DISCUSSION PAPER 2:

PERFORMANCE AND CELEBRATIONS SECTOR (Performing Arts, Theatre, Music, Dance, Festivals, Rituals, Events, Days of Commemorations, Orchestra, Story-telling)

Festivals, rituals and events as a subset of Performance and Celebration one of the key areas requiring appropriate support.

Cultural Events = The celebration, showcasing, discussion or analysis of culture and heritage including festivals, exhibitions, carnivals, ceremonies, commemorations, conventions, conferences, congresses, performing art productions, exhibitions, seminars, imbizos, indabas, lekgotlas, sessions, launches and symposiums.

Events = A celebration, activity, intervention or display or scheduled series of celebrations, activities, interventions or displays, of an artistic, cultural, traditional, educational, commemorative, exhibitive, entertainment, creative, commercial nature, or similar activities, that are staged for the public or target-specific audiences and that are hosted at a temporary or permanent venue, location, along a route or within a precinct or combination thereof.

The majority of Performance and Celebration CCIs are owned by Africans, Coloured or Indian people, especially in the case of Festivals and Events. More than half of performing arts CCIs have at least one-woman owner. Most owners are South African citizens and are generally young, especially in Festivals and Events and Performing Arts. A minority of organisations are a member of a professional body:

- create the conditions for culture, heritage and creative excellence to flourish
- value and nurture our arts, culture and heritage
- support the development and growth of our creative industries
- support the successful delivery of major cultural and sporting events
- support, sustain and develop the events industry

There is a need for development of new performance and event specific venues in order to meet growing demand by audiences and organizers – especially post-Covid-19!

There is a substantial need to install infrastructure common to all events in the venues that have the highest event use annually and in any future outdoor performance and event venues to be developed.

a) Festivals b) Cultural performances (music, theatre, dance and other cultural events); c) Event productions (concerts, sporting, corporate, environmental, or other events); d) Civic gatherings and celebrations; e) Wellness Programme such as artists' races, walks, cycling and other events, and f) Day-to-day reoccurring passive or un-programmed use such as casual walking, sitting, socializing and recreation.

The **Dance** and **Musical Theatre** sector includes performers in a wide variety of genres and styles. Most performers in the Dance and Musical Theatre sector perform under a contractual relationship without a direct employer, with contracts ranging widely in length and terms. Performers of dance are a highly urbanised group and are also increasingly reliant on multifaceted income streams. The Dance and Musical Theatre sector includes dance teaching. Dance teachers tend to instruct school age students, and are less geographically clustered than performers, with more presence in regional areas (most are running community gym clubs). Most Dance Teachers either own their own business or are employed by a small business, though dance teaching positions also exist in larger organisations.

The performing arts, such as dance and musical theatre, are reliant on ticket sales, audiences and the physical location of the theatre or venue, and as such are one of the sectors most heavily impacted by the COVID-19 pandemic. Performing arts organisations have had to quickly digitize their offerings, which required specialist digital production skills.

Many dance providers have chosen to move their classes online due to COVID-19 and the changed circumstances in studios, schools and communities.

Industry see potential to reach new audiences through evolving technologies such as virtual reality, which will allow remote audiences to be more fully immersed in live performances. Opportunities for technicians working in dance and musical theatre to extend their skills and knowledge in the areas of virtual and augmented reality technologies and special effects could improve their employability and bolster sector capacity to reach new markets.

Creative workers within the Dance and Musical Theatre sector have been presented with new opportunities and as a result of this changing technology, relevant training is required to ensure creatives have the necessary skills for these technological advancements.

Probable key drivers for change in this sector, includes:

- An increasing reliance on multifaceted income streams for those in the sector. This means those working in Dance and Musical Theatre need more general business skills such as record-keeping, invoicing and marketing, as well as resilience and self-care to operate most effectively in the sector.
- Some graduates lack basic industry knowledge, including interactions between associations, the nature of working arrangements and the scope of employment opportunities. This knowledge is often gained through informal upskilling on

the job. Creative graduates need their training to include the general operation of the sector.

- A misalignment of qualification titles and stream names, with the wider sector's perception of skills related to the qualification. Some tertiary qualification titles could therefore be renamed to better manage expectations of graduates to make them relevant to the sector.
- Relatively high variance in skill and knowledge levels amongst dance and dance teaching graduates. This may be caused by an overly broad range of possible subjects included in the qualifications.
- Increasing digitisation of equipment and sector-related technology. This has changed how performers attract and retain audiences, generate profit and analyse occupation-specific data. Training needs to provide creatives with digital skills to take advantage of these trends.

Opera and musical theatre would include foreign and local operas, and foreign musicals such as Cats, Chicago and Phantom of the Opera and past local musicals such as Sophiatown, African Footprint, Sarafina and District Six: the musical. These are generally large-scale in nature, employing upwards of ten people on stage and up to 100 in operas requiring large-scale choruses. They are generally expensive to stage. The sector would include training in opera and music theatre, design (sets, posters, programmes, costumes, etc), ticketing, support and technical services, as well as accommodation, catering, transport, etc for out-of-town performers.

The most popular form of performing arts entertainment for local audiences at the moment is musicals. When people travel abroad, generally, they make a point of seeing one of the big musicals. South African investment in musicals locally could become a tourist phenomenon too. With the option to see a particular musical either in Durban, Gauteng or the Western Cape, the potential for internal tourism is good and packages are created for people to fly to Durban for a weekend, to stay in a hotel, see the show and have a rental car as part of the package.

Essentially South African performing arts exports – and that have done very well both critically and in terms of generating income for the performers and producers. There is an international market for South African musicals and other performing arts products. The nature of these exports is different to other products in that it is labour-intensive, it centres around live performance rather than something purchased in a retail outlet, and it is able to go back again and again within a few years. It is also possible to tour with multiple casts (as UMOJA once did).

Also related is theatre - this sub-sector includes performers and directors of contemporary drama, classical theatre, stand-up comedy, pantomimes, political satire and cabaret, theatres, costume-makers, set builders, accommodation for out-of-town performers, music, sound and lighting technicians, design (posters, programmes, etc), newspaper advertising, catering and restaurants. The theatre industry is, in many ways, a largely untapped industry in terms of the potential that it has.

Given the numbers of international tourists and the fact that many of them come from countries with great theatre traditions and who are probably aware of South African theatre, there is potentially a huge market for contemporary theatre for the tourist market. However, they need to know about it, and be informed beforehand, yet the nature of funding means that theatres cannot plan as far ahead as the tourist market requires. There is a need for at least one or two theatres in Durban to be subsidized so that it can offer ten good quality South African productions a year for the tourist market, and be able to market it sufficiently. There are local markets in the province that are largely untapped because of a lack of funding or infrastructural support to tour plays there –including touring community arts centres!

Community events and festivals can make a significant contribution for rural development with strategic planning, well-defined goals, local level partnerships and funding.

What is a Festival?

A festival can be defined as ―A series of performances of music, plays, films/movies, etc., usually organized in the same place once a year; a series of public events connected with a particular activity or idea.

Definition of Events

The term "event" is used to describe a wide range of activities many of which have quite different characteristics. Such events range from the Olympic Games at the mega-event end of the scale to small regional festivals. An event can be defined as "*a onetime or infrequently occurring event of limited duration that provides the consumer with a leisure and social opportunity beyond everyday experience*".

Events vary from local community based events.

The nature of events can also differ due to the number of venues used during the event. Events can be all inclusive at one venue or held at many venues throughout a region.

Events industry by type include music concerts, festivals, exhibitions, conferences, concerts, corporate events, seminars, etc.

Revenue Source includes ticket sales, sponsorship and others.

Organisers could be entertainment sector, education, corporate, sporting, etc.

Events refer to public gathering of populace arts at a determined time and place. The purpose for staging an event can be increase in business profitability, celebratory, entertainment, and community causes among others. The most popular events include conference & exhibition, corporate events & seminars, promotion & fundraising, music & art performance, sports, festival, trade shows, and product launch. The key stakeholders within the events market are corporate organizations, public organizations, festival organisers & NGOs.

The initial stage of a major event involves understanding the audience and their behavior that excites and emotionally engages them. The final stage involves conducting events, such as music concerts, sports, exhibitions & conferences, seminars, and others, appropriately. It has been witnessed that events such as music concerts attract majority of the population, especially the youth and middle-aged individuals, which boost the growth of the events industry size.

Some events relate to days of commemoration like Battle of Isandlwana in January, uMkhosi wamaganu, Bhambatha Rebellion etc. What are possible opportunities throughout KZN regions that could benefit the arts industry?

Key Market Segments

- **By Type**
  - Music Concert
  - Festivals
  - Sports
  - Exhibitions and Conferences
  - Corporate Events and Seminars
  - Commemoration
  - Storytelling
  - Performing Arts (dance, music, theatre)
  - Others
- **By Revenue Source**
  - Ticket Sale
  - Sponsorship
  - Others
- **By Organizer**
  - Corporate
  - Sports
  - Education
  - Entertainment bodies
  - Community Arts Centres
  - Others
- **By Age Group**
  - Below 20 Years
  - 21-40 Years
  - Above 40 Years

Festivals and special events are known to play important roles in destination development as attractions, image makers, animators of static attractions, and catalysts for other developments.

Music:

The **Music** sector section is characterized by a variety of occupations, with most workers self-employed, working as contractors or employed in small businesses. Private music teaching is responsible for the largest proportion of employment within the sector, with performance or recording-based occupations making up for the rest of proportion of employment. New technologies are currently creating new opportunities for music performers and others working in this industry.

This sector would include musicians in orchestras, bands and solo musicians, music education (both private and public), live music events, retail outlets for music instruments, technicians, sound and lighting service providers, music composition, recording studios, music stores, music videos, radio broadcasts of music, DJs and nightclubs, music agents, event managers, etc.

Nationally, the music industry has grown to such an extent that it is worth more than R1 billion, the 22nd largest in the world, and employs more than 20 000 people. More than a third of the music bought by South Africans is generated in South Africa. South African music is being exported to at least 26 countries in Africa. The world music industry has six dominant multinationals with subsidiaries in most of the world's major music markets. Of these six companies, i.e. GALLO, Universal, BMG, EMI, Polygram and Sony, have subsidiaries in Johannesburg where much of the music industry is based.

Currently the music industry is highly centralised in Gauteng and the major recording studios and record companies are all situated within a thirty-kilometre radius of one another. The head offices of all of the majors are clustered around Johannesburg. KZN Music House is non-functional!

The South African music industry is a vibrant and growing sector of the economy and grew in value by 70.7% and making it the 23rd fastest growing music market in the world. The gross turnover of the South African industry in 1996 was approximately R900 million (today amounting to over R2 billion). Industry experts estimated that the industry is worth around R2 billion and employs approximately over 12 000 people. The commercial sector of the industry is well organised and is characterised by a range of multinational and independent record companies; significant recording and manufacturing capabilities; an extensive retail and broadcast network for the collection of copyright revenues and strong professional organisations.

Dominating the world music industry are five multinational companies, four of which have South African subsidiaries. This presence provides a network through which South African music can be sold although there are considerable barriers to entry into foreign territories for artists. Reducing these barriers is vital for export success. Networks of managers, promoters and companies that are ambassadors and champions of South African music need to be established to spearhead new markets for our products.

The industry does face a number of challenges such as:

- the limited finances available for investment in the development and promotion of South African artists;
- rampant piracy and the lack of its control;
- racialised music consumption due to the limited disposable incomes of different racial groups;
- conflict over the distribution of royalties;
- the concentration of the industry mainly in Gauteng even though the 'raw material' is drawn from all over South Africa; and
- a lack of integration between the live music venues and other activities such as tourism and the hospitality industries

Technological disruption is expected to have to impact: the way workers collaborate and produce art and services; the way art and expertise is sold, including self-promotion to employers and consumers; and the demand for skills of creativity and design.

Opportunities for performers to work have been severely diminished during COVID-19 owing to restrictions on gatherings. Creative artists, and in particular live audience-based performers, have been profoundly impacted by quarantine measures undertaken. Sectors and workers affected include live music venues, bands, booking agents, opera, and music festivals. Live touring is by far the most lucrative income stream for contemporary music artists. Therefore, the ongoing nature of the COVID-19 crisis globally is having a magnified impact on the professional contemporary music sector, who are unable to tour their performances currently, or forward plan to tour in the coming financial year!

Under lockdown musicians focused mostly in writing music about the crisis, collaborating over social media, rediscovering old music together, public service announcements (using music to reinforce local and national governments' safety messaging), and livestreams for venues.

For music, following are a number of key drivers for change within the music industry and related vocational training. These include:

- A current inadequacy of training which fully prepares musicians for a career in the Music industry
- A need for qualifications to better reflect the new technologies and related opportunities in the sector, as well as to impart specialised technical skills to enable learners to stand out
- The importance of equipping those in the sector with relevant freelancing, self-publishing and collaborative skills, including the use of data analysis in either a freelance or more traditional working environment
- An unmet demand for songwriters existing in the sector, with a lack of relevant skills covered by existing vocational training.

The closure of music distribution outlets like MUSICA should be providing an entrepreneurship opportunity for creatives – as there is still a huge market for CDs and DVDs despite technology drive! An example is the revival of vinyl products – popular with DJs!

Digital distribution of music presents both opportunities and challenges for musicians, providing opportunities for SA music to access new markets while at the same time forcing them to compete in a global marketplace – therefore coming up with serious demand for producing quality music! (A challenge in the absence or lack of professional music composers for SA).

Due to the smaller nature of live production teams, workers involved in the technical side of live production are required to perform a wide variety of tasks and are in need of more generalist training. The necessary specialist skills are therefore developed on the job or as part of continuing training once a worker is employed. (This differs from a sector such as Screen and Media in which technical workers are more specialized).

Copyright - the importance of protecting content:

Increasingly the revenue of the cultural industries is not derived from the sale of commodities but from the sale of intellectual property. For example, the songs of the soundtrack from the blockbuster motion picture 'Titanic' derive revenue from the public performance of the 'Titanic' through public performance royalties. The same songs are also sold in compact disk form and constitute another revenue stream known as mechanical royalties. Yet again a song from that soundtrack may be altered for use in an advertisement jingle and given to synchronisation royalties. And from there extend an almost infinite number of applications for the songs of the 'Titanic' soundtrack. In each instance the intellectual property right remains the intangible yet incontrovertible source of profit for the cultural industries. Thus it is important that this property is protected, for without it a fundamental source of the Cultural Industries revenue would be lost.

Protecting creativity through Intellectual Property Rights (IPRs)

1. *Copyright for author of original works*

- Books, music, paintings, plays, architecture, dance, software, etc.
- Prevent others from copying, communicating to the public (Internet), distributing

2. *"Related rights" for intermediaries that make works available to an audience*

- Performers (actors, musicians)
- Producers of phonograms (record labels)
- Broadcasting organizations

3. *IPRs protect creativity through reputation*

- Trademarks designate origin (producer)
- Certification marks confirm production standards, e.g. textile production label "Green Button" by Government of Germany
- Geographical indications (GIs) refer to origin of product and links origin to quality, reputation or other characteristic, Wines, cheeses, coffee, carpets, handicrafts

4. *IPRs protect creativity in appearance*

- Industrial designs: outer appearance of a product, not its technical function
- Textile patterns, design of clothes, shapes of smart phones and other devices, ornamental elements of architecture, etc.
- Technical functioning protected by patents or utility models

Developing countries like SA do not have **sufficiently** strong legal and administrative mechanisms by which enforcement, the collection and distribution of royalties, can take place systematically. These constraints do not only exist in terms of legal and regulatory frameworks but also in the capacity to implement them. A key challenge emanates from the fact that the creative economy is increasing its reliance on digital technologies. Electronic platforms, file sharing and music streaming, among others, have led to new business models. The big challenge is how to apply the IP system to the digital context. These are remarkable key issues that needs CCIFSA attention!

Performers Protection Amendment Bill is still under wraps since 2016!

FOR DISCUSSION:

What key performance and celebration events possible in each of the KZN regions to yield job creation for the creatives in a sustainable manner?

Is the industry see potential to reach new audiences through evolving technologies such as virtual reality, which will allow remote audiences to be more fully immersed in live performances?

What other avenues for music distribution?

Is our music section providing the industry with adequate Live Production Services for occupations such as Lighting and Sound Technician or Stage Manager?

With the Playhouse as the only main prime theatre venue in the province, how should creatives (performing artists) benefit with a practical working relationship that is friendly and welcoming? (eg. Commissioning of quality productions that reflect our province, etc.?)

*(**Australian Jobs 2021** found that new ways of working, such as online video conferencing, live streaming or video on demand could create long term changes to the way organisations in this industry operate).*