | COLOURED | ASIAN |
|---|---|---|---|---|---|
| **INTERVIEWS [#]** | 3 508 | 1 553 | 955 | 650 | 350 |
| **Gender** | | | | | |
| **Male** [%] | 49 | 49 | 50 | 49 | 48 |
| **Female** [%] | 51 | 51 | 50 | 51 | 52 |
| **Age** | | | | | |
| **15–18 years** [%] | 9 | 9 | 8 | 13 | 16 |
| **19–24 years** [%] | 21 | 24 | 19 | 21 | 18 |
| **25–34 years** [%] | 25 | 28 | 22 | 26 | 22 |
| **35–49 years** [%] | 27 | 26 | 29 | 23 | 22 |
| **50+ years** [%] | 17 | 13 | 21 | 17 | 22 |
| **Income** | | | | | |
| **R0–R4 999** [%] | 3 | 4 | 2 | 3 | 0 |
| **R5 000–R7 999** [%] | 17 | 23 | 10 | 19 | 10 |
| **R8 000–R14 999** [%] | 23 | 26 | 20 | 17 | 18 |
| **R15 000–R24 999** [%] | 19 | 19 | 19 | 19 | 22 |
| **R25 000–R39 999** [%] | 14 | 11 | 16 | 15 | 20 |
| **R40 000–R54 999** [%] | 12 | 9 | 15 | 12 | 18 |
| **R55 000–R69 999** [%] | 8 | 6 | 10 | 9 | 10 |
| **R70 000+** [%] | 5 | 3 | 8 | 6 | 2 |
| **Region** | | | | | |
| **Bloemfontein** [%] | 8 | 8 | 9 | 0 | 0 |
| **Cape Town** [%] | 19 | 14 | 18 | 80 | 100 |
| **Durban** [%] | 22 | 24 | 19 | 0 | 0 |
| **Johannesburg** [%] | 21 | 23 | 20 | 0 | 0 |
| **Pretoria** [%] | 16 | 14 | 20 | 13 | 0 |
| **Port Elizabeth** [%] | 14 | 17 | 13 | 7 | 0 |

## VALIDITY AND LIMITATIONS

Market research is not an exact science [in the same way as an audit], but is always subject to statistical margins of error. The prime factors governing the statistical margin of error of sample surveys are the size of the sample and the unanimity of the responses.

The market research techniques employed to complete this report were all done according to accepted practices and norms of the industry.

The statistical margin of error at a 95% confidence level, on a sample size of 3 500 interviews, is 2% and, statistically. It can be concluded that the result will be as presented, plus or minus approximately 2%, in 95 out of 100 cases. In layman terms, one can be 95% confident that the results are statistically as presented, plus or minus approximately 2%.

The ArtsTrack report concentrated historically on the adult market, defined as 19 years and older; but for 2019, this was extended to include a representative sample of 15–18-year-olds.

Before quantifying and segmenting the arts, culture and music market, it is important to analyse the latest available population demographics for South Africa. How many people are there within different segments of the population?

Based on the latest available census figures, the 2018 mid-year population (as defined by this report), can be estimated as shown in the table to follow.

## 2018 STATISTICS SOUTH AFRICA POPULATION SURVEY – MID-YEAR RESULTS

| AGE CATEGORY | TOTAL [#] | TOTAL [%] | BLACK [#] | BLACK [%] | WHITE [#] | WHITE [%] | COLOURED [#] | COLOURED [%] | INDIAN/ ASIAN [#] | INDIAN/ ASIAN [%] |
|---|---|---|---|---|---|---|---|---|---|---|
| < 25 Years | 9 752 951 | 100 | 8 231 188 | 84 | 496 905 | 5 | 834 669 | 9 | 190 189 | 2 |
| 50+ Years | 9 374 252 | 100 | 6 180 288 | 66 | 1 776 972 | 19 | 1 046 691 | 11 | 370 301 | 4 |
| < 35 Years | 20 585 144 | 100 | 17 394 694 | 85 | 1 064 689 | 5 | 1 674 326 | 8 | 451 434 | 2 |
| > 35 Years | 20 096 944 | 100 | 14 638 984 | 73 | 2 726 480 | 14 | 2 013 995 | 10 | 717 485 | 4 |
| **TOTAL (15+ YEARS)** | **40 682 088** | **100** | **32 033 678** | **79** | **3 791 170** | **9** | **3 688 321** | **9** | **1 168 919** | **3** |

# QUANTIFICATION OF THE ARTS, CULTURE AND MUSIC MARKET IN SOUTH AFRICA 2019

| MUSIC, ARTS AND CULTURE MARKET | BLACK | WHITE | COLOURED | INDIAN/ ASIAN | TOTAL |
|---|---|---|---|---|---|
| South African Population – 2018 Stats SA [#] | 32 033 678 | 3 791 170 | 3 688 321 | 1 168 919 | 40 682 088 |
| Population that regularly follows arts and culture [%] | 53 | 33 | 38 | 40 | 49 |
| Population interested in arts and culture [#] | 16 977 849 | 1 251 086 | 1 401 562 | 467 568 | 20 098 065 |
| Population that regularly listens to music [%] | 64 | 59 | 53 | 51 | 62 |
| Population inter-ested in music [#] | 20 437 487 | 2 217 834 | 1 958 498 | 595 564 | 25 209 384 |

# QUANTIFICATION AND SEGMENTATION OF THE ARTS AND CULTURE MARKET

# QUANTIFICATION AND SEGMENTATION OF THE ARTS AND CULTURE MARKET

## INTEREST LEVELS IN DIFFERENT ARTS AND CULTURE ACTIVITIES

Respondents were asked the level of interest they have in a list of specific arts and cultural activities.

For quantification purposes, we focus mainly on those 'extremely interested', noting that casual interest can however indicate opportunities for future growth for each of the listed arts and cultural segments.

### LEVEL OF INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE OF TOTAL SAMPLE

| TOTAL SAMPLE (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 51 | 29 | 80 | 8 | 6 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 43 | 28 | 72 | 11 | 8 |
| Theatre | 16 | 15 | 32 | 16 | 15 |
| Sculptures/paintings/ photography/exhibition | 14 | 16 | 30 | 16 | 15 |
| Literature/poetry | 14 | 14 | 28 | 15 | 15 |
| Crafts | 15 | 18 | 33 | 19 | 11 |
| Movies | 56 | 26 | 82 | 6 | 3 |
| Dance: traditional | 25 | 17 | 42 | 14 | 11 |
| Dance: contemporary | 18 | 20 | 37 | 16 | 12 |
| Ballet | 11 | 8 | 18 | 11 | 14 |

| TOTAL SAMPLE (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Opera | 10 | 7 | 18 | 10 | 14 |
| Museums | 16 | 17 | 32 | 14 | 13 |
| Arts festivals | 23 | 22 | 45 | 14 | 14 |

## LEVEL OF INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE OF BLACK POPULATION

| BLACK POPULATION (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 65 | 24 | 5 | 4 | 3 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 62 | 23 | 6 | 5 | 5 |
| Theatre | 23 | 17 | 21 | 11 | 29 |
| Sculptures/paintings/ photography/exhibition | 21 | 18 | 19 | 12 | 30 |
| Literature/poetry | 24 | 18 | 17 | 12 | 30 |
| Crafts | 20 | 17 | 21 | 11 | 31 |
| Movies | 60 | 21 | 7 | 3 | 9 |
| Dance: traditional | 40 | 20 | 12 | 7 | 21 |
| Dance: contemporary | 24 | 19 | 19 | 10 | 28 |
| Ballet | 15 | 8 | 14 | 15 | 48 |
| Opera | 15 | 9 | 13 | 15 | 48 |
| Museums | 22 | 17 | 14 | 13 | 33 |
| Arts festivals | 34 | 22 | 15 | 9 | 20 |

## BLACK INTEREST

Live music, music programmes, and movies all attract significant interest (+80%) amongst the Black population group.

Traditional dance and art festivals are of some interest to more than 50% of this population group.

## LEVEL OF INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE OF WHITE POPULATION

| WHITE POPULATION (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 35 | 35 | 10 | 9 | 12 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 24 | 31 | 16 | 13 | 17 |
| Theatre | 10 | 14 | 12 | 20 | 43 |
| Sculptures/paintings/ photography/exhibition | 9 | 15 | 14 | 19 | 44 |
| Literature/poetry | 6 | 11 | 14 | 20 | 50 |
| Crafts | 9 | 21 | 17 | 13 | 40 |
| Movies | 49 | 33 | 7 | 3 | 9 |
| Dance: traditional | 9 | 14 | 18 | 17 | 43 |
| Dance: contemporary | 9 | 19 | 14 | 17 | 41 |
| Ballet | 7 | 8 | 10 | 15 | 60 |
| Opera | 7 | 6 | 9 | 16 | 62 |
| Museums | 10 | 17 | 16 | 15 | 44 |
| Arts festivals | 12 | 20 | 15 | 20 | 34 |

## WHITE INTEREST

Movies (82%), followed by live music (70%), and music programmes (55%), attract strong interest amongst the White population group.

Art festivals, crafts and museums, while still popular, have found it increasingly difficult to retain interest levels amongst this demographic over the past five years.

## LEVEL OF INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE OF COLOURED POPULATION

| COLOURED POPULATION (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 47 | 30 | 11 | 6 | 7 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 32 | 42 | 15 | 7 | 4 |
| Theatre | 13 | 11 | 8 | 9 | 60 |
| Sculptures/paintings/ photography/exhibition | 9 | 9 | 10 | 6 | 66 |
| Literature/poetry | 8 | 8 | 10 | 6 | 68 |
| Crafts | 14 | 12 | 13 | 6 | 55 |
| Movies | 63 | 25 | 3 | 4 | 5 |
| Dance: traditional | 19 | 11 | 8 | 8 | 54 |
| Dance: contemporary | 23 | 16 | 11 | 5 | 46 |
| Ballet | 7 | 8 | 5 | 7 | 73 |
| Opera | 5 | 5 | 7 | 3 | 81 |
| Museums | 11 | 17 | 9 | 6 | 58 |
| Arts festivals | 21 | 19 | 9 | 11 | 39 |

## COLOURED INTEREST

Movies (88%), followed by live music and music programmes (± 75%), attract significant interest amongst the Coloured population.

Contemporary dance and art festivals are also of some interest to ± 40% of this population group.

## LEVEL OF INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE OF INDIAN/ASIAN POPULATION

| INDIAN/ASIAN POPULATION (15+ YEARS) [%] | EXTREMELY INTERESTED | SOMEWHAT INTERESTED | NEITHER/ NOR | NOT REALLY INTERESTED | NOT AT ALL INTERESTED |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 58 | 30 | 6 | 2 | 4 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 26 | 40 | 22 | 4 | 8 |
| Theatre | 6 | 18 | 24 | 20 | 32 |
| Sculptures/paintings/ photography/exhibition | 2 | 20 | 10 | 26 | 42 |
| Literature/poetry | 2 | 10 | 14 | 20 | 54 |
| Crafts | 4 | 22 | 18 | 16 | 40 |
| Movies | 61 | 27 | 6 | 3 | 3 |
| Dance: traditional | 22 | 44 | 16 | 6 | 12 |
| Dance: contemporary | 10 | 46 | 16 | 10 | 18 |
| Ballet | 1 | 2 | 0 | 7 | 90 |
| Opera | 1 | 1 | 0 | 8 | 90 |
| Museums | 2 | 26 | 16 | 18 | 38 |
| Arts festivals | 6 | 42 | 16 | 10 | 26 |

### INDIAN/ASIAN INTEREST

Approximately 60% of the Indian/Asian community are extremely interested in movies and music performances.

Music programmes and traditional dance also attract strong interest albeit somewhat more casual.

There is also a strong casual interest in dance and art festivals.

# TOTAL INTEREST IN ARTS AND CULTURE ACTIVITIES

Total interest comprises those who classify themselves as ‘extremely interested’ (considered regular or passionate followers), as well as those who are ‘somewhat interested’ (considered more likely to have a casual or passing interest only).

## TOTAL INTEREST BY ARTS AND CULTURAL ACTIVITY – PERCENTAGE BY DEMOGRAPHICS

| TOTAL SAMPLE (15+ YEARS) [%] | TOTAL | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | 15–24 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Music performances (live events/festivals) | 80 | 88 | 69 | 77 | 88 | 79 | 80 | 86 | 85 | 72 | 61 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 72 | 84 | 54 | 84 | 66 | 66 | 77 | 74 | 75 | 68 | 60 |
| Theatre | 32 | 40 | 24 | 23 | 24 | 30 | 33 | 34 | 33 | 31 | 28 |
| Sculptures/paintings/ photography/exhibition | 30 | 39 | 23 | 18 | 22 | 28 | 31 | 31 | 32 | 28 | 26 |
| Literature/poetry | 28 | 41 | 16 | 16 | 12 | 27 | 29 | 31 | 29 | 26 | 22 |
| Crafts | 33 | 37 | 31 | 26 | 26 | 29 | 37 | 33 | 32 | 34 | 35 |
| Movies | 82 | 81 | 81 | 88 | 100 | 84 | 81 | 87 | 86 | 78 | 73 |
| Dance: traditional | 42 | 60 | 22 | 30 | 66 | 39 | 46 | 41 | 44 | 41 | 37 |
| Dance: contemporary | 37 | 43 | 28 | 39 | 56 | 34 | 41 | 42 | 41 | 32 | 27 |
| Ballet | 18 | 23 | 15 | 59 | 3 | 16 | 21 | 22 | 19 | 17 | 14 |
| Opera | 18 | 24 | 13 | 9 | 2 | 17 | 18 | 21 | 18 | 17 | 17 |
| Museums | 32 | 39 | 26 | 27 | 28 | 33 | 32 | 34 | 33 | 31 | 31 |
| Arts festivals | 45 | 57 | 31 | 41 | 48 | 43 | 46 | 47 | 48 | 41 | 40 |

When isolating age groups, it is clear how popular music is amongst those under 35 years’ old, compared to those over 35 years’ old.

In general, the youth are slightly more interested in the arts and cultural events listed.

*See the ‘COMPARISON OF INTEREST LEVELS IN ARTS AND CULTURE 2015 vs 2019’ table on page 16 for comparisons against 2015 levels of interest.*

## TOTAL INTEREST IN ARTS AND CULTURAL EVENTS – PERCENTAGE BY AGE GROUP

***NOTE:*** *Unlike the previous table, where we analysed the percentage interest within each population group, here we instead compare the overall split between them – where the sum of the four age groups equals 100% of the total population, 15+ years, who are interested in each activity.*

| 2018 POPULATION [%] | <25 YEARS | 25–34 YEARS | 35–49 YEARS | 50+ YEARS | TOTAL ADULTS |
|---|---|---|---|---|---|
| Music performances (live events/festivals) | 28 | 32 | 28 | 12 | 100 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 26 | 34 | 26 | 14 | 100 |
| Theatre | 18 | 32 | 29 | 21 | 100 |
| Sculptures/paintings/photography/exhibition | 24 | 29 | 28 | 19 | 100 |
| Literature/poetry | 13 | 23 | 35 | 29 | 100 |
| Crafts | 14 | 26 | 31 | 29 | 100 |
| Movies | 26 | 34 | 26 | 14 | 100 |
| Dance: traditional | 16 | 26 | 30 | 28 | 100 |
| Dance: contemporary | 25 | 34 | 26 | 15 | 100 |
| Ballet | 16 | 28 | 32 | 24 | 100 |
| Opera | 17 | 24 | 36 | 23 | 100 |
| Museums | 26 | 31 | 27 | 17 | 100 |
| Arts festivals | 22 | 35 | 25 | 18 | 100 |

## LEVEL OF INTEREST IN ARTS AND CULTURE ACTIVITY – PERCENTAGE LOCAL vs INTERNATIONAL INTEREST

Isolating those who claim to be interested, we then asked them to indicate if their interest is local, international, or both.

| ARTS AND CULTURE ACTIVITY | BLACK | | | WCI | | | TOTAL | | |
|---|---|---|---|---|---|---|---|---|---|
| | ONLY LOCAL [%] | ONLY INTERNATIONAL [%] | BOTH [%] | ONLY LOCAL [%] | ONLY INTERNATIONAL [%] | BOTH [%] | ONLY LOCAL [%] | ONLY INTERNATIONAL [%] | BOTH [%] |
| Music | 13 | 6 | 81 | 7 | 14 | 80 | 10 | 10 | 80 |
| Theatre | 29 | 7 | 64 | 23 | 10 | 67 | 26 | 9 | 65 |
| Sculptures/paintings/ photography/exhibition | 25 | 4 | 71 | 22 | 9 | 69 | 23 | 6 | 70 |
| Literature/poetry | 38 | 5 | 57 | 21 | 8 | 71 | 32 | 6 | 62 |
| Crafts | 32 | 8 | 60 | 27 | 10 | 63 | 29 | 9 | 62 |
| Movies | 10 | 7 | 83 | 2 | 20 | 78 | 5 | 14 | 80 |
| Dance: traditional | 57 | 5 | 38 | 21 | 12 | 67 | 43 | 8 | 49 |
| Dance: contemporary | 20 | 8 | 72 | 15 | 11 | 74 | 17 | 10 | 73 |
| Ballet | 9 | 9 | 82 | 24 | 5 | 71 | 16 | 7 | 77 |
| Opera | 12 | 4 | 84 | 6 | 9 | 86 | 10 | 6 | 85 |
| Museums | 40 | 4 | 57 | 31 | 4 | 64 | 36 | 4 | 60 |
| Arts festivals | 52 | 4 | 44 | 42 | 5 | 52 | 48 | 5 | 48 |

Isolating the Indian/Asian community showed noticeable above-average scores for 'only international' interest, for the following activities:

- Music: 23%
- Movies: 42%
- Traditional dance 24%

## COMPARISON OF TOTAL INTEREST IN ARTS AND CULTURE ACTIVITIES – PERCENTAGE 2015 VS 2019

| ARTS AND CULTURE ACTIVITY | BLACK INTEREST [%] | | WHITE INTEREST [%] | |
|---|---|---|---|---|
| | 2015** | 2019 | 2015** | 2019 |
| Music performances (live events/festivals) | - | 88 | - | 69 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | - | 84 | - | 54 |
| Theatre | 39 | 40 | 39 | 24 |
| Sculptures/paintings/photography/exhibition | 35 | 39 | 38 | 23 |
| Literature/poetry | 34 | 41 | 28 | 16 |
| Crafts | 39 | 37 | 41 | 31 |
| Movies | 74 | 81 | 81 | 81 |
| Dance: traditional | 67 | 60 | 24 | 22 |
| Dance: contemporary | 41 | 43 | 33 | 28 |
| Ballet | 16 | 23 | 20 | 15 |
| Opera | 21 | 24 | 17 | 13 |
| Museums | 40 | 39 | 40 | 26 |
| Art Festivals | 59 | 57 | 53 | 31 |

***The two periods are not directly comparable, as 2015 figures are based on adults 19 years and older, whereas 2019 data was extended to include those 15 years and older.*

Amongst the Black population, interest levels have remained fairly consistent, with nice gains off a small base in opera, ballet and literature.

Arts and cultural events, while still popular, have found it increasingly difficult to retain historic interest levels amongst an ageing and declining White population base.

# PASSIONATE INTEREST IN ARTS AND CULTURE ACTIVITIES

Those who classify themselves as 'extremely interested' and are considered regular or passionate followers, can be further quantified as follows.

## PASSIONATE INTEREST BY ARTS AND CULTURE ACTIVITY – PERCENTAGE BY DEMOGRAPHICS

| TOTAL SAMPLE (15+ YEARS) [%] | TOTAL | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | 15–24 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Music performances (live events/festivals) | 51 | 65 | 35 | 47 | 58 | 51 | 51 | 60 | 59 | 41 | 34 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 43 | 62 | 24 | 32 | 26 | 39 | 48 | 50 | 49 | 36 | 30 |
| Theatre | 16 | 17 | 10 | 13 | 6 | 17 | 16 | 17 | 17 | 16 | 13 |
| Sculptures/paintings/ photography/exhibition | 14 | 18 | 9 | 9 | 2 | 15 | 13 | 16 | 15 | 13 | 11 |
| Literature/poetry | 14 | 18 | 6 | 8 | 2 | 15 | 14 | 15 | 15 | 13 | 10 |
| Crafts | 15 | 20 | 9 | 14 | 4 | 14 | 16 | 15 | 16 | 14 | 12 |
| Movies | 56 | 60 | 49 | 63 | 61 | 59 | 53 | 65 | 63 | 48 | 40 |
| Dance: traditional | 25 | 40 | 9 | 19 | 22 | 24 | 25 | 24 | 26 | 23 | 20 |
| Dance: contemporary | 18 | 19 | 9 | 23 | 10 | 19 | 17 | 21 | 20 | 14 | 11 |
| Ballet | 11 | 8 | 7 | 7 | 1 | 10 | 11 | 12 | 11 | 10 | 7 |
| Opera | 10 | 9 | 7 | 5 | 1 | 12 | 9 | 11 | 11 | 10 | 9 |
| Museums | 16 | 22 | 10 | 11 | 2 | 18 | 14 | 18 | 17 | 13 | 12 |
| Arts festivals | 23 | 34 | 19 | 21 | 6 | 24 | 22 | 23 | 25 | 21 | 20 |

This table illustrates the percentage within a specific population group, gender, or age group that regularly follows each activity.

For example, while only 39% of males regularly follow music programmes, when isolating females, this rises to 48%. The combined male and female total will therefore not equal 100%.

The following table looks at the overall split by code, between male and female interest.

## PASSIONATE INTEREST BY ARTS AND CULTURE ACTIVITY – PERCENTAGE BY GENDER

Unlike the previous table, where we analysed the percentage of interest within each gender group, here we instead compare the overall split by code, between percentage male and female interest.

| TOTAL SAMPLE (15+ YEARS) | MALE [%] | FEMALES [%] | TOTAL [%] |
|---|---|---|---|
| Music performances (live events/festivals) | 50 | 50 | 100 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 44 | 56 | 100 |
| Theatre | 50 | 50 | 100 |
| Sculptures/paintings/photography/exhibition | 52 | 48 | 100 |
| Literature/poetry | 51 | 49 | 100 |
| Crafts | 47 | 53 | 100 |
| Movies | 52 | 48 | 100 |
| Dance: traditional | 49 | 51 | 100 |
| Dance: contemporary | 52 | 48 | 100 |
| Ballet | 49 | 51 | 100 |
| Opera | 57 | 43 | 100 |
| Museums | 56 | 44 | 100 |
| Arts festivals | 51 | 49 | 100 |

In arts and culture activities, unlike sport, the split between genders tends to be fairly equal. There are, however, a few noticeable exceptions.

## PASSIONATE INTEREST BY ARTS AND CULTURE ACTIVITY – NUMBER AND PERCENTAGE BY POPULATION GROUP

Unlike the 'PASSIONATE INTEREST BY ARTS AND CULTURE ACTIVITY – PERCENTAGE BY DEMOGRAPHICS' table, where we analysed the percentage interest within each population group, here we instead compare the overall split between them – where the sum of the four groups (BWCI) equals 100% of the total population, 15+ years, who are extremely interested in each activity.

| TOTAL SAMPLE (15+ YEARS) | TOTAL [#] | TOTAL [%] | BLACK [#] | BLACK [%] | WHITE [#] | WHITE [%] | COLOURED [#] | COLOURED [%] | INDIAN/ASIAN [#] | INDIAN/ASIAN [%] |
|---|---|---|---|---|---|---|---|---|---|---|
| Music performances (live events/festivals) | 16 172 071 | 100 | 12 454 134 | 77 | 1 270 795 | 8 | 1 769 180 | 11 | 677 962 | 4.2 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | 14 598 159 | 100 | 11 834 123 | 81 | 867 860 | 6 | 1 592 262 | 11 | 303 914 | 2.1 |
| Theatre | 4 157 120 | 100 | 3 234 840 | 78 | 371 940 | 9 | 480 206 | 12 | 70 134 | 1.7 |
| Sculptures/paintings/ photography/exhibition | 4 177 015 | 100 | 3 477 453 | 83 | 322 348 | 8 | 353 836 | 8 | 23 378 | 0.6 |
| Literature/poetry | 3 927 815 | 100 | 3 396 582 | 86 | 204 567 | 5 | 303 288 | 8 | 23 378 | 0.6 |
| Crafts | 4 806 462 | 100 | 3 881 808 | 81 | 347 144 | 7 | 530 754 | 11 | 46 756 | 1.0 |
| Movies | 16 616 605 | 100 | 11 537 596 | 69 | 1 791 511 | 11 | 2 375 756 | 14 | 911 742 | 5.5 |
| Dance: traditional | 8 909 810 | 100 | 7 628 831 | 86 | 316 149 | 4 | 707 672 | 8 | 257 158 | 2.9 |
| Dance: contemporary | 4 956 346 | 100 | 3 639 195 | 73 | 340 945 | 7 | 859 316 | 17 | 116 890 | 2.4 |
| Ballet | 2 126 939 | 100 | 1 590 463 | 75 | 260 358 | 12 | 252 740 | 12 | 23 378 | 1.1 |
| Opera | 3 307 930 | 100 | 2 857 442 | 86 | 266 557 | 8 | 176 918 | 5 | 7 013 | 0.2 |
| Museums | 5 067 268 | 100 | 4 286 163 | 85 | 353 343 | 7 | 404 384 | 8 | 23 378 | 0.5 |
| Arts festivals | 8 176 328 | 100 | 6 577 508 | 80 | 719 918 | 9 | 808 768 | 10 | 70 134 | 0.9 |

# COMPARISON OF PASSIONIONATE INTEREST IN ARTS AND CULTURE ACTIVITIES 2013–2019

## COMPARISON OF PASSIONIONATE INTEREST IN ARTS AND CULTURE ACTIVITIES – PERCENTAGE 2013–2019

| ARTS AND CULTURE ACTIVITY | BLACK PASSION [%] | | | WHITE PASSION [%] | | |
|---|---|---|---|---|---|---|
| | 2013** | 2015** | 2019 | 2011** | 2015** | 2019 |
| Music performances (live events/festivals) | - | - | 65 | - | - | 35 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | - | - | 62 | - | - | 24 |
| Theatre | 14 | 10 | 17 | 11 | 10 | 10 |
| Sculptures/paintings/ photography/exhibition | 13 | 9 | 18 | 9 | 8 | 9 |
| Literature/poetry | 14 | 10 | 18 | 8 | 7 | 6 |
| Crafts | 18 | 15 | 20 | 14 | 13 | 9 |
| Movies | 50 | 55 | 60 | 49 | 54 | 49 |
| Dance: traditional | 39 | 33 | 40 | 7 | 12 | 9 |
| Dance: contemporary | 15 | 13 | 19 | 12 | 10 | 9 |
| Ballet | 6 | 5 | 8 | 7 | 7 | 7 |
| Opera | 9 | 8 | 15 | 6 | 5 | 7 |
| Museums | 18 | 17 | 22 | 11 | 11 | 10 |
| Arts festivals | 29 | 26 | 34 | 23 | 17 | 19 |

*** The periods are not directly comparable, as 2011 and 2015 figures are based on adults 19 years and older, whereas 2019 data was extended to include those 15 years and older.*

## COMPARISON OF PASSIONIONATE INTEREST IN ARTS AND CULTURE ACTIVITIES – NUMBER 2013–2019

Those who classify themselves as ‘extremely interested’ and are considered regular or passionate followers can be further quantified as follows:

| TOTAL SAMPLE (15+ YEARS) | 2013** [# X 1 000] | 2015** [# X 1 000] | 2019 [# X 1 000] |
|---|---|---|---|
| Music performances (live events/festivals) | n/a | n/a | 16 172 |
| Music programmes (*SA Idols, The Voice, Joyous Celebration*, etc.) | n/a | n/a | 14 598 |
| Theatre | 3 681 | 3 341 | 4 157 |
| Sculptures/paintings/photography/exhibition | 3 300 | 3 005 | 4 177 |
| Literature/poetry | 3 529 | 3 319 | 3 928 |
| Crafts | 4 990 | 4 983 | 4 806 |
| Movies | 17 434 | 18 757 | 16 617 |
| Dance: traditional | 10 268 | 9 509 | 8 910 |
| Dance: contemporary | 4 791 | 4 305 | 4 956 |
| Ballet | 1 774 | 1 782 | 2 127 |
| Opera | 2 496 | 2 509 | 3 308 |
| Museums | 5 426 | 5 290 | 5 067 |
| Arts festivals | 8 700 | 8 281 | 8 176 |

*** The periods are not directly comparable, as 2011 and 2015 figures are based on Adults 19 years and older, whereas 2019 data was extended to include those 15 years and older.*

## ENGAGEMENT LEVELS IN ARTS AND CULTURE ACTIVITIES

Those who indicated that they were 'somewhat' to 'extremely interested' were then asked a series of additional questions to further understand their varying levels of interest.

### ARTS AND CULTURAL EVENT ATTENDANCE – PERCENTAGE OF BLACK POPULATION

Respondents were asked how often they attend events in which they are interested.

| FREQUENCY OF ATTENDING (BLACK POPULATION 15+ YEARS) [%] | MORE THAN 10 TIMES A YEAR | 6–10 TIMES PER YEAR | 2–5 TIMES PER YEAR | ONLY ONCE A YEAR | LESS THAN ONCE A YEAR | NEVER |
|---|---|---|---|---|---|---|
| Music shows/concerts | 9 | 10 | 32 | 22 | 11 | 17 |
| Theatre | 3 | 3 | 8 | 16 | 13 | 58 |
| Sculptures/paintings/photography/art exhibition | 0 | 3 | 12 | 14 | 15 | 56 |
| Literature/poetry | 0 | 5 | 11 | 14 | 10 | 61 |
| Crafts | 1 | 3 | 9 | 19 | 8 | 60 |
| Movies watched at cinema | 12 | 8 | 31 | 11 | 15 | 23 |
| Dance: traditional | 5 | 7 | 26 | 18 | 11 | 34 |
| Dance: contemporary | 6 | 2 | 8 | 15 | 16 | 54 |
| Ballet | 1 | 2 | 5 | 6 | 6 | 81 |
| Opera | 1 | 1 | 5 | 9 | 3 | 82 |
| Museums/galleries visited | 2 | 3 | 14 | 14 | 12 | 54 |
| Arts festivals | 3 | 8 | 15 | 29 | 13 | 31 |

#### BLACK AUDIENCE

With the exception of movies and music events, the vast majority only attend these types of activities a maximum of once a year.

Music and movies (51%), traditional dance (38%), art festivals (26%), and museums (19%) receive the highest multiple attendance (two or more times per year).

## ARTS AND CULTURAL EVENT ATTENDANCE – PERCENTAGE OF WHITE, COLOURED, INDIAN/ASIAN POPULATION

| FREQUENCY OF ATTENDING (WCI POPULATION 15+ YEARS) [%] | MORE THAN 10 TIMES A YEAR | 6–10 TIMES PER YEAR | 2–5 TIMES PER YEAR | ONLY ONCE A YEAR | LESS THAN ONCE A YEAR | NEVER |
|---|---|---|---|---|---|---|
| Music shows/concerts | 2 | 8 | 28 | 22 | 18 | 22 |
| Theatre | 1 | 3 | 9 | 10 | 12 | 66 |
| Sculptures/paintings/photography/art exhibition | 1 | 1 | 6 | 11 | 10 | 72 |
| Literature/poetry | < 1 | 1 | 4 | 5 | 7 | 84 |
| Crafts | < 1 | 3 | 12 | 12 | 13 | 60 |
| Movies watched at cinema | 11 | 16 | 36 | 11 | 10 | 15 |
| Dance: traditional | 1 | 2 | 6 | 13 | 13 | 66 |
| Dance: contemporary | 1 | 3 | 11 | 14 | 11 | 61 |
| Ballet | < 1 | 1 | 3 | 5 | 6 | 86 |
| Opera | < 1 | 0 | 2 | 5 | 7 | 87 |
| Museums/galleries visited | < 1 | 1 | 12 | 11 | 19 | 57 |
| Arts festivals | 1 | 2 | 14 | 18 | 14 | 52 |

### WCI AUDIENCE

With the exception of movies (37%), the vast majority only attend these types of activities a maximum of once a year.

Music (63%), movies (38%), traditional dance (38%), and art festivals (17%) receive the highest multiple attendance (two or more times per year).

## ARTS AND CULTURE ACTIVITY ATTENDANCE – PREFERRED DAYS TO ATTEND

| DAY OF THE WEEK | POPULATION [%] | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|
| | BLACK | WCI | MALE | FEMALE | 15–24 YEARS | <35 YEARS | >35 YEARS | 50+ YEARS |
| Saturday | **79** | **80** | **77** | **82** | 82 | 82 | 77 | 75 |
| Sunday | 22 | 34 | 32 | 30 | 31 | 27 | 36 | 39 |
| Monday | 1 | 5 | 3 | 3 | 4 | 4 | 3 | 4 |
| Tuesday | 5 | 6 | 7 | 5 | 6 | 5 | 7 | 8 |
| Wednesday | 4 | 6 | 6 | 5 | 8 | 6 | 4 | 4 |
| Thursday | 7 | 9 | 9 | 8 | 10 | 8 | 8 | 9 |
| Friday | 28 | **48** | **48** | 36 | **51** | **47** | 34 | 31 |

Saturday remains the favourite day of the week to attend arts and cultural events/activities.

Friday is a clear second choice, particularly for males, Whites and those under 35 years' old.

Conversely, those over 35 years' old prefer Sunday marginally to Friday.

## ARTS AND CULTURE ACTIVITY ATTENDANCE – REASONS FOR ATTENDING BY POPULATION GROUP

Respondents were asked their reasons for attending certain events.

| REASONS FOR ATTENDING LIVE EVENTS (BLACK POPULATION 15+ YEARS) [%] | MAIN REASON | MINOR REASON | NOT A REASON |
|---|---|---|---|
| Live atmosphere | 69 | 11 | 20 |
| Supporting the arts/cause | 51 | 27 | 22 |
| Interaction with other supporters/fans | 57 | 22 | 21 |
| The party/social gathering/celebration | 55 | 24 | 22 |
| Get outside and do something | 50 | 33 | 18 |
| Family/friends event | 58 | 25 | 17 |
| Take children to learn about arts and culture | 47 | 23 | 30 |
| To meet artists/actors/celebrities | 50 | 25 | 25 |
| To invest/purchase works of art/other collectibles | 37 | 25 | 38 |

| REASONS FOR ATTENDING LIVE EVENTS (WCI POPULATION 15+ YEARS) [%] | MAIN REASON | MINOR REASON | NOT A REASON |
|---|---|---|---|
| Live atmosphere | 64 | 19 | 17 |
| Supporting the arts/cause | 36 | 32 | 32 |
| Interaction with other supporters/fans | 31 | 33 | 35 |
| The party/social gathering/celebration | 42 | 29 | 29 |
| Get outside and do something | 43 | 38 | 19 |
| Family/friends event | 52 | 27 | 22 |
| Take children to learn about arts and culture | 25 | 20 | 55 |
| To meet artists/actors/celebrities | 35 | 23 | 41 |
| To invest/purchase works of art/other collectibles | 11 | 20 | 69 |

The live atmosphere and socialising with friends and family are the main reasons given for attending events.

Interestingly, 'supporting the arts/causes', educating their children, and investment/purchasing art or collectibles is rated much higher amongst the Black market, relative to the WCI market.

## ARTS AND CULTURE ACTIVITY ATTENDANCE – REASONS FOR NOT ATTENDING BY POPULATION GROUP

Respondents were asked their reasons for **NOT** attending certain events.

| REASONS FOR NOT ATTENDING LIVE EVENTS (BLACK POPULATION 15+ YEARS) [%] | MAIN REASON | MINOR REASON | NOT A REASON |
|---|---|---|---|
| The cost of ticket/entry/admission | **47** | **9** | 44 |
| Additional costs of going out (babysitter, food, parking...) | **22** | **27** | 52 |
| Traffic/transportation/parking/inconvenient to get to venue | **26** | **24** | 50 |
| Do not have enough free time/too busy | 17 | **24** | 59 |
| Rather do other things with my time | 9 | 22 | 70 |
| Do not hear about event in time to make plans | **22** | 19 | 60 |
| No one else to go with | 12 | 16 | 72 |
| Do not know enough to enjoy some of these events | 14 | 20 | 66 |
| Do not feel comfortable at these events/do not fit in | 14 | 20 | 66 |
| Events are too boring/not interesting/exciting enough | 15 | **24** | 61 |

| REASONS FOR NOT ATTENDING LIVE EVENTS (WCI POPULATION 15+ YEARS) [%] | MAIN REASON | MINOR REASON | NOT A REASON |
|---|---|---|---|
| The cost of ticket/entry/admission | **57** | 19 | 25 |
| Additional costs of going out (babysitter, food, parking...) | 26 | 25 | 49 |
| Traffic/transportation/parking/inconvenient to get to venue | **33** | **30** | 37 |
| Do not have enough free time/too busy | 19 | 27 | 54 |
| Rather do other things with my time | 17 | 25 | 58 |
| Do not hear about event in time to make plans | 22 | 23 | 55 |
| No one else to go with | 8 | 18 | 74 |
| Do not know enough to enjoy some of these events | 19 | 21 | 59 |
| Do not feel comfortable at these events/do not fit in | 16 | 22 | 62 |
| Events are too boring/not interesting/exciting enough | 19 | 19 | 62 |

The cost of admission is the main reason cited by all demographics for not attending live events.

Transportation and the other additional costs associated with attending events were also cited as main contributing reasons for staying at home.

Early and/or better communication on the events could also help improve attendance figures.

## ARTS AND CULTURE ACTIVITY ATTENDANCE – MAIN REASONS FOR NOT ATTENDING BY REGION

Respondents were asked their **MAIN** reasons for **NOT** attending events.

| MAIN REASONS FOR NOT ATTENDING LIVE EVENTS (REGION) [%] | BLOEMFONTEIN | CAPE TOWN | DURBAN | JOHANNESBURG | PORT ELIZABETH | PRETORIA |
|---|---|---|---|---|---|---|
| The cost of ticket/entry/admission | **60** | 53 | **69** | 36 | **68** | 43 |
| Traffic/transportation/parking/inconvenient to get to venue | **17** | **32** | **47** | **27** | **23** | **26** |
| Do not hear about event in time to make plans | 13 | 10 | **27** | **33** | **35** | 18 |
| Do not know enough to enjoy some of these events | 20 | 13 | **29** | 9 | 19 | 18 |

While the main reasons remain the same across regions, it is interesting to see the degree to which they vary in certain categories.

## ARTS AND CULTURE ACTIVITY ATTENDANCE – MAIN REASONS FOR NOT ATTENDING BY GENDER AND AGE GROUP

Respondents were asked their **MAIN** reasons for **NOT** attending events .

| MAIN REASONS FOR NOT ATTENDING LIVE EVENTS (GENDER AND AGE GROUP) [%] | MALE | FEMALE | 15–24 YEARS | <35 YEARS | >35 YEARS | 50+ YEARS |
|---|---|---|---|---|---|---|
| The cost of ticket/entry/admission | 53 | 57 | **59** | 56 | 54 | 51 |
| Do not have enough free time/too busy | **20** | 17 | 15 | 13 | **19** | 13 |
| Rather do other things with my time | 15 | 14 | 16 | 13 | 16 | **24** |
| Do not hear about event in time to make plans | **22** | 17 | 17 | **20** | 18 | 18 |
| Do not feel comfortable at these events/do not fit in | 14 | 11 | 11 | 13 | 12 | **17** |

Again, while the main reasons tend to be fairly consistent, there are important variances to consider depending on the event's target market age and (to a lesser degree) gender.

# PREFERRED METHODS OF ARTS AND CULTURE CONSUMPTION

Those who indicated that they were somewhat to extremely interested were then asked a series of additional questions to further understand their preferred ways to follow each specific interest.

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE OF BLACK POPULATION

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| TYPE OF EVENT/ PROPERTY (BLACK POPULATION 15+ YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | **48** | **55** | 17 | 25 | 12 | 6 | 16 |
| Music events/shows | **63** | **78** | 21 | 29 | **24** | 5 | 3 |
| | | | | | | | |
| Theatre | 24 | 33 | 9 | 11 | 4 | 9 | 47 |
| Sculptures/paintings/ photography/exhibition | 22 | 28 | 12 | 18 | 2 | 9 | 46 |
| Literature/poetry | 23 | 28 | 12 | 23 | 9 | 8 | 46 |
| Dance | **39** | 43 | 12 | 14 | 3 | 7 | 37 |
| Ballet | 14 | 22 | 9 | 9 | 1 | 6 | 71 |
| Opera | 14 | 20 | 11 | 9 | 3 | 7 | 71 |
| Museums | **42** | 19 | 11 | 12 | 4 | 7 | 46 |
| Arts festivals | **54** | 45 | 14 | 20 | 5 | 5 | 25 |
| Soap operas | 12 | 82 | 12 | 16 | 4 | 5 | 15 |
| Movies/cinema | 59 | 59 | 21 | 17 | 1 | 8 | 14 |

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE OF WHITE, COLOURED, INDIAN/ASIAN POPULATION

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| TYPE OF EVENT/ PROPERTY (WCI POPULATION 15+ YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | 26 | 35 | 9 | 14 | 7 | 9 | 45 |
| Music events/shows | 58 | 70 | **29** | 34 | **19** | 8 | 10 |
| | | | | | | | |
| Theatre | 23 | 14 | 6 | 7 | 2 | 5 | 65 |
| Sculptures/paintings/ photography/exhibition | 14 | 12 | 5 | 9 | 1 | 6 | 71 |
| Literature/poetry | 7 | 8 | 4 | 8 | 3 | 7 | 81 |
| Dance | 26 | 42 | 13 | 18 | 1 | 6 | 44 |
| Ballet | 9 | 12 | 4 | 6 | 1 | 4 | 82 |
| Opera | 8 | 9 | 4 | 5 | 1 | 3 | 84 |
| Museums | 29 | 12 | 5 | 8 | 1 | 7 | 61 |
| Arts festivals | 32 | 23 | 7 | 14 | 3 | 8 | 49 |
| Soap operas | 7 | 46 | 6 | 6 | 1 | 5 | 50 |
| Movies/cinema | **67** | **82** | **32** | 19 | 3 | 10 | 5 |

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE BY GENDER

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| TYPE OF EVENT/ PROPERTY (MALE POPULATION 15+ YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | 31 | 38 | 11 | 16 | 11 | 8 | 41 |
| Music events/shows | 57 | 72 | **30** | 30 | 19 | 7 | 9 |
| | | | | | | | |
| Theatre | 21 | 20 | 9 | 10 | 2 | 7 | 63 |
| Sculptures/paintings/ photography/exhibition | 16 | 17 | 9 | 12 | 1 | 5 | 67 |
| Literature/poetry | 12 | 14 | 8 | 12 | 3 | 6 | 74 |
| Dance | 26 | 38 | 16 | 20 | 2 | 6 | 48 |
| Ballet | 9 | 12 | 7 | 7 | 0 | 4 | 84 |
| Opera | 10 | 12 | 7 | 6 | 2 | 2 | 85 |
| Museums | 32 | 14 | 8 | 12 | 2 | 6 | 60 |
| Arts festivals | 36 | 28 | 11 | 16 | 3 | 8 | 46 |
| Soap operas | 10 | 51 | 7 | 10 | 2 | 4 | 47 |
| Movies/cinema | 65 | **77** | **31** | 20 | 2 | 10 | 6 |

| TYPE OF EVENT/ PROPERTY (FEMALE POPULATION 15+ YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | **35** | 44 | 13 | 19 | 7 | 8 | 31 |
| Music events/shows | **62** | 73 | 23 | **35** | 21 | 7 | 7 |
| | | | | | | | |
| Theatre | 25 | 20 | 4 | 7 | 3 | 6 | 56 |
| Sculptures/paintings/ photography/exhibition | 17 | 16 | 6 | 11 | 1 | 9 | 60 |
| Literature/poetry | 12 | 14 | 5 | 13 | 6 | 7 | 67 |
| Dance | 34 | 46 | 9 | 14 | 2 | 7 | 36 |
| Ballet | 12 | 18 | 4 | 7 | 2 | 4 | 74 |
| Opera | 10 | 13 | 5 | 6 | 2 | 6 | 76 |
| Museums | **34** | 14 | 5 | 7 | 1 | 8 | 53 |
| Arts festivals | **41** | 31 | 8 | 17 | 4 | 6 | 38 |
| Soap operas | 7 | 63 | 8 | 8 | 2 | 5 | 32 |
| Movies/cinema | 63 | 72 | 27 | 17 | 2 | 8 | 9 |

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE BY AGE GROUP

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| TYPE OF EVENT/ PROPERTY (< 35 YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | 33 | 41 | **14** | **19** | 8 | 8 | 36 |
| Music events/shows | **63** | 75 | **33** | **39** | 21 | 7 | 5 |
| | | | | | | | |
| Theatre | 23 | 21 | 7 | **9** | 2 | 6 | 58 |

| TYPE OF EVENT/ PROPERTY (< 35 YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Sculptures/paintings/ photography/exhibition | 18 | 19 | 8 | **12** | 1 | 7 | 61 |
| Literature/poetry | 13 | 16 | 7 | **14** | 5 | 7 | 67 |
| Dance | 32 | 43 | 15 | **18** | 2 | 6 | 38 |
| Ballet | 11 | 16 | 7 | **6** | 2 | 5 | 78 |
| Opera | 10 | 13 | 7 | **6** | 2 | 5 | 79 |
| Museums | 33 | 15 | 7 | **10** | 1 | 7 | 56 |
| Arts festivals | 41 | 30 | 11 | **19** | 3 | 7 | 39 |
| Soap operas | 9 | 57 | 9 | **10** | 2 | 5 | 40 |
| Movies/cinema | 71 | 73 | **35** | **22** | 2 | 8 | 5 |

| TYPE OF EVENT/ PROPERTY (> 35 YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/ PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Arts and cultural events | 32 | 42 | **9** | **15** | 10 | 8 | 37 |
| Music events/shows | 55 | 69 | **16** | **22** | 20 | 7 | 12 |
| | | | | | | | |
| Theatre | 23 | 18 | 6 | 8 | 3 | 7 | 62 |
| Sculptures/paintings/ photography/exhibition | 14 | 14 | 7 | 11 | 1 | 7 | 67 |
| Literature/poetry | 10 | 12 | 5 | 10 | 3 | 7 | 75 |
| Dance | 27 | 42 | 8 | 16 | 2 | 6 | 48 |
| Ballet | 10 | 14 | 4 | 8 | 1 | 4 | 81 |
| Opera | 9 | 12 | 5 | 6 | 1 | 3 | 83 |
| Museums | 33 | 13 | 5 | 8 | 2 | 7 | 57 |
| Arts festivals | 35 | 29 | 7 | 12 | 5 | 7 | 46 |
| Soap operas | 7 | 58 | 6 | 7 | 2 | 4 | 39 |
| Movies/cinema | 55 | **77** | 20 | 13 | 2 | **11** | 11 |

## SOCIAL MEDIA PLATFORMS AND HOW THEY ARE USED TO ENGAGE – PERCENTAGE OF TOTAL SAMPLE

Participants were asked about the social media platforms they use and the manner in which they engage with each platform.

| TOTAL SAMPLE (15+ YEARS) [%] | FACEBOOK | TWITTER | WHATSAPP | YOUTUBE | SNAPCHAT | INSTAGRAM | WECHAT |
|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **60** | **24** | **58** | **45** | **15** | **23** | **12** |
| Post comments/ engage with others | **72** | 57 | **77** | 26 | 50 | 47 | 50 |
| Share/post pictures | 68 | **62** | 72 | 28 | **66** | 51 | 40 |
| Share/watch video clips | 67 | 60 | 68 | **59** | 54 | **53** | **52** |
| Only follow | 12 | 26 | 8 | 33 | 21 | 24 | 29 |

Facebook and WhatsApp have the highest percentage of users (of the platforms listed).

Where historically YouTube was the top-of-mind choice for video content, it is now evident the growing importance all platforms must now place on sharing photos and clips.

## FACEBOOK AND WHATSAPP USER ENGAGEMENT – PERCENTAGE BY DEMOGRAPHICS

| FACEBOOK USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **60** | **46** | **67** | **59** | **62** | **68** | **32** | **67** | **50** |
| Post com-ments/engage with others | 72 | 88 | 68 | 72 | 73 | 69 | 62 | 74 | 69 |
| Share/post pictures | 68 | 78 | 65 | 66 | 69 | 72 | 65 | 68 | 67 |
| Share/watch video clips | 67 | 73 | 66 | 70 | 65 | 69 | 65 | 69 | 64 |
| Only follow | 12 | 9 | 13 | 10 | 13 | 14 | 8 | 11 | 13 |

| WHATSAPP USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **58** | **41** | **65** | **58** | **57** | **64** | **46** | **61** | **53** |
| Post comments/engage with others | 77 | 82 | 75 | 72 | 81 | 79 | 62 | 78 | 75 |
| Share/post pictures | 72 | 87 | 68 | 72 | 73 | 62 | 57 | 74 | 70 |
| Share/watch video clips | 68 | 86 | 63 | 69 | 68 | 59 | 57 | 69 | 66 |
| Only follow | 8 | 5 | 8 | 7 | 8 | 12 | 19 | 6 | 10 |

## YOUTUBE USER ENGAGEMENT – PERCENTAGE BY DEMOGRAPHICS

| YOUTUBE USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **45** | **31** | **52** | **45** | **46** | **47** | **22** | **52** | **36** |
| Post comments/engage with others | 26 | 39 | 23 | 26 | 26 | 28 | 28 | 27 | 25 |
| Share/post pictures | 28 | 37 | 25 | 26 | 29 | 48 | 17 | 30 | 23 |
| Share/watch video clips | 59 | 46 | 62 | 60 | 58 | 64 | 50 | 61 | 55 |
| Only follow | 33 | 44 | 31 | 34 | 33 | 24 | 50 | 30 | 40 |

## TWITTER AND INSTAGRAM USER ENGAGEMENT – PERCENTAGE BY DEMOGRAPHICS

| TWITTER USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| PERCENTAGE THAT USES PLATFORM | 24 | 27 | 23 | 24 | 25 | 32 | 11 | 29 | 16 |
| Post comments/engage with others | 57 | 59 | 56 | 55 | 59 | 59 | 44 | 61 | 46 |
| Share/post pictures | 62 | 56 | 65 | 59 | 65 | 47 | 56 | 65 | 55 |
| Share/watch video clips | 60 | 68 | 56 | 55 | 65 | 47 | 56 | 60 | 61 |
| Only follow | 26 | 27 | 26 | 35 | 19 | 41 | 44 | 24 | 33 |

| INSTAGRAM USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| PERCENTAGE THAT USES PLATFORM | 23 | 18 | 25 | 21 | 25 | 42 | 5 | 33 | 9 |
| Post comments/engage with others | 47 | 63 | 42 | 50 | 44 | 41 | 50 | 49 | 35 |
| Share/post pictures | 51 | 59 | 48 | 52 | 50 | 46 | 50 | 52 | 47 |
| Share/watch video clips | 53 | 56 | 53 | 60 | 48 | 50 | 50 | 56 | 41 |
| Only follow | 24 | 26 | 24 | 21 | 27 | 18 | 50 | 21 | 41 |

YouTube is a clear third, largely on the back of a very strong first mover position, as the video-sharing platform.

It is interesting to see how with Twitter, sharing pictures and short video clips is now even more popular than posting comments, particularly given the older age profile relative to the other popular platforms.

Instagram has a similar base to Twitter, although it clearly attracts a much younger profile user.

Snapchat and WeChat also appeal to a younger user base, those almost exclusively under the age of 35 years' old.

## SNAPCHAT AND WECHAT USER ENGAGEMENT – PERCENTAGE BY DEMOGRAPHICS

| SNAPCHAT USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **15** | **11** | **17** | **13** | **17** | **21** | **4** | **21** | **7** |
| Post comments/engage with others | 50 | 53 | 49 | 56 | 46 | 55 | 33 | 48 | 57 |
| Share/post pictures | 66 | 71 | 64 | 66 | 66 | 46 | 33 | 69 | 50 |
| Share/watch video clips | 54 | 59 | 53 | 53 | 55 | 36 | 33 | 57 | 43 |
| Only follow | 21 | 24 | 20 | 22 | 21 | 27 | 67 | 16 | 43 |

| WECHAT USERS [%] | TOTAL | BLACK | WCI | MALE | FEMALE | 13–18 YEARS | 50+ YEARS | <35 YEARS | > 35 YEARS |
|---|---|---|---|---|---|---|---|---|---|
| **PERCENTAGE THAT USES PLATFORM** | **12** | **13** | **11** | **9** | **14** | **13** | **4** | **15** | **6** |
| Post comments/engage with others | 50 | 70 | 40 | 48 | 51 | 57 | 67 | 52 | 42 |
| Share/post pictures | 40 | 50 | 34 | 44 | 37 | 14 | 33 | 39 | 42 |
| Share/watch video clips | 52 | 55 | 50 | 61 | 46 | 29 | 67 | 54 | 42 |
| Only follow | 29 | 25 | 32 | 22 | 34 | 29 | 33 | 28 | 33 |

# IMPORTANCE OF ACCESS TO SOCIAL AND DIGITAL CONTENT

## IMPORTANCE OF HAVING CONTENT ACCESSIBLE ON INTERNET AND SOCIAL MEDIA PLATFORMS – PERCENTAGE BY DEMOGRAPHICS

Participants were asked to rate how important is it to have certain types of content accessible on the Internet/social media platforms, on a scale of 1–10 (1 = unimportant and 10 = very important).

| ACCESS TO SOCIAL/ DIGITAL MEDIA CONTENT RATED AT AN IMPORTANCE LEVEL OF 9 OR 10 | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Sport | 50 | 63 | 36 | 48 | 46 | **63** | 38 | **53** | 54 | 46 | 38 |
| Movies and series | 52 | 58 | **45** | 51 | **58** | 56 | 48 | **57** | 59 | 44 | 38 |
| News and commerce | 57 | **74** | 33 | **70** | 50 | 60 | 53 | **55** | 57 | 56 | **50** |
| Music | 54 | **70** | 35 | 51 | 48 | 55 | 53 | **64** | **64** | 41 | 30 |
| Religion | 39 | 56 | 22 | 24 | 42 | 35 | 42 | 39 | 40 | 38 | 36 |
| Lifestyle | 31 | 45 | 16 | 24 | 38 | 28 | 34 | 34 | 34 | 28 | 25 |
| Arts and culture | 29 | 42 | 15 | 26 | 28 | 31 | 28 | 31 | 32 | 26 | **23** |

Black South Africans attach a much greater importance to having access to content available on the Internet and social media platforms, than the other population groups across most categories.

For males, sport is still king, whereas for females, music as well as news were joint top picks. News also featured strongly amongst males.

It is important to recognise how important social and digital media content is to varying age groups.

For example, TV audiences for sport clearly attract an older audience, with the majority of viewers often 50 years and older. As illustrated in this chart, younger audiences place a far greater importance on access to digital content.

The same applies to many music, arts and cultural programmes, which need to balance the need to communicate with the youth, against the reliance on their older target market, with traditional media communications.

## DOWNLOADING ARTS AND CULTURAL CONTENT FROM THE INTERNET

Participants were asked whether they download arts and culture content from the Internet.

| DOWNLOAD CONTENT FROM INTERNET | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Yes I download arts and culture | 20 | 27 | 17 | 17 | 16 | 18 | 22 | 21 | 23 | 15 | 9 |
| No I do not download | 80 | 73 | 83 | 83 | 84 | 82 | 78 | 79 | 77 | 85 | 91 |

## SUBSCRIPTIONS FOR PAY TV/STREAMING ARTS AND CULTURE CHANNELS

Participants were asked whether they would subscribe to or pay for arts and culture channels (via television or streaming).

| LIKELIHOOD OF SUBSCRIBING TO OR PAYING FOR ARTS CONTENT | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Yes I would subscribe to/pay for arts and cultural channel | 19 | 23 | 18 | 13 | 6 | 18 | 21 | 20 | 23 | 14 | 7 |
| No I would not pay | 81 | 77 | 82 | 87 | 94 | 82 | 79 | 80 | 77 | 86 | 93 |

## IMPORTANCE FOR CHILDREN TO RECEIVE ARTS AND CULTURAL EDUCATION – PERCENTAGE BY DEMOGRAPHICS

Participants were asked how important they think it is for their children to learn about arts and culture compared to sport.

| IMPORTANCE OF ARTS TO CHILDREN'S EDUCATION | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Arts and culture is more important | 6 | 8 | 5 | 5 | 4 | 4 | 7 | 9 | 7 | 4 | 6 |
| Sport is more important | 11 | 18 | 7 | 11 | 0 | 9 | 13 | 10 | 10 | 12 | 12 |
| Both are of equal importance | 42 | 37 | 35 | 55 | 42 | 48 | 37 | 37 | 44 | 40 | 35 |
| Neither are important | 41 | 37 | 53 | 29 | 54 | 39 | 44 | 44 | 39 | 44 | 48 |

While there are minor variances between the demographic profiles, it is concerning that approximately 40% of all respondents do not consider either sport or arts and culture important for their children's education.

# ABILITY TO USE ARTS AND CULTURE TO ATTRACT TOURISM – PERCENTAGE BY DEMOGRAPHICS

Respondents were asked which sectors of the arts and culture market they believe could be used best to attract tourists to South Africa.

| ACTIVITY THAT WILL ATTRACT TOURISM | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Music shows/concerts | 88 | 90 | 87 | 85 | 94 | 88 | 87 | 93 | 90 | 84 | 82 |
| Theatre | 65 | 63 | 61 | 73 | 54 | 66 | 63 | 67 | 67 | 61 | 64 |
| Sculptures/paintings/ photography/exhibition | 74 | 76 | 72 | 85 | 40 | 77 | 71 | 77 | 75 | 72 | 70 |
| Literature/poetry | 48 | 59 | 43 | 53 | 16 | 49 | 46 | 52 | 49 | 46 | 42 |
| Crafts/cultural markets | 78 | 72 | 79 | 87 | 68 | 79 | 77 | 73 | 77 | 80 | 81 |
| Movies | 57 | 51 | 56 | 69 | 42 | 60 | 54 | 64 | 61 | 51 | 49 |
| Dance: traditional | 79 | 86 | 72 | 87 | 58 | 77 | 81 | 74 | 75 | 84 | 83 |
| Dance: contemporary | 55 | 56 | 52 | 60 | 42 | 52 | 57 | 55 | 54 | 56 | 56 |
| Ballet | 41 | 37 | 43 | 51 | 18 | 39 | 43 | 39 | 40 | 43 | 42 |
| Opera | 43 | 40 | 44 | 51 | 20 | 43 | 42 | 41 | 42 | 43 | 45 |
| Museums/galleries | 80 | 81 | 81 | 83 | 66 | 83 | 78 | 83 | 79 | 82 | 85 |
| Arts festivals | 85 | 85 | 85 | 89 | 72 | 85 | 84 | 85 | 85 | 84 | 87 |

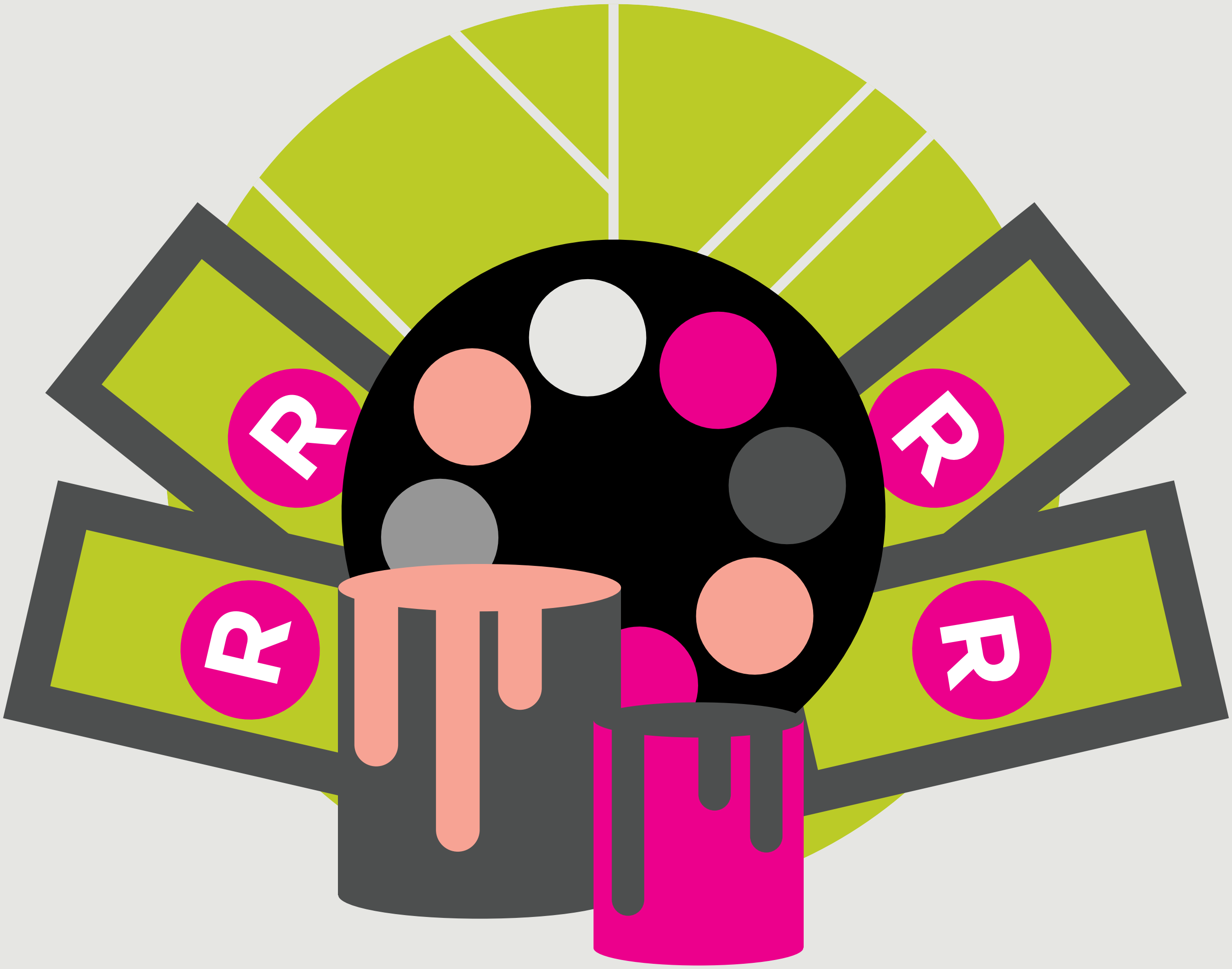
Overall, there is definitely positive sentiment towards the benefits of arts and culture activities for promoting tourism.

Music shows/concerts, arts festivals, museums and other crafts/cultural markets received the highest praise.

This table illustrates the percentage within a specific gender who regularly follow each activity.

For example, over 80% of males and females believe music shows/concerts can be used to attract tourism.

The combined male and female total will therefore not equal 100%.




# ARTS AND CULTURE SPONSORSHIP

Music shows/concerts were a clear top choice amongst the youth.

Isolating those over 50 years, more emphasis was placed on arts festivals, museums and traditional dance, than their younger counterparts.

# ARTS AND CULTURE SPONSORSHIP

## ESTIMATE OF THE ARTS AND CULTURE SPONSORSHIP MARKET

According to the most recently published 2018 BMi SportTrack™ report, sport sponsorship spend in South Africa reached an estimated R5 891 billion in direct spend on rights fees in 2017. The net result was a better-than-expected 3.5% growth year-on-year, for a market that could only be characterised as under pressure, but still holding its head above water.

Sponsors invested an estimated R645 million during 2018, across all disciplines within music arts and culture. Of this, music in all its forms continues to account for more than half this total, leaving the remainder for all the other arts and cultural genres.

The above figures consist largely of rights fees, which are the funds that are required by the beneficiaries (rights holders) in order to perform their events or tasks. This estimate is therefore directly comparable to the estimated direct sponsorship spend on sport. In addition to rights fees, companies sponsoring sport also spend significant amounts to leverage their sponsorships.

Despite the fact that sport activation budgets have been under increasing pressure – dropping from highs of over 85 cents, down to current levels below 50 cents (on average) for each R1 spent on rights fees – this is still significantly higher than comparable leverage budgets (35 cents: R1) usually associated with the arts.

The gap between music and the rest has stabilised somewhat, with movies, reality TV and art and cultural festivals, all beginning to offer unique opportunities to cut through the clutter of sport.

## ARTS AND CULTURE SPONSORSHIP AWARENESS AND ENGAGEMENT

### SPONTANEOUS AWARENESS OF ARTS AND CULTURE SPONSORS – PERCENTAGE BY POPULATION GROUP AND GENDER

The question asked was, ‘Please recall the names of all the companies that sponsor music in South Africa’.

In this way the spontaneous awareness of arts and culture sponsors could be determined.

| COMPANIES RESPONDENTS MENTIONED | BLACK [%] | | | | WHITE [%] | | | | COLOURED/ASIAN [%] | | | | GENDER 2019 | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2011 | 2013 | 2015 | 2019 | 2011 | 2013 | 2015 | 2019 | 2011 | 2013 | 2015 | 2019 | MALE [%] | FEMALE [%] |
| Standard Bank | 19 | 17 | 16 | 13 | 16 | 16 | 15 | 18 | 15 | 11 | 14 | 15 | 14 | 16 |
| ABSA | 14 | 8 | 10 | 6 | 18 | 23 | 21 | 17 | 12 | 12 | 9 | 10 | 13 | 9 |
| MTN | 14 | 15 | 11 | 9 | 7 | 6 | 5 | 4 | 11 | 9 | 8 | 3 | 3 | 6 |
| Coca-Cola | 8 | 8 | 7 | 2 | 5 | 4 | 3 | 2 | 7 | 6 | 4 | 1 | 1 | 2 |
| Telkom | 8 | 6 | 5 | 3 | 6 | 7 | 5 | 2 | 3 | 3 | 4 | 2 | 3 | 2 |
| Old Mutual | 7 | 7 | 6 | 3 | 6 | 3 | 2 | 2 | 4 | 2 | 2 | 2 | 3 | 2 |
| Vodacom | 9 | 6 | 5 | 3 | 6 | 5 | 2 | 6 | 10 | 7 | 7 | 3 | 3 | 4 |
| Nedbank | 5 | 3 | 4 | 3 | 6 | 6 | 6 | 4 | 4 | 6 | 6 | 4 | 3 | 4 |
| FNB | 5 | 4 | 3 | 2 | 1 | 4 | 5 | 7 | 8 | 7 | 7 | 7 | 7 | 4 |
| SABC | 3 | 3 | 3 | 6 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 3 | 2 |
| SA Breweries | 4 | 4 | 2 | 1 | 2 | 3 | 1 | 1 | 2 | 2 | 1 | 0 | 1 | 1 |
| Sasol | 2 | 2 | 2 | 4 | 4 | 5 | 4 | 5 | 2 | 2 | 2 | 3 | 4 | 3 |

Based on the above table, highest sponsor awareness has been ranked per population group:

| RANK | BLACK | WHITE | COLOURED/ASIAN |
|---|---|---|---|
| 1 | Standard Bank | Standard Bank | Standard Bank |
| 2 | MTN | ABSA | ABSA |
| 3 | ABSA | FNB | FNB |
| 4 | SABC | Vodacom | Nedbank |
| 5 | Sasol | Sasol | Vodacom |
| 6 | Telkom | Nedbank | MTN |
| 7 | Nedbank | MTN | Sasol |

It is interesting to note that 'government departments' generically received amongst the highest association levels as sponsors of arts and culture – particularly amongst the Black population group (20%).

While this is commendable, it also shows that arts and culture are still largely treated as CSI initiatives rather than commercial sponsorships by the vast majority of businesses currently involved.

## AWARENESS OF SPECIFIC ARTS AND CULTURE EVENT SPONSORSHIPS – PERCENTAGE BY DEMOGRAPHICS

Respondents were asked whether they are aware of specific sponsored arts and cultural events listed.

| AWARENESS OF SPONSORED ARTS AND CULTURE EVENT | TOTAL [%] | POPULATION GROUP [%] | | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WHITE | COLOURED | INDIAN/ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Absa/Barclays L'Atelier | 11 | 9 | 12 | 14 | 4 | 11 | 11 | 11 | 14 | 12 | 12 |
| National Arts Festival – Makhanda (formerly Grahamstown) | 38 | **41** | **57** | 22 | 18 | **39** | 37 | 24 | **42** | **39** | **38** |
| PPC Imaginarium Awards | 7 | 6 | 8 | 9 | 1 | 7 | 7 | 13 | 8 | 5 | 8 |
| Standard Bank Joy of Jazz Festival | 46 | **62** | 34 | **48** | **30** | **45** | **48** | 37 | **48** | **38** | **48** |
| Standard Bank Young Artist Awards | 29 | 29 | 24 | 33 | **32** | 28 | 30 | **30** | **35** | 29 | 30 |
| MTN *Joyous Celebration* | 40 | **81** | 20 | 23 | 24 | 38 | **42** | **33** | **40** | **36** | **40** |
| Macufe African Cultural Festival | 26 | **61** | 14 | 11 | 2 | 26 | 26 | **26** | 31 | 23 | 29 |
| Aardklop National Arts Festival | 26 | 12 | **48** | 27 | 2 | 26 | 27 | 17 | 24 | 30 | 24 |
| Oppikoppi Music Festival | 33 | 19 | **61** | 27 | 4 | 34 | 32 | **28** | **37** | 29 | 33 |
| Innibos Arts Festival | 20 | 7 | **47** | 14 | 0 | 21 | 20 | **24** | 18 | 24 | 19 |
| Klein Karoo National Arts Festival (KKNK) | 39 | 17 | **67** | **46** | 2 | **38** | **41** | **35** | **33** | **49** | **37** |
| Arts Alive International Festival | 9 | 12 | 9 | 7 | 2 | 8 | 10 | 11 | 10 | 6 | 9 |
| The Dance Umbrella | 8 | 8 | 8 | 11 | 0 | 6 | 10 | 11 | 6 | 7 | 9 |
| Design Indaba | 16 | 18 | 12 | 22 | 8 | 14 | 18 | 19 | 17 | 17 | 17 |
| Joburg FNB Art Fair | 11 | 14 | 12 | 7 | 14 | 10 | 13 | 9 | 11 | 11 | 11 |
| Investec Cape Town Art Fair | 8 | 5 | 6 | 16 | 2 | 7 | 9 | 9 | 8 | 10 | 8 |
| RMB Turbine Art Fair | 3 | 3 | 3 | 3 | 1 | 1 | 4 | 6 | 4 | 1 | 3 |

## PARTICIPATION IN SPONSORED ARTS AND CULTURE EVENTS – PERCENTAGE BY DEMOGRAPHICS

Those who claimed to be aware of the listed events were then asked if they follow or take part in them.

| FOLLOWING/PARTICIPATING IN SPONSORED ARTS AND CULTURE EVENT | POPULATION GROUP [%] | | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|
| | BLACK | WHITE | COLOURED/ASIAN | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Absa/Barclays L'Atelier | 2 | 3 | 3 | 3 | 2 | 3 | 2 | 2 | 4 |
| National Arts Festival – Grahamstown | **16** | **13** | 9 | 12 | 11 | 10 | 12 | 12 | 14 |
| PPC Imaginarium Awards | 1 | 2 | 1 | 1 | 2 | 1 | 2 | 1 | 1 |
| Standard Bank Joy of Jazz Festival | **17** | 4 | 6 | 9 | 7 | 9 | 8 | 8 | 8 |
| Standard Bank Young Artist Awards | 9 | 3 | 4 | 6 | 3 | 5 | 5 | 4 | 4 |
| MTN *Joyous Celebration* | **31** | 4 | 2 | 10 | 13 | 10 | 11 | 12 | 6 |
| Macufe African Cultural Festival | **18** | 3 | 2 | 9 | 5 | 10 | 8 | 5 | 4 |
| Aardklop National Arts Festival | 1 | 5 | 3 | 2 | 3 | 1 | 2 | 2 | 2 |
| Oppikoppi Music Festival | 2 | **12** | 3 | 7 | 4 | 10 | 7 | 3 | 2 |
| Innibos Arts Festival | 1 | **12** | 3 | 6 | 4 | 5 | 5 | 5 | 4 |
| Klein Karoo National Arts Festival (KKNK) | 1 | **21** | 9 | 9 | 9 | 2 | 8 | 11 | 14 |
| Arts Alive International Festival | 2 | 1 | 1 | 1 | 2 | 1 | 2 | 1 | 0 |
| The Dance Umbrella | 1 | 1 | 0 | 0 | 1 | 0 | 0 | 1 | 0 |
| Design Indaba | 1 | 3 | 5 | 2 | 4 | 5 | 3 | 2 | 4 |
| Joburg FNB Art Fair | 1 | 3 | 0 | 1 | 2 | 1 | 2 | 1 | 0 |
| Investec Cape Town Art Fair | 1 | 1 | 1 | 0 | 2 | 0 | 1 | 1 | 0 |
| RMB Turbine Art Fair | 1 | 1 | 0 | 0 | 1 | 2 | 1 | 0 | 0 |

# PERCEIVED SPONSORSHIP PRIORITIES

## ACTIVITIES THAT SHOULD BE SPONSORED – PERCENTAGE BY DEMOGRAPHICS

Respondents were asked which of the following platforms companies should sponsor, in their view.

| SPONSORSHIP PLATFORMS | TOTAL SAMPLE [%] | | | BLACK [%] | | | WCI [%] | | |
|---|---|---|---|---|---|---|---|---|---|
| | YES | NO | NOT SURE | YES | NO | NOT SURE | YES | NO | NOT SURE |
| Sport | **97** | 1 | 3 | **95** | 1 | 4 | **96** | 1 | 3 |
| Music | **95** | 3 | 3 | **94** | 5 | 1 | **90** | 4 | 6 |
| Theatre | 61 | 14 | 25 | 54 | 16 | 29 | 61 | 16 | 23 |
| Sculptures/paintings/ photography exhibition | 61 | 16 | 23 | 61 | 14 | 24 | 52 | 20 | 28 |
| Literature/poetry | 49 | 19 | 32 | 55 | 16 | 29 | 39 | 23 | 38 |
| Crafts | 64 | 15 | 21 | 61 | 15 | 24 | 56 | 19 | 25 |
| Movies | 64 | 20 | 16 | 62 | 19 | 19 | 59 | 25 | 17 |
| Dance: traditional | **71** | 14 | 15 | **81** | 9 | 10 | 59 | 17 | 23 |
| Dance: contemporary | 56 | 18 | 26 | 56 | 19 | 26 | 56 | 19 | 25 |
| Ballet | 41 | 27 | 31 | 35 | 29 | 35 | 47 | 27 | 27 |
| Opera | 41 | 26 | 33 | 40 | 26 | 35 | 43 | 28 | 30 |
| Museums | 69 | 13 | 18 | 66 | 14 | 20 | **70** | 14 | 16 |
| Arts festivals | **84** | 8 | 9 | **88** | 7 | 5 | **77** | 8 | 15 |

## ACTIVITIES THAT SHOULD BE SPONSORED (CONTINUED)

| SPONSORSHIP PLATFORMS | < 35 YEARS [%] | | | > 35 YEARS [%] | | | MALE [%] | | | FEMALE [%] | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | YES | NO | NOT SURE | YES | NO | NOT SURE | YES | NO | NOT SURE | YES | NO | NOT SURE |
| Sport | **97** | 0 | 3 | **96** | 2 | 2 | **97** | 1 | 2 | **96** | 1 | 3 |
| Music | **96** | 1 | 3 | **92** | 5 | 3 | **95** | 3 | 2 | **95** | 2 | 3 |
| Theatre | 60 | 13 | 27 | 62 | 17 | 21 | 59 | 16 | 25 | 62 | 12 | 26 |
| Sculptures/paintings/ photography exhibition | 58 | 17 | 25 | 64 | 15 | 21 | 62 | 16 | 22 | 60 | 15 | 25 |
| Literature/poetry | 47 | 19 | 34 | 52 | 19 | 19 | 47 | 21 | 32 | 51 | 18 | 32 |
| Crafts | 60 | 15 | 25 | 69 | 16 | 15 | 64 | 15 | 21 | 64 | 15 | 21 |
| Movies | 68 | 19 | 14 | 59 | 23 | 19 | 66 | 20 | 17 | 63 | 20 | 17 |
| Dance: traditional | **70** | 14 | 16 | **74** | 14 | 13 | 68 | 16 | 16 | **74** | 13 | 13 |
| Dance: contemporary | 58 | 16 | 26 | 53 | 21 | 26 | 54 | 18 | 28 | 58 | 17 | 25 |
| Ballet | 39 | 29 | 32 | 44 | 25 | 30 | 41 | 29 | 30 | 42 | 26 | 32 |
| Opera | 39 | 27 | 34 | 45 | 25 | 30 | 40 | 26 | 34 | 42 | 26 | 32 |
| Museums | 68 | 14 | 18 | **71** | 12 | 17 | **70** | 15 | 15 | 69 | 11 | 20 |
| Arts festivals | **84** | 8 | 8 | **83** | 8 | 9 | **81** | 10 | 9 | **86** | 7 | 7 |

# PERCEPTION OF ARTS, CULTURE AND MUSIC SPONSORS

## ATTITUDES TOWARDS ARTS, CULTURE AND MUSIC SPONSORS – PERCENTAGE BY DEMOGRAPHICS

Participants were asked whether or not they feel more positive towards companies that sponsor music.

| ATTITUDE TOWARDS COMPANIES THAT SPONSOR MUSIC | POPULATION GROUP [%] | | | | GENDER [%] | | AGE [%] | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | BLACK | WHITE | COLOURED | ASIAN | MALE | FEMALE | 15–24 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Yes – more positive | 65 | 44 | 47 | 58 | 55 | 50 | 62 | 55 | 48 | 36 |
| Feel the same | 35 | 56 | 53 | 42 | 45 | 50 | 37 | 44 | 52 | 64 |
| No – become negative | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |

Participants were asked whether or not they feel more positive towards companies that sponsor arts and culture.

| ATTITUDE TOWARDS COMPANIES THAT SPONSOR ARTS AND CULTURE | POPULATION GROUP (%) | | | | GENDER (%) | | AGE (%) | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | BLACK | WHITE | COLOURED | ASIAN | MALE | FEMALE | 15–24 YEARS | > 35 YEARS | <35 YEARS | 50+ YEARS |
| Yes – more positive | 58 | 33 | 25 | 38 | 39 | 38 | 39 | 39 | 38 | 30 |
| Feel the same | 41 | 65 | 72 | 62 | 60 | 59 | 59 | 59 | 61 | 69 |
| No – become negative | 1 | 2 | 3 | 0 | 1 | 3 | 2 | 2 | 2 | 1 |

## ATTITUDINAL BRAND IMPACTS FROM SPONSORING/ADVERTISING ARTS AND CULTURE – PERCENTAGE BY POPULATION GROUP

Participants were asked, on a scale of 1–5, whether they are likely to have a positive opinion of a brand that sponsors or advertises around arts and culture, where 1 = strongly disagree and 5 = strongly agree.

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF ARTS AND CULTURAL EVENTS (BLACK POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 0 | 7.8 | 26.8 | 30.7 | 35 |
| Have a positive opinion of a brand | 0.7 | 5.2 | 28.8 | 32.7 | 33 |
| Trust a brand that associates itself with the activities in which I am interested | 0.7 | 5.9 | 30.7 | 33.3 | 29 |
| Buy a product/service from a brand | 0 | 7.8 | 34.0 | 32.0 | 26 |
| Interact with a brand that offers promos/prizes with an event I enjoy | 0 | 5.9 | 28.8 | 34.6 | 31 |
| Interact with a brand that provides content I can access/download/share | 3.9 | 5.2 | 32.7 | 29.4 | 29 |
| Interact with a brand that provides an App with news, profiles, content | 4.6 | 8.5 | 27.5 | 37.3 | 22 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF ARTS AND CULTURAL EVENTS (WHITE POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 7.1 | 10.3 | 43.2 | 24.5 | 15 |
| Have a positive opinion of a brand | 5.8 | 12.9 | 41.3 | 27.1 | 13 |
| Trust a brand that associates itself with the activities in which I am interested | 7.1 | 14.8 | 39.4 | 24.5 | 14 |
| Buy a product/service from a brand | 8.4 | 18.1 | 35.5 | 21.9 | 16 |
| Interact with a brand that offers promos/prizes with an event I enjoy | 5.8 | 14.8 | 35.5 | 29.7 | 14 |
| Interact with a brand that provides content I can access/download/share | 7.7 | 17.4 | 33.5 | 28.4 | 13 |
| Interact with a brand that provides an App with news, profiles, content | 10.3 | 16.8 | 30.3 | 23.9 | 19 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF ARTS AND CULTURAL EVENTS (COLOURED POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 11.3 | 17.3 | 35.3 | 22.7 | 13 |
| Have a positive opinion of a brand | 9.3 | 14.0 | 38.0 | 26.7 | 12 |
| Trust a brand that associates itself with the activities in which I am interested | 9.3 | 17.3 | 40.7 | 22.7 | 10 |
| Buy a product/service from a brand | 12.0 | 20.7 | 46.0 | 14.0 | 7 |
| Interact with brand that offers promos/ prizes with an event I enjoy | 10.0 | 12.7 | 40.0 | 18.0 | 19 |
| Interact with brand that provides content I can access/download/share | 10.7 | 14.7 | 38.7 | 16.7 | 19 |
| Interact with brand that provides an App with news, profiles, content | 12.0 | 16.7 | 37.3 | 16.0 | 18 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF ARTS AND CULTURAL EVENTS (INDIAN/ ASIAN POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 0 | 6 | 34 | 34 | 26 |
| Have a positive opinion of a brand | 0 | 8 | 30 | 40 | 22 |
| Trust a brand that associates itself with the activities in which I am interested | 0 | 6 | 40 | 42 | 12 |
| Buy a product/service from a brand | 2 | 12 | 36 | 46 | 4 |
| Interact with brand that offers promos/ prizes with an event I enjoy | 2 | 22 | 28 | 40 | 8 |
| Interact with brand that provides content I can access/download/share | 14 | 24 | 32 | 20 | 10 |
| Interact with brand that provides an App with news, profiles, content | 12 | 20 | 40 | 20 | 8 |

## ATTITUDINAL BRAND IMPACTS FROM SPONSORING/ADVERTISING MUSIC – PERCENTAGE BY POPULATION GROUP

Participants were asked, on a scale of 1–5, whether they are likely to have a positive opinion of a brand that sponsors or advertises around music, where 1 = strongly disagree and 5 = strongly agree.

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF MUSIC EVENTS (BLACK POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 1.3 | 5.2 | 20.9 | 34.0 | 39 |
| Have a positive opinion of a brand | 0.7 | 5.9 | 20.3 | 29.4 | 44 |
| Trust a brand that associates itself with the activities in which I am interested | 0.7 | 8.5 | 19.6 | 31.4 | 40 |
| Buy a product/service from a brand | 0.7 | 5.9 | 26.1 | 30.7 | 37 |
| Interact with a brand that offers promos/prizes with an event I enjoy | 1.3 | 7.2 | 26.1 | 30.7 | 35 |
| Interact with a brand that provides content I can access/download/share | 3.9 | 4.6 | 25.5 | 32.0 | 34 |
| Interact with a brand that provides an App with news, profiles, content | 3.3 | 7.8 | 24.8 | 32.7 | 31 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF MUSIC EVENTS (WHITE POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 3.2 | 9.7 | 39.4 | 27.1 | 21 |
| Have a positive opinion of a brand | 3.9 | 9.7 | 33.5 | 31.0 | 22 |
| Trust a brand that associates itself with the activities in which I am interested | 4.5 | 9.7 | 32.3 | 34.2 | 19 |
| Buy a product/service from a brand | 5.2 | 12.9 | 41.9 | 24.5 | 16 |
| Interact with a brand that offers promos/prizes with an event I enjoy | 3.9 | 9.0 | 29.7 | 32.9 | 25 |
| Interact with a brand that provides content I can access/download/share | 3.2 | 11.6 | 29.0 | 34.2 | 22 |
| Interact with a brand that provides an App with news, profiles, content | 4.5 | 15.5 | 27.7 | 31.0 | 21 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF MUSIC EVENTS (COLOURED POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 8.7 | 12.7 | 30.0 | 26.0 | 23 |
| Have a positive opinion of a brand | 6.7 | 10.7 | 29.3 | 32.7 | 21 |
| Trust a brand that associates itself with the activities in which I am interested | 8.0 | 12.7 | 32.0 | 32.0 | 15 |
| Buy a product/service from a brand | 10.0 | 9.3 | 39.3 | 28.7 | 13 |
| Interact with brand that offers promos/ prizes with an event I enjoy | 5.3 | 6.7 | 30.0 | 25.3 | 33 |
| Interact with brand that provides con-tent I can access/download/share | 6.0 | 4.7 | 32.7 | 24.7 | 32 |
| Interact with brand that provides an App with news, profiles, content | 6.0 | 8.0 | 28.7 | 27.3 | 30 |

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ ADVERTISERS OF MUSIC EVENTS (INDIAN/ASIAN POPULATION) [%] | STRONGLY DISAGREE (1) | DISAGREE (2) | NEUTRAL (3) | AGREE (4) | STRONGLY AGREE (5) |
|---|---|---|---|---|---|
| Be interested in the brand | 0 | 4 | 20 | 44 | 32 |
| Have a positive opinion of a brand | 0 | 2 | 12 | 50 | 36 |
| Trust a brand that associates itself with the activities in which I am interested | 0 | 0 | 24 | 40 | 36 |
| Buy a product/service from a brand | 0 | 8 | 34 | 36 | 22 |
| Interact with brand that offers promos/ prizes with an event I enjoy | 0 | 8 | 30 | 44 | 18 |
| Interact with brand that provides con-tent I can access/download/share | 2 | 24 | 20 | 42 | 12 |
| Interact with brand that provides an App with news, profiles, content | 2 | 24 | 22 | 40 | 12 |

## ATTITUDINAL BRAND IMPACTS FROM SPONSORING/ADVERTISING MUSIC, ARTS AND CULTURAL PLATFORMS – PERCENTAGE THAT FULLY AGREE WITH EACH STATEMENT BY POPULATION GROUP

Participants were asked, on a scale of 1–5, whether they are likely to have a positive opinion of a brand that sponsors or advertises around music, arts, and culture, where 1 = strongly disagree and 5 = fully agree.

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ADVERTISERS OF MUSIC, ARTS AND CULTURE – THOSE WHO FULLY AGREE (POPULATION GROUP) [%] | SPONSORS/ADVERTISERS OF MUSIC | | | | SPONSORS/ADVERTISERS OF ARTS AND CULTURE | | | |
|---|---|---|---|---|---|---|---|---|
| | BLACK | WHITE | COLOURED | INDIAN/ASIAN | BLACK | WHITE | COLOURED | INDIAN/ASIAN |
| Be interested in the brand | 39 | 21 | 23 | 32 | 35 | 15 | 13 | 26 |
| Have a positive opinion of a brand | 44 | 22 | 21 | 36 | 33 | 13 | 12 | 22 |
| Trust a brand that associates itself with the activities in which I am interested | 40 | 19 | 15 | 36 | 29 | 14 | 10 | 12 |
| Buy a product/service from a brand | 37 | 16 | 13 | 22 | 26 | 16 | 7 | 4 |
| Interact with a brand that offers promos/prizes with an event I enjoy | 35 | 25 | 33 | 18 | 31 | 14 | 19 | 8 |
| Interact with a brand that provides content I can access/download/share | 34 | 22 | 32 | 12 | 29 | 13 | 19 | 10 |
| Interact with a brand that provides an App with news, profiles, content | 31 | 21 | 30 | 12 | 22 | 19 | 18 | 8 |

Based on the sample, music sponsorships (advertising) would have a more positive impact on all brand sentiments listed, in comparison to the corresponding arts and culture platform.

| ATTITUDINAL STATEMENT REGARDING SPONSORS/ADVERTISERS OF MUSIC, ARTS AND CULTURE – THOSE WHO FULLY AGREE (GENDER) [%] | SPONSORS/ADVERTISERS OF MUSIC | | SPONSORS/ADVERTISERS OF ARTS AND CULTURE | |
|---|---|---|---|---|
| | MALE | FEMALE | MALE | FEMALE |
| Be interested in the brand | 30 | 26 | 21 | 22 |
| Have a positive opinion of a brand | 29 | 30 | 20 | 20 |
| Trust a brand that associates itself with the activities in which I am interested | 29 | 23 | 18 | 17 |
| Buy a product/service from a brand | 23 | 21 | 15 | 16 |
| Interact with brand that offers promos/ prizes with an event I enjoy | 32 | 27 | 20 | 20 |
| Interact with a brand that provides content I can access/download/share | 30 | 25 | 17 | 22 |
| Interact with a brand that provides an App with news, profiles, content | 28 | 24 | 18 | 20 |

Males are more positive than females when it comes to the impacts from music sponsorships/advertising.

Overall, the impacts on a brand from their association with music is higher than that from arts and culture for both males and females.

# QUANTIFICATION AND SEGMENTATION OF THE MUSIC MARKET

# QUANTIFICATION AND SEGMENTATION OF THE MUSIC MARKET

## TOTAL INTEREST IN MUSIC

### TOTAL INTEREST BY MUSIC GENRE – PERCENTAGE BY GENDER

Total interest includes those who classify themselves as ‘extremely interested’ or ‘somewhat interested’.

Those classified as ‘extremely interested’ are considered regular or passionate followers, whereas those who are ‘somewhat interested’ are more likely to have a casual or passing interest only.

| MUSIC GENRE | MALE [%] | FEMALE [%] | TOTAL [%] |
|---|---|---|---|
| Gospel/religious | 39 | 61 | 100 |
| Rap/hip hop | 60 | 40 | 100 |
| Jazz | 57 | 43 | 100 |
| Kwaito | 58 | 42 | 100 |
| Classical | 49 | 51 | 100 |
| Pop/light rock | 46 | 54 | 100 |
| Dance/rave | 62 | 38 | 100 |
| Reggae | 50 | 50 | 100 |
| Contemporary | 49 | 51 | 100 |
| Country/folk | 51 | 49 | 100 |
| Alternative | 55 | 45 | 100 |
| Rock/heavy metal | 63 | 37 | 100 |

Based on the above table, the most popular music genres have been ranked amongst the total population and by gender.

| RANK | MALE | FEMALE | TOTAL |
|---|---|---|---|
| 1 | Gospel/religious | Gospel/religious | Gospel/religious |
| 2 | Rap/hip hop | Rap/hip hop | Rap/hip hop |
| 3 | Jazz | Jazz | Jazz |
| 4 | Kwaito | Kwaito | Kwaito |
| 5 | Reggae | Classical | Classical |
| 6 | Pop/light rock | Pop/light rock | Pop/light rock |
| 7 | Classical | Dance/rave | Dance/rave |
| 8 | Dance/rave | Reggae | Reggae |
| 9 | Contemporary | Contemporary | Contemporary |
| 10 | Country/folk | Country/folk | Country/folk |

## TOTAL INTEREST BY MUSIC GENRE – PERCENTAGE BY AGE GROUP

| MUSIC GENRE | > 25 YEARS [%] | 25–39 YEARS [%] | 40–49 YEARS [%] | 50+ YEARS [%] | TOTAL [%] |
|---|---|---|---|---|---|
| Gospel/religious | 17% | 28% | 28% | 27% | 100% |
| Rap/hip hop | 31% | 39% | 25% | 6% | 100% |
| Jazz | 15% | 29% | 29% | 28% | 100% |
| Kwaito | 28% | 39% | 24% | 9% | 100% |
| Classical | 11% | 25% | 33% | 31% | 100% |
| Pop/light rock | 20% | 30% | 28% | 24% | 100% |
| Dance/rave | 31% | 34% | 25% | 10% | 100% |
| Reggae | 21% | 34% | 29% | 16% | 100% |
| Contemporary | 20% | 31% | 33% | 16% | 100% |
| Country/folk | 12% | 22% | 30% | 36% | 100% |
| Alternative | 27% | 37% | 27% | 9% | 100% |
| Rock/heavy metal | 23% | 35% | 28% | 14% | 100% |

Based on the above table, the most popular music genres have been ranked by age group.

| RANK | > 25 YEARS | 25–39 YEARS | 40– 49 YEARS | 50+ YEARS |
|---|---|---|---|---|
| 1 | Rap/hip hop | Gospel/religious | Gospel/religious | Gospel/religious |
| 2 | Gospel/religious | Rap/hip hop | Jazz | Jazz |
| 3 | Kwaito | Kwaito | Rap/hip hop | Classical |
| 4 | Dance/rave | Jazz | Classical | Pop/light rock |
| 5 | Jazz | Pop/light rock | Kwaito | Country/folk |
| 6 | Pop/light rock | Dance/rave | Pop/light rock | Reggae |
| 7 | Reggae | Reggae | Reggae | Kwaito |
| 8 | Contemporary | Classical | Dance/rave | Rap/hip hop |
| 9 | Classical | Contemporary | Contemporary | Contemporary |
| 10 | Alternative | Alternative | Country/folk | Dance/rave |

## INTEREST IN LOCAL MUSICIANS – MOST POPULAR MUSICIANS

| MOST POPULAR LOCAL STARS – 2018 | |
|---|---|
| RANK | ADULTS 19+ |
| 1 | AKA |
| 2 | Cassper Nyovest |
| 3 | Steve Hofmeyr |
| 4 | Bobby van Jaarsveld |
| 5 | Black Coffee |
| 6 | Emo Adams |
| 7 | Emtee |
| 8 | Juanita du Plessis |
| 9 | Kurt Darren |
| 10 | Rebecca Malope |

# PASSIONATE INTEREST IN MUSIC

For quantification purposes, we focus mainly on those 'extremely interested', noting that casual interest can however indicate opportunities for future growth for each of the listed arts and cultural segments.

Those who classify themselves as 'extremely interested' and are considered regular or passionate followers can be further quantified as follows.

## PASSIONATE INTEREST BY MUSIC GENRE – NUMBER AND PERCENTAGE BY POPULATION GROUP

| THOSE WHO REGULARLY LISTEN TO/ FOLLOW MUSIC | TOTAL [#] | TOTAL [%] | BLACK [#] | BLACK [%] | WHITE [#] | WHITE [%] | COLOURED [#] | COLOURED [%] | INDIAN/ASIAN [#] | INDIAN/ASIAN [%] |
|---|---|---|---|---|---|---|---|---|---|---|
| Gospel/ religious | 15 241 295 | 100 | 12 007 940 | 79 | 1 114 460 | 7 | 1 591 039 | 10 | 527 856 | 3 |
| Rap/hip hop | 9 582 277 | 100 | 7 315 041 | 76 | 952 160 | 10 | 941 178 | 10 | 373 898 | 4 |
| Jazz | 8 428 946 | 100 | 6 322 548 | 75 | 719 530 | 9 | 1 254 904 | 15 | 131 964 | 2 |
| Kwaito | 7 372 965 | 100 | 6 592 114 | 89 | 243 450 | 3 | 515 407 | 7 | 21 994 | 1 |
| Classical | 5 477 502 | 100 | 3 320 563 | 51 | 1 130 690 | 37 | 784 315 | 7 | 241 934 | 5 |
| Pop/light rock | 5 443 473 | 100 | 2 781 431 | 61 | 2 039 570 | 21 | 358 544 | 14 | 263 928 | 4 |
| Dance/rave | 4 601 053 | 100 | 2 854 949 | 72 | 1 276 760 | 11 | 403 362 | 15 | 65 982 | 2 |
| Reggae | 4 559 626 | 100 | 3 271 551 | 51 | 505 835 | 27 | 672 270 | 16 | 109 970 | 5 |
| Contemporary | 3 358 436 | 100 | 1 727 673 | 35 | 916 995 | **51** | 537 816 | 9 | 175 952 | 5 |
| Country/folk | 3 054 483 | 100 | 1 078 264 | 62 | 1 544 555 | 28 | 268 908 | 9 | 162 756 | 1 |
| Alternative | 2 193 634 | 100 | 1 176 288 | 54 | 816 910 | 37 | 134 454 | 6 | 65 982 | 3 |
| Rock/heavy metal | 2 114 455 | 100 | 1 029 252 | 49 | 819 615 | 39 | 89 636 | 4 | 175 952 | 8 |
| **TOTAL POPULATION** | **71 428 145** | **100** | **49 477 614** | **78** | **12 080 530** | **10** | **7 551 833** | **9** | **2 318 168** | **3** |

Based on the above table, the music genres with the most passionate followers have been ranked by population group.

| RANK | BLACK | WHITE | COLOURED | INDIAN/ASIAN |
|---|---|---|---|---|
| 1 | Gospel/religious | Pop/light rock | Gospel/religious | Gospel/religious |
| 2 | Rap/hip hop | Country/folk | Jazz | Rap/hip hop |
| 3 | Kwaito | Dance/Rave | Rap/hip hop | Pop/light rock |
| 4 | Jazz | Gospel/religious | Classical | Classical |
| 5 | Classical | Classical | Reggae | Contemporary |
| 6 | Reggae | Rap/hip hop | Contemporary | Rock/heavy metal |
| 7 | Dance/rave | Contemporary | Kwaito | Country/folk |
| 8 | Pop/light rock | Alternative | Dance/rave | Jazz |
| 9 | Contemporary | Rock/heavy metal | Pop/light rock | Reggae |
| 10 | Alternative | Jazz | Country/folk | Dance/rave |

## COMPARISON OF PASSIONATE INTEREST IN MUSIC 2013–2019

| THOSE WHO REGULARLY LISTEN TO/FOLLOW MUSIC | TOTAL 2013 [#] | TOTAL 2015 [#] | TOTAL 2017 [#] | TOTAL 2019 [#] |
|---|---|---|---|---|
| Gospel/religious | 16 986 000 | 16 197 000 | 16 297 483 | 15 241 295 |
| Rap/hip hop | 7 752 000 | 8 698 000 | 9 957 678 | 9 582 277 |
| Jazz | 8 773 000 | 9 448 000 | 8 290 728 | 8 428 946 |
| Kwaito | 7 129 000 | 7 739 000 | 8 009 404 | 7 372 965 |
| Classical | 5 277 000 | 5 642 000 | 5 943 293 | 5 477 502 |
| Pop/light rock | 5 484 000 | 5 332 000 | 5 827 874 | 5 443 473 |
| Dance/rave | 3 698 000 | 4 105 000 | 3 994 509 | 4 601 053 |
| Reggae | 4 644 000 | 4 667 000 | 3 778 443 | 3 358 436 |
| Contemporary | 2 746 000 | 3 879 000 | 3 403 408 | 4 559 626 |
| Country/folk | 3 397 000 | 3 356 000 | 3 311 036 | 3 054 483 |
| Alternative | 2 212 000 | 2 510 000 | 1 656 125 | 2 193 634 |
| Rock/heavy metal | 2 262 000 | 2 480 000 | 1 538 435 | 2 114 455 |

# METHODS OF MUSIC CONSUMPTION

Those who indicated that they were somewhat to extremely interested were then asked a series of additional questions to further understand their means of consuming music.

## LISTENING TO MUSIC ON THE INTERNET – PERCENTAGE BY DEMOGRAPHICS

Participants were asked if they listen to music on the Internet.

| LISTENING TO MUSIC ON THE INTERNET | TOTAL [%] | POPULATION GROUP [%] | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WCI | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Yes I listen to music on the Internet | 54 | 60 | 47 | 57 | 52 | 66 | 65 | 41 | 29 |
| No I do not listen | 46 | 40 | 53 | 43 | 48 | 34 | 35 | 59 | 71 |

## AWARENESS OF MUSIC STREAMING SERVICES IN SOUTH AFRICA – PERCENTAGE BY DEMOGRAPHICS

Participants were asked if they are aware of any music streaming services in South Africa.

| AWARENESS OF MUSIC STREAMING SERVICES | TOTAL [%] | POPULATION GROUP [%] | | GENDER [%] | | AGE GROUP [%] | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | BLACK | WCI | MALE | FEMALE | < 25 YEARS | < 35 YEARS | > 35 YEARS | 50+ YEARS |
| Yes I am aware | 48 | 48 | 48 | 50 | 46 | 61 | 58 | 34 | 21 |
| No I am not aware | 52 | 52 | 52 | 50 | 54 | 39 | 42 | 66 | 79 |

## BEST-RATED MUSIC STREAMING SERVICES IN SOUTH AFRICA

Those who claimed to be aware of music streaming services were then asked to name what they felt were the best music streaming services in South Africa.

| MUSIC STREAMING LIST OF SERVICES MENTIONED | | |
|---|---|---|
| **TOP MENTIONS (+10% )** | **OTHER MENTIONS (< 10% )** | **OTHER MENTIONS (< 2% )** |
| YouTube | Sound Cloud | Toxic Wap |
| Google | Tubidy | Waptrick |
| Spotify | MTN Download | Share It |
| Apple/iPhone | MP3 Juice | Opera Mini |
| Joox | MP3 Download | No answer |
| Deezer | Last FM | MP3 Skulls |
| | Amazon | USB |
| | MP3 Tunes | Vodacom App |
| | Cell C Streaming | Samsung App |
| | | Netflix |
| | | PlayStore |
| | | iTunes |

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE BY POPULATION GROUP

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| WAYS TO FOLLOW MUSIC (BLACK POPULATION) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 19 | 72 | 15 | 19 | 46 | 14 | 8 |
| Concerts/events | 22 | 73 | 17 | 21 | 25 | 18 | 14 |
| Awards shows | 5 | 79 | 17 | 20 | 21 | 18 | 16 |
| Reality shows | 5 | 78 | 18 | 21 | 20 | 16 | 17 |
| Songs/new releases | 5 | 64 | 20 | 25 | 34 | 16 | 17 |

| WAYS TO FOLLOW MUSIC (WCI POPULATION) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 13 | 56 | 23 | 16 | 42 | 1 | 3 |
| Concerts/events | 31 | 49 | 9 | 9 | 3 | 1 | 21 |
| Awards shows | 2 | 61 | 1 | 3 | 1 | 1 | 34 |
| Reality shows | 1 | 71 | 2 | 4 | 1 | 1 | 27 |
| Songs/new releases | 1 | 36 | 26 | 12 | 34 | 1 | 19 |

## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE BY AGE GROUP

Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

| WAYS TO FOLLOW MUSIC (POPULATION < 35 YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 15 | 65 | 21 | 20 | 47 | 8 | 6 |
| Concerts/events | 24 | 66 | 17 | 19 | 17 | 11 | 14 |
| Awards shows | 5 | 75 | 12 | 15 | 14 | 11 | 20 |
| Reality shows | 4 | 78 | 14 | 17 | 13 | 10 | 18 |
| Songs/new releases | 4 | 55 | 26 | 23 | 34 | 10 | 14 |

| WAYS TO FOLLOW MUSIC (POPULATION > 35 YEARS) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 18 | 65 | 17 | 15 | 41 | 8 | 6 |
| Concerts/events | 29 | 58 | 10 | 12 | 12 | 10 | 20 |
| Awards shows | 3 | 67 | 8 | 9 | 10 | 9 | 29 |
| Reality shows | 2 | 72 | 7 | 10 | 9 | 8 | 25 |
| Songs/new releases | 3 | 47 | 18 | 15 | 33 | 9 | 22 |

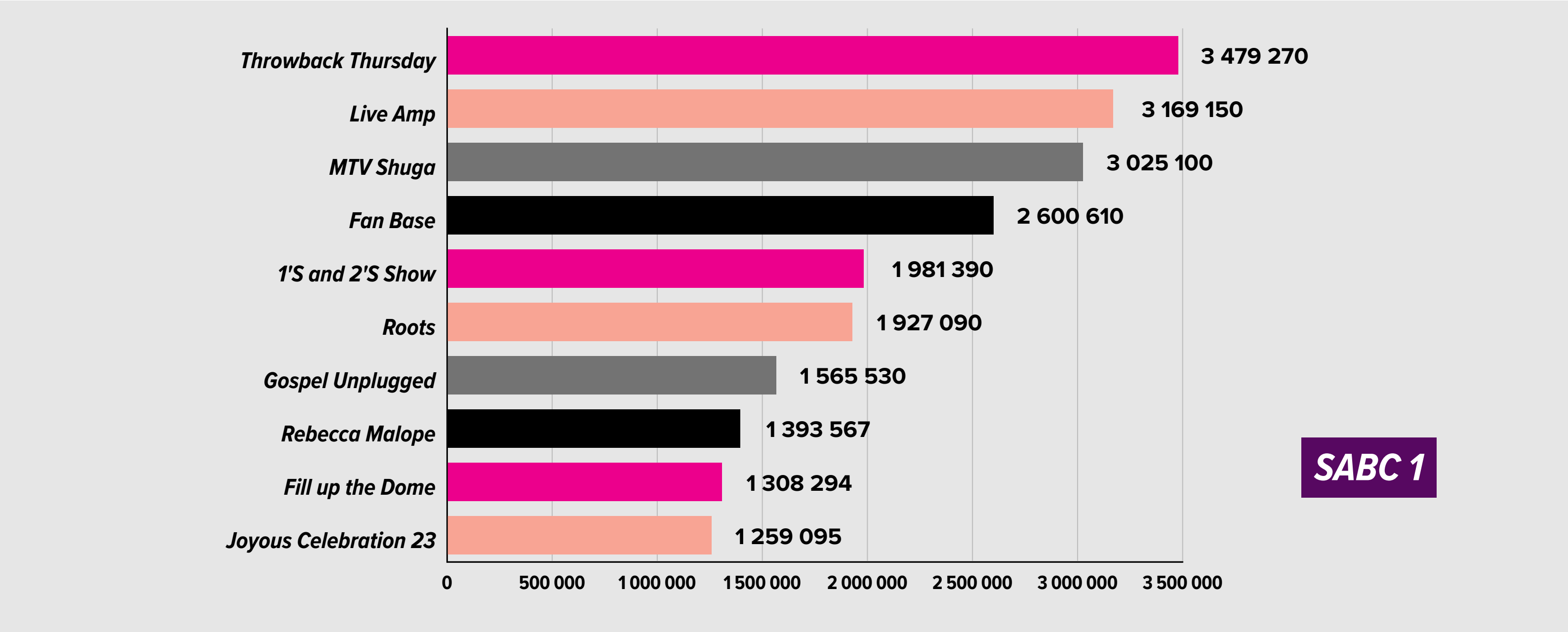
## PREFERRED METHOD USED TO FOLLOW SPECIFIC ACTIVITIES OF INTEREST – PERCENTAGE BY GENDER

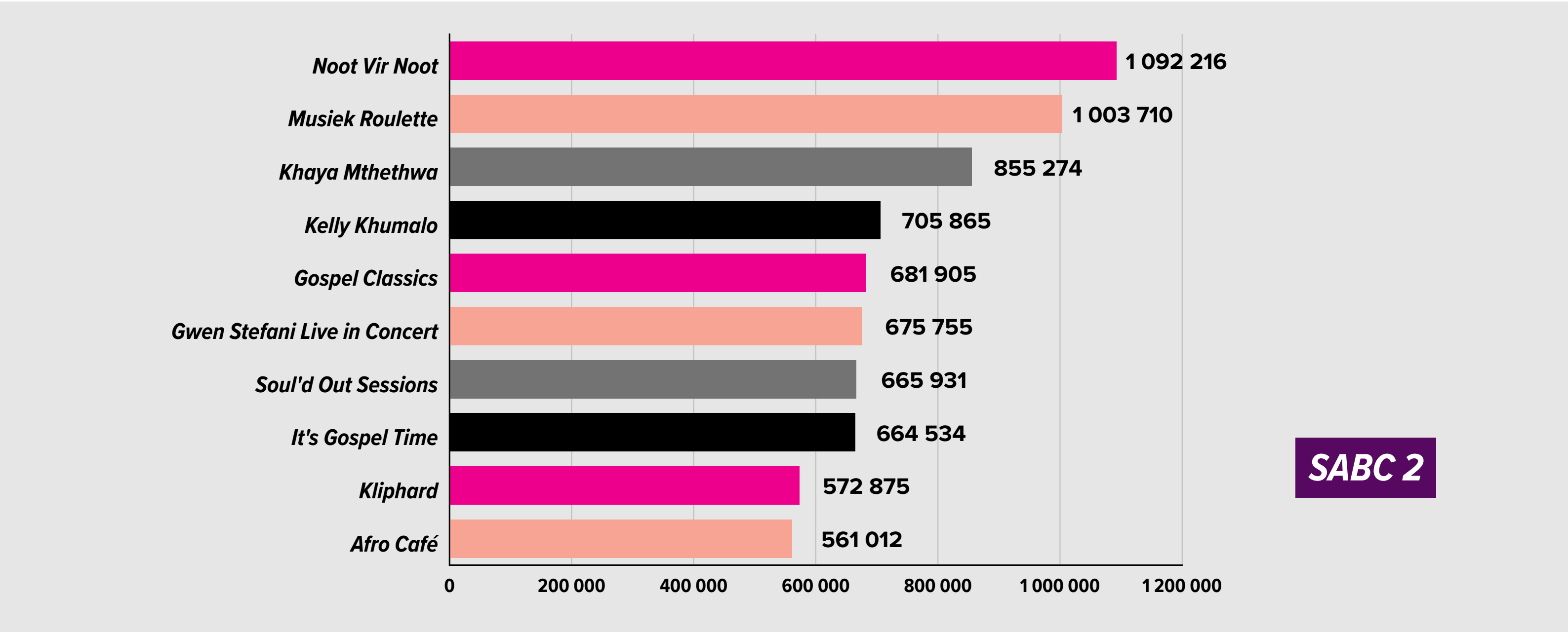
Participants were asked about the different methods they regularly use to follow each of the properties/events listed. Multiple answers per respondent were permitted.

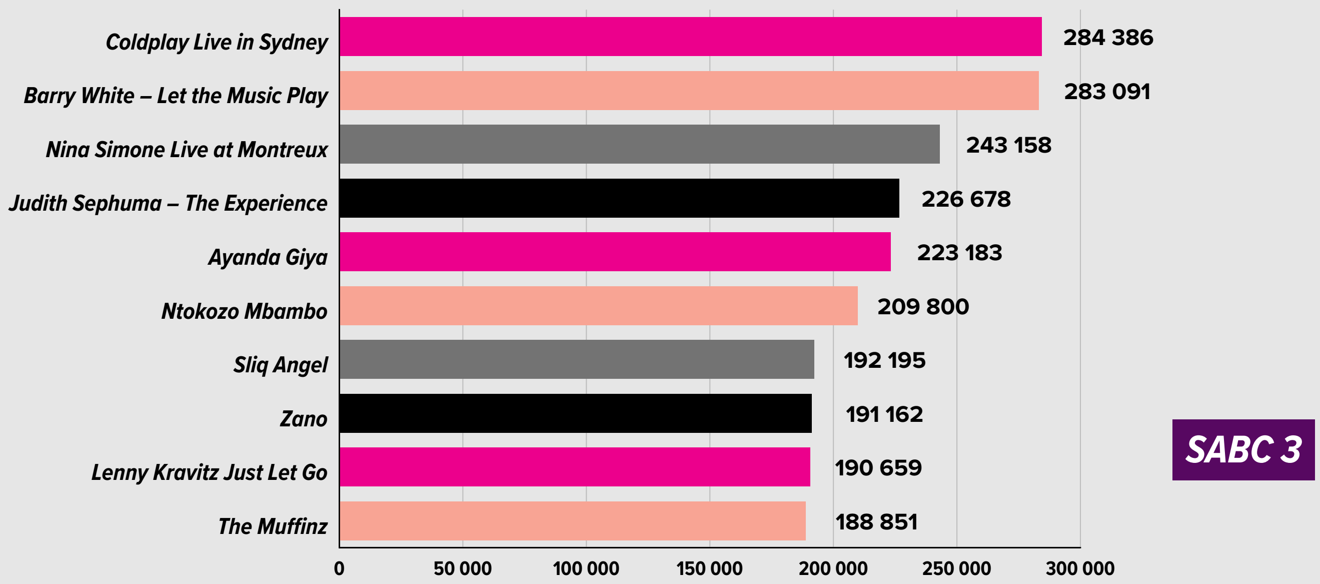
| WAYS TO FOLLOW MUSIC (MALE POPULATION) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 14 | 65 | 21 | 18 | 45 | 8 | 5 |
| Concerts/events | 25 | 63 | 13 | 14 | 16 | 11 | 16 |
| Awards shows | 3 | 68 | 9 | 10 | 10 | 9 | 28 |
| Reality shows | 2 | 73 | 11 | 11 | 10 | 10 | 24 |
| Songs/new releases | 4 | 50 | 24 | 19 | 32 | 9 | 18 |

| WAYS TO FOLLOW MUSIC (FEMALE POPULATION) [%] | ATTEND EVENT | WATCH ON TV | INTERNET/ ONLINE (STREAM) | SOCIAL MEDIA | LISTEN ON RADIO | READ IN PRESS/PRINT MEDIA | DO NOT FOLLOW AT ALL |
|---|---|---|---|---|---|---|---|
| Music in general | 18 | 65 | 17 | 16 | 44 | 8 | 6 |
| Concerts/events | 27 | 62 | 14 | 17 | 14 | 10 | 17 |
| Awards shows | 5 | 75 | 11 | 14 | 14 | 12 | 20 |
| Reality shows | 4 | 78 | 11 | 16 | 13 | 9 | 19 |
| Songs/new releases | 3 | 52 | 20 | 19 | 36 | 10 | 18 |

## AVERAGE ADULT AUDIENCE VIEWERSHIP – NUMBERS FOR SABC DURING 2018




Coldplay Live in Sydney
Barry White – Let the Music Play
Nina Simone Live at Montreux
Judith Sephuma – The Experience
Ayanda Giya
Ntokozo Mbambo
Sliq Angel
Zano
Lenny Kravitz Just Let Go
The Muffinz
284 386
283 091
243 158
226 678
223 183
209 800
192 195
191 162
190 659
188 851
0
50 000
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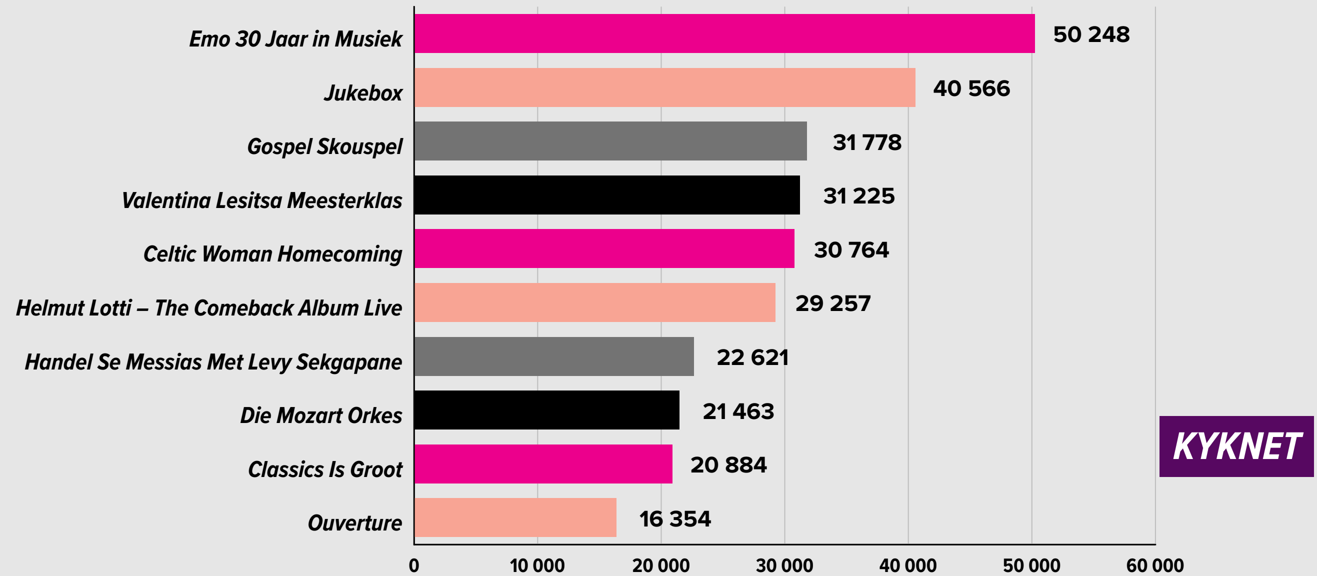
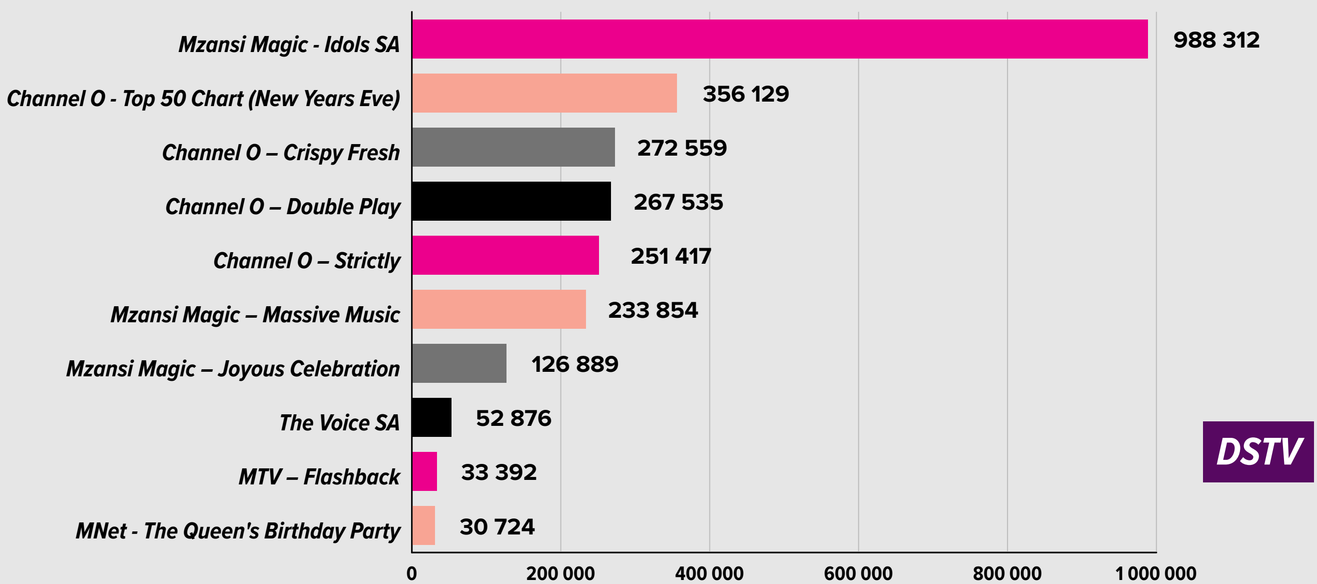
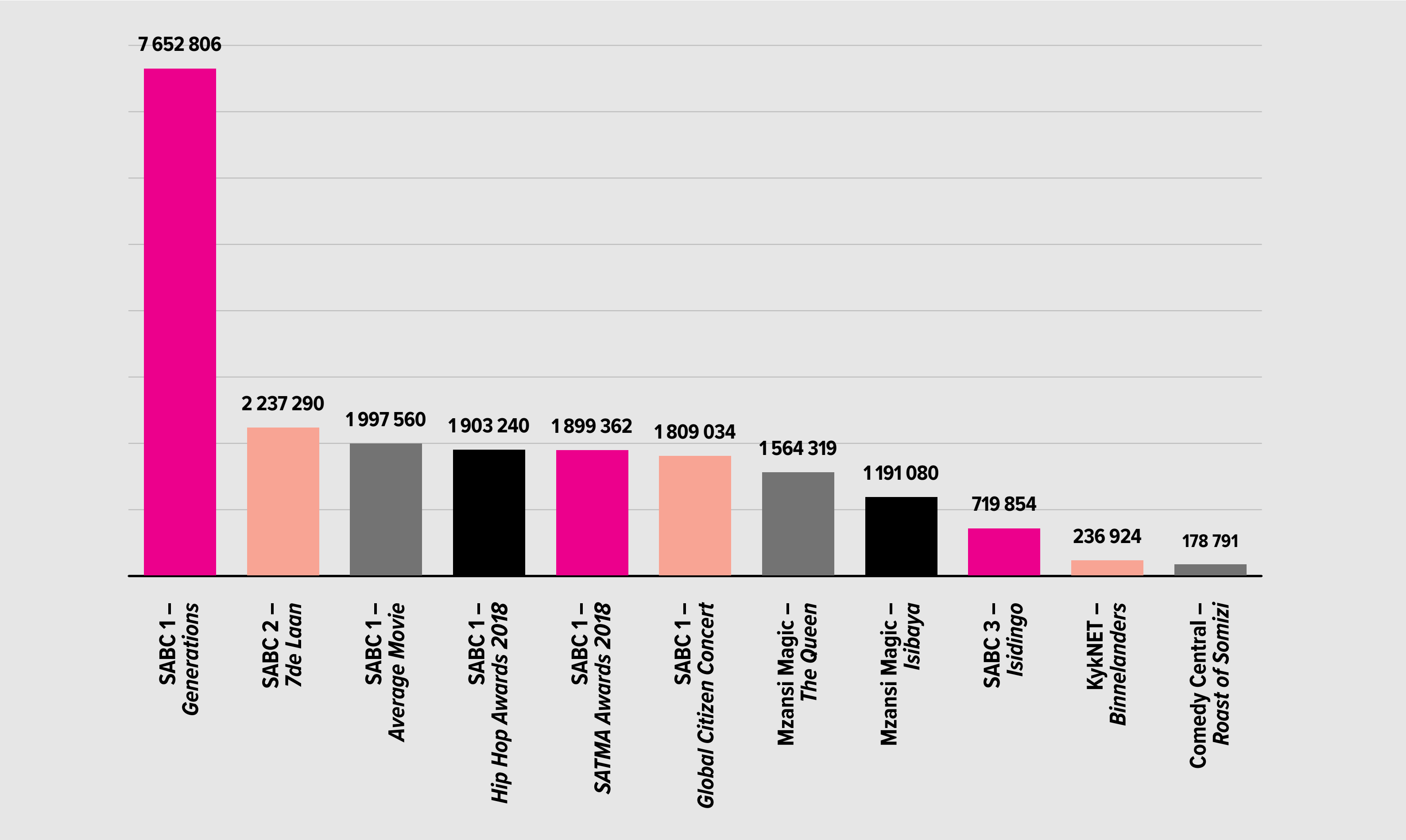
250 000
300 000
SABC 3

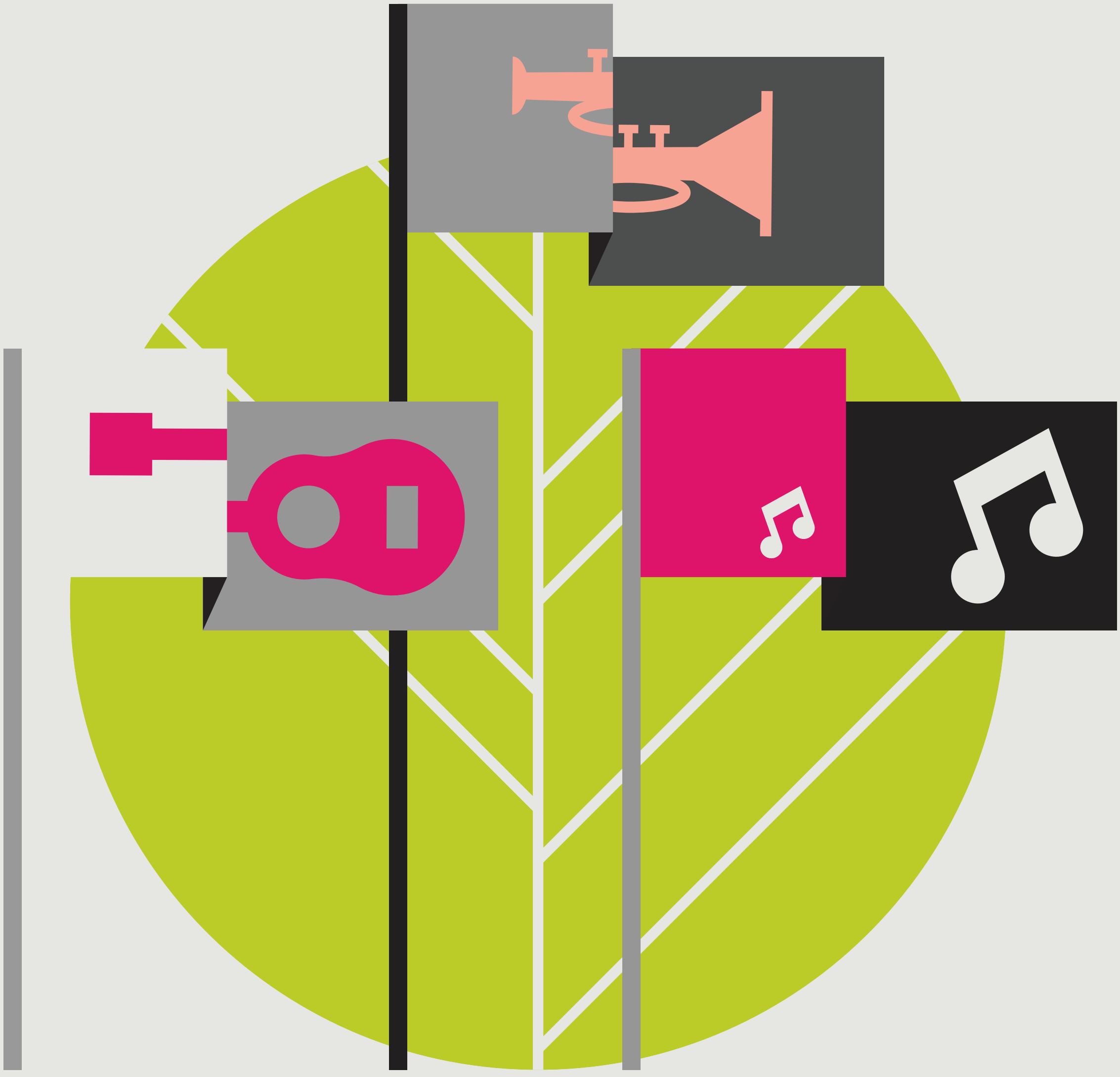
## AVERAGE ADULT AUDIENCE VIEWERSHIP – NUMBERS FOR DSTV DURING 2018



## TOP ARs FOR ARTS AND CULTURAL PROGRAMMES BROADCAST ON TV



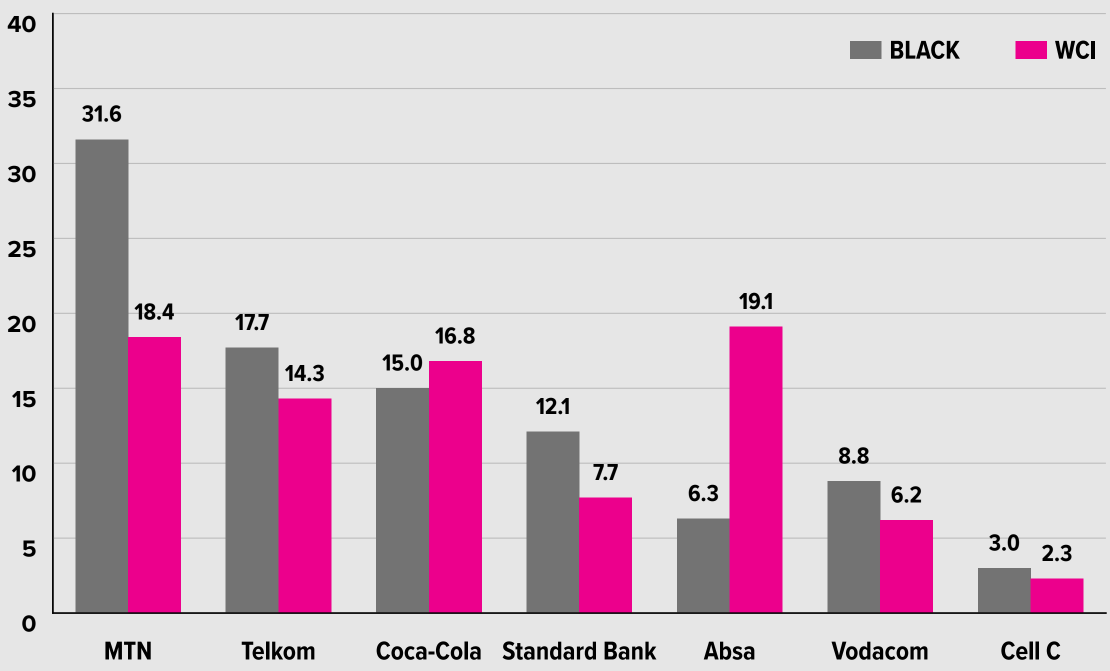


**MUSIC SPONSORSHIP**

# MUSIC SPONSORSHIP

## TOTAL SPONTANEOUS AWARENESS OF MUSIC SPONSORS

Total spontaneous awareness percentage of sponsors of music for the period Nov/Dec 2018.



## SPONTANEOUS AWARENESS OF MUSIC SPONSORS – PERCENTAGE BY BLACK POPULATION

| PERIOD | MTN | TELKOM | COCA-COLA | STD BANK | VODACOM | ABSA | CELL C |
|---|---|---|---|---|---|---|---|
| Jan/Feb 2016 | 25.3 | 16.9 | 15.9 | 3.7 | 7.9 | 3.9 | 1.3 |
| Mar/Apr | 26.8 | 16.4 | 16.1 | 3.4 | 8.0 | 4.0 | 1.5 |
| May/Jun | 27.1 | 16.1 | 15.9 | 3.5 | 7.3 | 4.4 | 1.7 |
| Jul/Aug | 28.7 | 16.8 | 15.5 | 3.8 | 7.9 | 4.9 | 1.7 |
| Sep/Oct | 30.8 | 16.4 | 15.5 | 4.1 | 8.1 | 5.6 | 1.9 |
| Nov/Dec | 30.6 | 17.4 | 15.2 | 4.3 | 8.2 | 5.9 | 2.0 |
| Jan/Feb 2017 | 30.5 | 18.5 | 14.7 | 4.5 | 7.8 | 6.1 | 2.2 |
| Mar/Apr | 31.7 | 18.7 | 14.9 | 4.7 | 7.8 | 6.3 | 2.5 |
| May/Jun | 31.9 | 19.0 | 15.2 | 4.7 | 7.9 | 6.5 | 2.9 |
| Jul/Aug | 31.9 | 19.7 | 15.4 | 5.0 | 8.2 | 6.7 | 2.8 |
| Sep/Oct | 31.7 | 19.8 | 15.3 | 4.7 | 8.8 | 6.9 | 2.7 |
| Nov/Dec | 32.1 | 19.5 | 15.1 | 4.6 | 8.9 | 7.2 | 3.2 |
| Jan/Feb 2018 | 32.5 | 19.8 | 15.0 | 5.0 | 8.8 | 7.0 | 3.3 |
| Mar/Apr | 32.9 | 20.3 | 15.4 | 5.4 | 9.0 | 7.3 | 3.6 |
| May/Jun | 34.9 | 20.9 | 15.1 | 6.2 | 9.7 | 7.5 | 4.0 |
| Jul/Aug | 35.1 | 21.1 | 14.9 | 11.8 | 9.4 | 6.3 | 3.7 |
| Sep/Oct | 35.4 | 22.0 | 15.3 | 13.2 | 9.2 | 7.0 | 3.5 |
| Nov/Dec | 31.6 | 17.7 | 15.0 | 12.1 | 8.8 | 6.3 | 3.0 |

## SPONTANEOUS AWARENESS OF MUSIC SPONSORS – PERCENTAGE BY WHITE, COLOURED, INDIAN/ASIAN POPULATION

| PERIOD | ABSA | MTN | COCA-COLA | TELKOM | STD BANK | VODACOM | CELL C |
|---|---|---|---|---|---|---|---|
| Jan/Feb 2016 | 21.8 | 10.7 | 14.3 | 10.0 | 3.1 | 6.7 | 1.7 |
| Mar/Apr | 22.0 | 11.7 | 14.7 | 9.6 | 2.9 | 6.7 | 1.5 |
| May/Jun | 22.2 | 11.9 | 15.1 | 9.9 | 3.3 | 6.9 | 1.8 |
| Jul/Aug | 22.4 | 13.9 | 15.4 | 11.1 | 3.5 | 6.7 | 1.6 |
| Sep/Oct | 22.9 | 14.9 | 15.8 | 10.8 | 3.8 | 4.5 | 1.9 |
| Nov/Dec | 23.1 | 15.1 | 16.1 | 11.0 | 3.9 | 6.6 | 2.1 |
| Jan/Feb 2017 | 23.5 | 15.6 | 16.3 | 14.8 | 4.0 | 6.4 | 2.0 |
| Mar/Apr | 23.0 | 16.0 | 15.6 | 15.0 | 4.2 | 6.1 | 2.1 |
| May/Jun | 23.3 | 16.2 | 15.5 | 15.2 | 3.9 | 6.4 | 2.2 |
| Jul/Aug | 23.8 | 16.5 | 15.2 | 15.8 | 3.8 | 6.5 | 2.3 |
| Sep/Oct | 24.1 | 17.0 | 15.2 | 15.9 | 4.1 | 6.8 | 2.2 |
| Nov/Dec | 23.7 | 17.4 | 15.4 | 16.1 | 4.2 | 6.7 | 2.0 |
| Jan/Feb 2018 | 23.2 | 17.4 | 15.5 | 16.0 | 4.6 | 6.7 | 2.3 |
| Mar/Apr | 22.8 | 17.9 | 15.7 | 15.9 | 4.9 | 6.5 | 2.0 |
| May/Jun | 22.1 | 18.4 | 16.6 | 15.0 | 5.1 | 6.7 | 2.8 |
| Jul/Aug | 20.4 | 18.0 | 16.9 | 15.1 | 6.9 | 6.5 | 2.3 |
| Sep/Oct | 19.0 | 18.9 | 17.9 | 14.7 | 8.0 | 6.8 | 2.5 |
| Nov/Dec | 19.1 | 18.4 | 16.8 | 14.3 | 7.7 | 6.2 | 2.3 |

# PERCENTAGE OF SPONTANEOUS AWARENESS OF SPONSORS SUPPORTING SPECIFIC MUSIC EVENTS BY POPULATION GROUP

| SPONTANEOUS AWARENESS PERCENTAGE – SPONSORS OF MUSIC EVENTS | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **EVENT** | ***JOYOUS CELEBRATION*** **MTN** | | ***AFRIKAANS IS GROOT*** **MTN** | | ***SA IDOLS*** **TELKOM** | | ***JOY OF JAZZ*** **STANDARD BANK** | | ***NATIONAL CHOIR FESTIVAL*** **OLD MUTUAL** | |
| | BLACK [%] | WCI [%] | BLACK [%] | WCI [%] | BLACK [%] | WCI [%] | BLACK [%] | WCI [%] | BLACK [%] | WCI [%] |
| Jan/Feb 2018 | 30.3 | 2.3 | 1.1 | 3.6 | 30.9 | 29.0 | 5.6 | 4.2 | 4.1 | 2.5 |
| Mar/Apr | 31.1 | 2.8 | 1.6 | 4.0 | 31.4 | 28.9 | 6.0 | 4.6 | 4.9 | 2.9 |
| May/Jun | 32.1 | 3.4 | 0.9 | 3.0 | 31.1 | 27.0 | 6.4 | 6.5 | 6.0 | 3.7 |
| Jul/Aug | 32.2 | 3.0 | 0.7 | 1.8 | 32.8 | 26.5 | 10.7 | 6.9 | 5.6 | 3.1 |
| Sep/Oct | 32.9 | 3.4 | 0.1 | 0.6 | 34.9 | 26.0 | 13.8 | 8.4 | 5.4 | 2.7 |
| Nov/Dec | 33.3 | 3.6 | - | - | 35.2 | 24.8 | 13.9 | 8.8 | 4.9 | 2.4 |

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