Assessing video gaming events in South Africa: A supply and demand perspective

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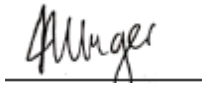
Declaration with regard to independent work

I, Zacharias Johannes Bosch, identity number 9007095011082 and student number 21750882 hereby declare that this research submitted to the North-West University, for the PhD study: ***Assessing video gaming events in South Africa: A supply and demand perspective***, is my own independent work; and complier with the Code of Academic Integrity, as well as other relevant policies, procedures, rules and regulations of the North West University; and has not been submitted before to any institution by myself or any other person in fulfilment of the requirements for the attainment of any qualification.

Zacharias Johannes Bosch



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Personal journey and acknowledgements

My passion for video games mostly started during my Masters year of post-graduate studies. I did play video games in the past but it was during this period that I bought several PlayStation 3 games without owning the console yet. While saving money to buy the console, I started researching the games I bought and was fascinated by the many areas of development and the time, money, talent and resources that go into creating video games. I further investigated the video gaming industry by reading various gaming articles and started following several gaming news outlets covering video gaming developments and comparative analyses. The concept of including video games in future studies started to stuck with me because it was one of the few hobbies I took time to read about.

By the completion of my Masters, I first proposed the idea of researching virtual reality gaming as an alternative form of tourism in a PhD study. The idea was to survey visitors to video gaming events and get their perspectives on virtual reality. Unfortunately, I could not present a solid problem for investigating this field and it would have taken my research in direction very unfamiliar to all involved. Therefore, it was suggested that I focus more on the creative industry and the event-side of video games. While connecting these areas I found that little research has been done on video gaming events across the world and especially in South Africa. As an industry that has so much creative potential and one that could have economic and technological impacts, I was baffled to find that there was a severe lack of support and understanding of video games and video gaming events in South Africa. This encouraged me to focus the study on developing video gaming events. It was clear to me that by developing video gaming events, more people would be exposed to this wonderful, artistic and underappreciated industry.

The new focus of my research led to the development of the title registered for this study. From there I started working on the literature chapters too which I must admit was very exhausting as it covers a great deal of literature. In 2016, I presented the concept of my study to the organisers of the rAge Expo in Johannesburg and got their permission to conduct my survey at the event. After the survey was completed, I presented a report of the results to the organisers. The report provided me with pride, as it was the first true valuable contribution of the study. The next step was to conduct the visitor survey at the rAge Expo in Cape Town the following year but the event, unfortunately, was cancelled. This was after I already booked flight tickets and accommodation in Cape Town. It still went to Cape Town and made a little holiday from it.

In 2017 I presented and published an article at the International Student Conference in Tourism Research (ISCONTOUR), Salzburg, Austria, focussing on the demand-side aspects of my results. At this conference, I got constructive feedback that I incorporated in the study. During the first three years of my PhD study, I was also a part-time employee at the Tourism Research in Economics, Environs and Society (TREES) as a senior research assistant and was involved in an EU-funded project called Green Bubbles RISE that took me to Holland and Italy. Juggling all these activities were very challenging and I had to register my study for a 4th year. During this year (2018) I solely focused on completing the study and commenced the organiser interviews. This phase was a little more challenging than the visitor survey since I had to do the interviews on a time and date that suited each organiser - many of whom were very busy. Fortunately, I got more than enough feedback from the organisers. Bringing it all together in the final chapter of this study was a rewarding feeling since it was exciting to see how everything fitted.

In the end I had sufficient time to complete all the objectives of the PhD thesis and was very glad with my progress and the end result. It was a long but worthwhile journey and one that would not have existed if not for the support of so many individuals. I want to thank the following the following individuals that have played an important role in the completion of this thesis:

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Abstract

The video gaming industry is one of the largest and fastest growing entertainment industries in the world. The video gaming industry is also recognised as a core or peripheral creative industry in many popular creative-industry models. Creative industries are utilised by the tourism industry to stimulate creative tourism. Included in creative-tourism activities are creative events. As a creative event, video gaming exhibitions/events not only play a key role in supporting and exposing various video gaming sectors but also in growing creative tourism and the creative industries. Unfortunately, little to no research has been conducted on video gaming events, not to mention the video gaming industry in South Africa. As a result, entry and investment for these events are severely restricted. To make matters worse, many of the country's creative industry models and policies do not recognise the video game industry as being part of the creative industries, limiting government support.

The aim of this study was; therefore, to assess video gaming events in South Africa from a supply- and demand-side perspective. Through this assessment, this research adds to the knowledge base regarding the development and expansion of video gaming as part of creative industries. The aim of the study was realised by setting and investigating six objectives. The first three objectives were achieved through literature analyses of the creative industries, exhibition management and events, and the video gaming industry respectively. The fourth aim was achieved by conducting a destination-based visitor survey at the 2016 rAge Expo in Johannesburg - Africa's largest technology and video gaming exhibition (demand-side assessment). A total of 420 completed questionnaires were collected and analysed through SPSS software (Version 25). Thereafter, three exploratory factor analyses were conducted. First, on the motives for playing video games, which identified the factors: *recreational escapism, social cohesion and competitiveness*, *mental and creative exploration, role-playing*, and *self-development and expression.* Second, on the motives for attending video gaming events, which were: *social gaming development*, *following gaming developments*, *gaming purchases*, and *gaming promotions and competitions.* Third, on the evaluation of expo related aspects, which included the factors: *general organisation*, *venue management*, *quality and variety of content*, and *affordability.* Market segmentation was then applied to identify different markets based on the motives for playing video games (*Hard-core gamers*, *Intermediate gamers* and *Casual gamers*) and the motives for attending video gaming events/rAge (*Enthusiast*, *Socialisers*, *Trend seekers* and *Casual attendees*). By means of a series of multivariate statistical analyses (ANOVA, Tukey's $B_{a,b}$ Post hoc tests, Cohen's *d* values and cross-tabulations) the markets were compared to identify any differences/similarities between them. Statistically significant differences between the market segments revealed that the video gaming market cannot be

regarded as homogeneous, emphasising the necessity of applying market segmentation. Based on the differences, practical guidelines were provided aimed at organisers on how to attract, retain and expand the different market segments.

The fifth aim was achieved by conducting telephone interviews with eight video gaming event organisers (supply-side assessment) during the months of March and May 2018. The conversations were recorded and transcribed. Thereafter, by means of a case study approach, several themes were identified. The themes were listed and discussed under the categories: factors for selecting a venue (five themes), main objectives for organising video gaming events (five themes), how to deal with changing market trends (five themes), critical success factors for hosting video gaming events (eight themes), and the state of video gaming events in South Africa (six themes). A comparison with previous event supply-side literature revealed similarities and differences in theme quantity and arrangement, while several distinct themes were identified for video gaming events. Based on these findings, it is evident that not all events share the same success factors or objectives or have the same set of opportunities or challenges, emphasising the necessity for conducting supply-side research of this nature. The supply-side assessment revealed valuable insights regarding the event management approach in a video gaming event-planning context.

The sixth aim was achieved by drawing conclusions and making recommendations regarding an assessment of video gaming events in South Africa from a supply and demand perspective. Firstly, the demand-side (quantitative) results were compared with the supply-side (qualitative) results, revealing differences/similarities to why visitors attend video gaming events compared to the critical success factors and the main objectives for hosting it. Through this comparison, an assessment was developed aimed at academics and researchers, with regard to future research, on how supply and demand-side aspects are linked in providing memorable and satisfying visitor experiences at video gaming events. Secondly, a proposed practical framework for expanding video gaming exhibitions as part of the creative industries in South Africa was developed as a guideline for industry decision-makers to support and expand video gaming exhibitions/events. The application of the framework might foster knowledge creation vital to the expansion of video gaming exhibitions/events, as part of creative tourism, thereby growing the video gaming industry as part of the creative industries in South Africa. Ultimately, this framework advocates the necessity to recognise video games as part of the country's creative-industry sectors. In achieving the study objectives, the assessment and proposed framework make a valuable practical contribution, while several literature contributions are achieved that fill the gaps in the current exhibition/events, video-game and creative-industry literature.

Keywords: assessment, video gaming events, video game industry, creative industries, creative tourism, event management, South Africa

Assessing video gaming events in South Africa: A supply and demand perspective

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Chapter 1: Introduction, the background to the problem, problem statement, goals and objectives and method of research

1.1 Introduction

Surpassing ‘Hollywood’ (United States [US] movie industry), the video gaming industry is the fourth largest entertainment industry in the world, lacking only behind the gambling, reading and television industry (BusinessTech, 2015a:internet). In today’s market, the video gaming industry is considered a pillar of the entertainment industry (Daidj, 2015:269). It is a globalised and very competitive market that is also one of the fastest growing sectors of the US economy (Daidj, 2015:269; Entertainment Software Association [ESA], 2014:1). In the past 30 years, the video game market has almost tripled its share of the total entertainment market in the US (Liamas, 2015:internet). In 2015, it was estimated that the global games market generated 74.2Bn US Dollars (USD) (Liamas, 2015:internet) and was projected to reach up to 107Bn USD in 2017 (Newzoo, 2015a:internet). This projection, however, was underestimated as the value of the global games market reached a value of 121.7Bn USD in 2017 and is expected to grow to 180.1Bn USD by 2021 (Wijman, 2018:internet).

Two primary sectors define the global video game market and make up the total global gaming revenue (Daidj, 2015:269). The first, and revenue-wise the smallest, the video game hardware sector consists of video game consoles (e.g. PS4, Xbox One, Nintendo Wii to name but a few), handheld video game consoles (e.g. PSP, PS Vita, Nintendo 3DS among others) and gaming accessories and peripherals (remotes, battery charger packs and console-related earphones to name but a few). The second, considered the best barometer of the industry's growth consists of the video game software sector, which includes digital sales (subscriptions, digital game sales, and mobile games), and retail game sales (Hollingworth, 2014:internet; Morris, 2015:internet).

Alternatively, South Africa's video gaming market revenues are only reflected in physical and digital disc sales, online micro-transactions, app-based and browser-based games, and advertising (PricewaterhouseCoopers [PwC], 2015a:117). The value of South Africa’s video game market was estimated at R2.6 billion in 2014, an increase from the R1.6 billion in 2010 (PwC, 2015a:116). In 2016, the market reached a value of R2.6 billion (PwC, 2017:77). Local video game revenue is forecast to grow at a rate of 15.4% CAGR (Compound Annual Growth Rate Calculator) and could reach R5.4 Billion by 2021 (PwC, 2017:77). Besides showing unprecedented growth, video gaming is also one of South Africa’s biggest

entertainment markets, overshadowing both the local film and music industries by box office revenues (BusinessTech, 2015b:internet).

Tourism is an industry that relies on the entertainment markets as a primary aspect of its growth (Gowreesunkar & Sotiriadis, 2015:2; Saayman, 2007:2). The tourism industry is one of the largest and fastest growing industries in South Africa (Saayman, 2007:16). The South African tourism industry, directly and indirectly, constitutes approximately 7% of the country's gross domestic product (GDP) and employment (Media Club South Africa, s.a.:internet). Entertainment within tourism provides opportunities for enjoyment, self-expression and satisfaction (Swarbrooke, Beard, Leckie & Pomfret, 2003:5). Entertainment activities within tourism can range anything from visiting festivals, movie premieres, amusement parks, sporting events, the circus, fairs, expositions, exhibitions, live performances, casinos, to shopping and visiting friends or family outside one's place of residence (Adeboye, 2012:9-10; Roopesh, 2015:39; Saayman, 2007:17). As an activity of entertainment, events are important motivators for tourism and can play a prominent role in the development and marketing of a destination (Getz, 2008:403). Events are used as mediators for entertainment through festivals, shows, exhibitions, carnivals, and concerts to name but a few examples, and are understood to be the nexus of tourism and event studies (Getz, 2008:403; Getz & Page, 2016:594-595). Therefore, from a tourism perspective and as an entertainment activity, video gaming events and in particular video gaming exhibitions are crucial motivators for travel.

The really Awesome gaming expo (rAge) is Africa's largest technology and video gaming exhibition and one that attracts people from all over South Africa (rAge Expo, 2012:internet). In 2016, this Johannesburg-based event attracted 34 693 visitors (rAge Expo, 2016a:internet). To the researcher’s knowledge, no other video gaming events of this magnitude are currently being hosted in South Africa. There are however a number of smaller video gaming events to be found in South Africa such as LANX, ICON, Electronic and Gaming Expo (EGE), RUSH, and VS Gaming Festival to name a few. Furthermore and regrettably, not all local video gaming events are successful with some bigger ones (more than a thousand attendees) such as rAge Cape Town and Organised Chaos (OC) being cancelled or discontinued over recent years. A potential cause or contributor is that limited research exists on video gaming events, not to mention on the South African video gaming market. A lack of such research severely restricts entry, investment, growth and general public understanding of video gaming events and its role in local creative tourism and the creative industry. Furthermore, creative tourism, as well as creative industries to date have also been under-researched and undervalued in developing countries such as South Africa.

To support these industries and in particular video game events, more research is required from both a supply- and demand side. By approaching research from both sides using mixed method techniques, a bigger and clearer picture can be provided on the object of study (Dörnyei, 2007:174). Therefore, the purpose of this study is to assess video gaming events in South Africa from a supply and demand perspective and fill the gaps in the current literature. The purpose of this chapter is to provide background to the problem and the problem statement, identify the goals and objectives of the study and discuss the method of research. The following section starts with a background to the problem.

1.2. Background to the problem

The background to the problem is divided into four sections, which briefly discusses the literature relevant to the study.

1.2.1 Video gaming industry as part of the creative industries

Creative industries are one of the fastest growing industries in the world and recognised by many countries as a way to boost economic growth and global investment (Lazzeretti, 2013:24-27). The idea behind creative industries originated from the term ‘cultural industries’ (Lazzeretti, 2013:24). The term ‘cultural industries’ was first used extensively by the Greater London Council (GLC) in the 1980s (O’Connor, s.a.:3). At the time, an economic recession and high budgetary cuts took place whereby the value of 'culture' was recognised as a way to alleviate economic problems (O’Connor, s.a.:3). As a result, policy frameworks were developed to fund and support the cultural sector. Cultural industries were considered those that delivered goods and services that ‘embody or convey cultural expressions, irrespective of the commercial value they may have’ (United Nations Educational, Scientific and Cultural Organization [UNESCO], 2005:5). A modern definition of the ‘cultural industry’ refers to it as being those ‘industries which combine the creation, production and commercialisation of creative contents which are intangible and cultural in nature’ (UNESCO, 2006a:3). Cultural industries include publishing, music, cinema, audio-visual production, and multimedia, as well as arts and design (UNESCO, 2006b:1).

Creative industries, as opposed to cultural industries, include the cultural industries but by which the product or service contains a substantial element of artistic or creative endeavour (UNESCO, 2006a:3). Additional activities included in creative industries, separate from cultural activities, are architecture, advertising, and computer software and video games (UNESCO, 2006a:3). In 1998, the term ‘creative industries’ became popularised when the United Kingdom’s (UK’s) then ‘New Labour’ party renamed ‘cultural industries’ to ‘creative industries’, producing the first ‘Creative Industries Mapping Document’ (Jayne, 2005:537).

The document legitimised creative industries as an object of policy, placing creative and cultural industry strategies at the heart of local economic strategies (Jayne, 2005:537). The document identified 13 creative industries linked to the policy, including advertising, antiques, architecture, crafts, design, fashion, film, leisure software, music, performing arts, publishing, and TV and Radio (Department for Culture, Media and Sports [DCMS], 1998). In 2001, the DCMS released a new 'Creative Industries Mapping Document' defining creative industry as those forming part of it have their origin in creativity, skill and talent and have the potential to create wealth and jobs through the generation and exploitation of intellectual property (DCMS, 2001:4). The new definition focused more on the reproduction of intangible creative and expressive content since digital technology and intellectual property rights started playing a stronger role in the reproduction of 'culture' (O'Connor, 2007:7; The Work Foundation, 2007:103; UNESCO, 2015:1).

Popularised by economic, social and cultural value, many governments also started to adopt/adapt policy frameworks for their own creative industries (UNESCO, 2013a:21). This resulted in the creation of new or modified creative and cultural industry models. Concerning South Africa's model, six creative industries are recognised, namely film, crafts, music, performing arts, visual arts and cross-cutting sectors (Joffe & Newton, 2007:11). The cross-cutting sectors include design, heritage and cultural tourism (Joffe & Newton, 2007:11). Unfortunately, video games are not included in this model, even though the industry features a prominent role in more recognised models such as the DCMS model (DCMS, 2001), Symbolic text model (Hesmondhalgh, 2002), Concentric circles model (Throsby, 2001; UNESCO, 2013a), UIS Trade-related model (UNESCO Institute for Statistics, 2005), John Howkins' model of creative industries (Howkins, 2001), the United Nations Conference on Trade and Development (UNCTAD) model (UNCTAD, 2008), Americans for the Arts model (Americans for the Arts, 2005) and WIPO Copyright Model (World Intellectual Property Organization [WIPO], 2003). Furthermore, although South Africa has taken responsibility for enhancing the growth potential of the creative industries, such industries remain neglected in the mainstream trade and industry policy (African Arts Institute [AFAI], 2015:internet; Joffe & Newton, 2007:11; Mail & Guardian, 2014:internet). South Africa is also criticised for being biased towards commercial viability (funding, grants and resources) while support for 'art-for-art's' sake is neglected – support for the cultural development of theatres, dance and music is declining annually (AFAI, 2014:11; Joffe & Newton, 2007:11). A lack of support for these industries, especially the video gaming industry, negatively impacts the entertainment industry as well as the creative tourism potential.

1.2.2 Video gaming industry as part of creative tourism

Cultural and heritage tourism is known to be the fastest growing tourism market worldwide (Grobler, 2008:164). In South Africa, heritage and cultural tourism is an industry that is closely linked to the nation's past (Grobler, 2008:164). After apartheid (April 27, 1994), many new memorials, statues, and heritage sites were inaugurated, not to mention the acceptance and inclusion of different cultural traditions, making heritage and cultural tourism a strongly emerging sector of the South African tourism industry (Marschall, 2005:103). As a subset of cultural tourism, creative tourism presents great potential for economic development and cultural regeneration (Spencer & Jessa, 2014:1457). Similar to the evolution of video games, creative tourism caters for a new generation of entertainment seekers (UNESCO, 2006c:2). Creative tourism is also a relatively new concept within tourism literature (Spencer & Jessa, 2014:1457). Richards and Raymond (2000:18) define creative tourism as:

> Tourism which offers visitors the opportunity to develop their creative potential 'through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken'.

Creative potential comes from linking tourism with the creative industries (Organization for Economic Cooperation and Development [OECD], 2014:63). The synergy between these two industries supports the development of tourism, creative sectors, creative export and the development of policies (OECD, 2014:3).

Many cities around the world make use of events to support creative input (Richards, 2009a:6). These events attract creative tourists to a destination with the goal of achieving wider cultural social and economic benefits (Richards, 2009a:6). Creative tourists are defined by four important propositions, namely creative potential, active involvement (active in the creation process), characteristic experiences (creative environment provided by the destination) and co-creation (creative experiences are jointly made by producers and consumers) (Richards, 2009a:4-5). Having said this, video gaming events such as the rAge Expo in Johannesburg complies with all four categories. The reasons being that it is an event that utilises video games as the base of creative potential, it is held in a unique venue hosting various thematic booths, stalls and activities that engage attendees, and co-creation of experiences is made through developer interactions, demonstration booths, competitions and interactions with other gaming enthusiasts. Furthermore, video gaming events can promote the video gaming industry as it provides exposure and opportunities for video gaming activities and/or sales to take place.

1.2.3 Previous research conducted regarding the video gaming industry

Based on revenue predictions, video games will grow to be the second largest entertainment industry in the world (Marchand, 2016:141). Video games are already one of the largest entertainment products for many teenagers and young adults, and one of the fastest growing and most exciting forms of mass media (Cross, as cited by The Economist, 2011:1; Marchand, 2016:141). Regardless of its global presence, the video gaming industry remains poorly investigated, especially compared to other entertainment or creative industries (Marchand, 2016:141). This leaves many questions unanswered and as such results in many industries, practitioners relying on empirically unproven rules of thumb, or in other words, broad but not strictly accurate principles (Marchand, 2016:141).

Despite poor investigative inquiry, many profiling reports on video gaming markets can be found in first-world countries such as the US (ESA, 2015:2-3), Canada (Entertainment Software Association of Canada [ESAC], 2015:8), the UK (Stuart, 2014:internet) and Germany (Germany Trade and Invest [GTAI], 2012:1). Besides profiling gamers, other international industry research trends include reports on global market sizes and growth statistics (Casual Games Association [CGA], 2014:3-9; ESA, 2015:13; Newzoo, 2015a:internet, 2015b:internet); video game console sales (Marchand, 2016:141; MarketLine, 2015a:9, 2015b:9-10; Statista, 2016a:internet); video game software sales (Gil & Warzynski, 2013:159; MarketLine, 2015c:8-11; Statt, 2015:internet); digital game sales (ESA, 2015:13; Statt, 2015:internet); active video game studios (Ball, 2014:internet; ESAC, 2015:4); industry size and revenue figures (Ball, 2014:internet; ESAC, 2015:4); employment statistics (ESAC, 2015:4; GTAI, 2012:1; International Game Developers Association [IGDA], 2005:internet, 2014:internet); online gaming statistics (GTAI, 2012:2; Shah & Haigh, 2005:19); social gaming statistics (GTAI, 2012:2); mobile gaming statistics (GTAI, 2012:2; Newzoo, 2015c:internet); payment systems (GTAI, 2012:2); industry structures (Langlotz, Rhode & Whaley, 2008:11); regional and global value chains (Langlotz *et al*., 2008:14-17; Shah & Haigh, 2005:34); video game advertising (Shah & Haigh, 2005:29-31); genres by units sold (ESA, 2015:10); and top selling video games (ESA, 2015:11) to name a few.

In relation, South Africa has a small global presence when it comes to video game markets and research compared to leading video gaming industries such as the US, China, Germany and the UK (see Springer Nature Limited, 2018:internet; Newzoo, 2018:internet). Despite this, South Africa remains one of the largest video gaming markets in Africa (Nkabinde, 2016:internet). In 2018, South Africa had the second largest video gaming industry in Africa and the 45th largest in the world (Newzoo, 2018:internet). However little, South Africa does also share in video gaming industry-related research and statistics, including reports on

market worth and growth statistics (Smith & Dorasamy, 2013:242), physical and digital software sale statistics (Smith & Dorasamy, 2013:242; PwC, 2015a:117), online/micro transactions (PwC, 2015a:121); social/casual revenue statistics (PwC, 2015a:122); mobile gaming statistics (PwC, 2015a:122); video game advertising statistics (PwC, 2015a:123); active video game studios research (Make Games South Africa [MGSA], 2015:3-6; Hall, Watson & Kitching, 2017:8), and employment statistics (MGSA, 2015:10-11; Interactive Entertainment South Africa [IESA], 2016:10). Furthermore, it has been forecasted that the social gaming market will be the predominant market by 2019, with a rise in digital, app-based and online sales and a slow decline in physical disc sales (PwC, 2015a:120). This benefits the majority of local game developers whose primary focus is aimed at releasing app-based games (Nkabinde, 2016:internet). Nonetheless, the fact that these statistics exist shows that there is interest to understand and grow the South African video gaming industry.

1.2.4 The South African video gaming industry

As mentioned in the introduction, South Africa's video game market and future projections are only reflected in software-related sales and advertising (PwC, 2015a:116). This means that the local video gaming industry does not include hardware sales as represented in global values provided by PwC (2015b:internet) and Newzoo (2014a:3, 2015a:internet, 2015b:internet). Besides this shortcoming, the South African industry also faces several barriers or obstacles restraining its growth. These barriers restrict entry and investment and, if overlooked, will not change South Africa's position in the global market. Among these barriers are included: limited access to local talent (Mulligan, 2015:internet); limited access to distribution channels for games (Mulligan, 2015:internet); a lack of internet infrastructure for online gaming and digital game downloads (Mulligan, 2015:internet); policy uncertainty surrounding tax treatment and regulation towards commercialisation of local games (Hall, as cited by Nkabinde, 2016:internet); a lack of job opportunities for students wishing to enter the video gaming industry (Hall, as cited by Usmani, 2016:internet); marketing and distribution issues due to low funding and game developing budgets (Hall, as cited by Nkabinde, 2016:internet); a lack of understanding of the regional markets and not being able to cater for them (Selander, as cited by Cilliers, 2014:internet) and the fact that 'video games are expensive' (Kriel, 2015a:internet). A lack of industry understanding and regional market knowledge removes many investors from gaming-related products and activities, making South Africa's gaming industry a very difficult space to work in (Bulford, as cited by Van der Berg, 2014:internet). Hence there is a need to understand the video gaming markets in South Africa. A need such as this extends to video gaming events as it restricts the organiser's ability to properly assess gamer target market needs and behaviours.

Firstly, this is where doing a demand-side analysis of video gaming events is important as it allows one to focus on the profile, behaviours and motives of video game markets who attend video gaming events. By applying the self-determination theory as the foundation of demand-side research one can aim to explain individual goal-directed behaviour (Walsh, 2011:internet). Self-determination theory specifies that people want to feel effective in their activities (competence), feel that their activities are self-determined (autonomy), and feel a sense of closeness or to be connected with others (relatedness) (Ryan & Deci, 2000a:70-71). According to Sheldon, Elliot, Kim and Kasser (2001:335), all three motivational orientations are important for having a satisfying experience at events. The three motivational orientations are also found as intrinsic motivations to why people play video games (see Granic, Lobel & Engels, 2014:66-67; Olson, 2010:182; Przybylski, Rigby & Ryan, 2010:155; Ryan, Rigby & Przybylski, 2006:358; Schoenau-Fog, 2012:329; Vorderer & Bryant, 2006:115). The self-determination theory thus forms the theoretical framework on which the demand-side analysis is based, providing valuable insight into key video game market behaviour for hosting successful video gaming events.

Secondly, by doing a supply-side analysis, important critical success factors can be identified for hosting successful video gaming events. Critical success factors have been an interest of several supply-side studies on planned events (see De Witt, 2006; Kruger, 2006; Lade & Jackson, 2004; Manners, Saayman & Kruger, 2015). Planned events in tourism are created with the purpose to bring value to a destination (Gration, Raciti, Getz & Andersson, 2016:607; Small, 2007:54). Critical success factors are also an important area within the field of event management (see De Witt, 2006:60-61) and the meetings, incentives, conventions and exhibitions (MICE) industry (see Ismail, 2014:vi). According to Manners, Kruger and Saayman (2016:148), both demand- and supply-side perspectives within planned events are important for identifying critical success factors to manage memorable visitor experiences. Therefore, it is important to identify critical success factors for hosting video gaming events from a supply side. In doing so, one can create a typology or assessment that serves as an organising framework for hosting successful video gaming events. By approaching both supply and demand-side perspectives, this study will aim to fill the gap in the current literature on the profile, behaviours and motives of local video gaming markets, as well as to identify key themes and critical factors for hosting successful and memorable video gaming events for different attendee markets.

1.3 Problem statement

The video gaming industry is a growing billion-dollar industry (ESA, 2014:10). It is one of the largest and fastest growing creative industries and a primary sector of many creative and

cultural industry models (c.f. 1.2.1). In his State of the Nation Address on 11 February 2016, the then South African President Jacob Zuma, emphasised the importance of the creative industries and indicated that The Presidency has established the Presidential Creative Industries Task Team to support local artists (News24, 2016:internet). Unfortunately, the creative industries sector report does not include the video gaming industry for this support (Joffe & Newton, 2007:11). Inefficient research is a major cause of this limitation. A lack of understanding severely restricts investment and South Africa's entry into video gaming market (Bulford, as cited by Van der Berg, 2014:internet). Fortunately, video gaming events hold the potential of transcending many of the barriers plaguing the South African video gaming industry (Usmani, 2016:internet). Events such as the rAge Expo support local developers by providing exposure and in some cases with heavily discounted booth fees; job opportunities are created to staff; the event;, and fast, stable internet speeds are available (Usmani, 2016:internet). Furthermore, rAge initially began as a need to grow the local gaming community and to support local gaming-related pursuits (Michael James, as cited by Usmani, 2016:internet). Video gaming events also provide great opportunities for conducting market research on gamers since they are primarily the audiences targeted for attending. Regrettably, limited market research exists on video gaming events as such, with available statistics merely showing attendance numbers, ticket sales or exhibitor numbers (see Electronic Entertainment Expo [E3], 2016:internet; Gamescon, 2016:internet; PAX Prime, 2015:internet; Tokyo Game Show, 2016:internet). This raises several questions such as: What is the demographic profile of gamers/attendees? What are their spending behaviours? What gaming preferences do they have? What motivates them for playing games? Why do they attend video game events such as the rAge Expo?

Research of this nature is therefore essential to create market awareness. According to Ann-Sofie Sydow, a member of the board of Diversi and the Association of Swedish Game Developers (ASGD), numbers and figures help people to understand and value the industry, together with setting strong goals, values and supporting one another (Cilliers, 2014:internet). By doing a demand- and supply-side analysis, one can determine or create new resources (supply) to resolve uncertainty (demand) and discover, create and exploit opportunities (Karri & Goel, 2006:8). In theory, a demand- and supply-side analysis could aid video gaming event organisers to make informed decisions concerning target markets, marketing efforts and planning processes, help determine necessary resources to be allocated, provide a basis to attract investor and government support, and identify key success factors for hosting memorable experiences. Furthermore, a demand- and supply-side analysis could add to the current literature on the video gaming industry, as part of the creative industries, and its contribution to creative tourism and event tourism. In the absence

of a demand- and supply-side analysis, no measuring instrument for analysing video gaming events will exist and the full potential of video gaming events might never be realised in South Africa.

To fill the gap in the current literature, this thesis aims to answer the following questions:

- What is the socio-economic profile of gamers at video gaming events (rAge Expo)?
- What are the gaming behaviours and preferences of gamers in South Africa?
- What motivates gamers for playing video games and attend video gaming events?
- What are the main objectives when hosting video gaming events?
- What are the critical success factors for hosting video gaming events?
- What are the strengths, weaknesses, threats and opportunities when hosting video gaming events in South Africa?

Ultimately, this research assesses the video gaming industry from both a supply and demand perspective.

1.4 Goal and objectives of the study

1.4.1 Goal

To assess video gaming events in South Africa from a supply and demand perspective.

1.4.2 Objectives

The achievement of the goal relies on the following objectives:

- **Objective 1**

To investigate the creative industries and creative tourism by means of a literature review. Literature themes such as the creative economy, cultural tourism and creative tourism, the cultural industry (evolution and characteristics) and the creative industries are examined. The detailed analysis of creative industries features aspects such as changing the reference from cultural industries to creative industries, expressive and physical artefact values in creative industries, models of cultural/creative industries, the geography of creative industries, creative industries in developed and developing countries and creative industries in South Africa.

- **Objective 2**

To conduct a literature analysis on exhibition management and events. This includes doing a critical overview of event management (previous research, careers, stakeholders, buyers and suppliers), planned events in event tourism (classification, size and scale, benefits) and the MICE sector (classification of exhibitions, exhibition management, exhibition demand and supply, benefits and previous research).

- **Objective 3**

To provide a detailed overview of the video gaming industry by means of a literature review. This includes a detailed literature analysis on the video gaming industry (definition, size, trends, history and characteristics), video games in general (history and evolution, their benefits and challenges, and the value/creative chain of video games) and the role and value of video game events.

- **Objective 4**

To assess video gaming events from a demand side by determining gaming and purchase behaviours, motives for playing games, motives for attending video gaming events, and event-evolution factors of visitors to the rAge Expo Johannesburg. The following research aspects will be determined:

  - The demographic profile of visitors to the rAge Expo;
  - The gaming behaviours and preferences of gamers;
  - The purchase behaviours of gamers to the rAge Expo;
  - The motives for playing video games;
  - The motives for attending the rAge Expo;
  - The event evaluation factors of visitors to the rAge Expo; and
  - Creative output as a result of playing games.

- **Objective 5**

To assess video gaming events from a supply side by determining themes based on video gaming organisers' perspectives concerning factors that come in play when choosing a venue, main objectives for organising video gaming events, how to deal with changing market trends, critical success factors, and the current state of video gaming events in South Africa.

- **Objective 6**

To draw conclusions and make recommendations regarding an assessment of video gaming events in South Africa from a supply and demand perspective. This includes providing an assessment of how to ensure a memorable experience and host successful video gaming events.

1.5 Methodology

This exploratory research follows a mixed-method approach that includes both quantitative and qualitative research methods. Dörnyei (2007) writes: 'A mixed method study involves the collection or analysis of both quantitative and qualitative data in a single study with some attempts to integrate the two approaches at one or more stage of the research process' (p. 163). A mixed method is also a good approach for conducting research as it provides a clearer and bigger picture of the object of the study (Dörnyei, 2007:174). The method of investigation comprised two phases. Phase 1 consisted of a self-administered questionnaire survey at the rAge Expo in Johannesburg while Phase 2 consisted of telephonic interviews with video game event organisers in South Africa.

1.5.1 Literature Study

The literature study consists of an analysis of the creative industries, exhibition management and events, the video gaming industry and video gaming events. It is important to note that information related to video games and the gaming industry such as news articles, statistics, research, reviews, previews, industry reports and articles are predominantly found on the internet and/or posted by websites devoted to video games (see Locke & Uhrínová, 2017:37; University of Michigan Library, 2018:internet). Therefore, many references within this study concerning the video gaming industry and its relation to the creative industries are web-based references, although not exclusively. The following resources were consulted to gather the information needed to conduct the above literature analyses:

- Scientific databases: Google Scholar, North-West University's One Search database library, online library catalogues and indexes, EBSCOhost Research Database, and Science Direct.
- Statistic Databases: Statistica, PricewaterhouseCoopers and Newzoo.
- Internet Search engines: Google, Firefox, Bing and Yahoo.
- Articles and Journals on creative industries, cultural industries, creative economy, video games, gamers and video gaming industry.

- Books published in the field of creative industries, cultural industries, creative economy, exhibition management, event management, planned events, video games and the video gaming industry.
- Research reports concerning creative industries, cultural industries, creative economy, planned events sector, video games, gamers and video gaming industry.
- Video game websites: IGN, Gamespot, GameFAQs, GamesRadar, Game Trailers Corp and PC Gamer to name but a few.
- Theses and dissertations on creative industries, cultural industries, event tourism, event management and gamification.

1.5.2 Phase 1: Demand-side survey

The following section highlights the methods chosen to conduct the empirical analysis.

1.5.2.1 Research design and method of collecting data

A Quantitative research approach was followed by means of a self-administered questionnaire survey. Quantitative research is an inexpensive method that enables the researcher to gather large sample sizes that are easy to tabulate and analyse in statistical programmes (Microsoft Excel and SPSS) (Maree & Pieterson, 2007a:155). Also, surveys can provide data on identifiable issues such as socio-demographic profiling (age, gender, income etc.) and behavioural profiling (motives for attending video game events, motives for playing games, gaming and purchase behaviours) of a target population (Prideaux & Crosswell, 2006:368). By using questionnaires, the researcher has access to descriptive and exploratory research approaches (Prideaux & Crosswell, 2006:368), both of which were used to serve the purpose of this study. The descriptive research approach allows information to be gathered in a systematic manner that is accurate and factual (Douris, 2002:2; Van Vuuren, 2010:11). Descriptive research was done to determine the socio-demographic profile of rAge attendees, gaming and purchase behaviours, their motives for attending, and event evaluation factors. The exploratory research approach, on the other hand, allows the researcher to explore the relationships between variables (Douris, 2002:25). Statistical techniques used in the exploratory research approach included factor analyses, cluster analyses, ANOVAs, Tukey's $B_{a,b}$ Post hoc tests and cross-tabulations (c.f. 1.6.2.5).

1.5.2.2 Selection of the sampling frame

A total of 34,693 visitors attended the 2016 rAge Expo in Johannesburg (rAge Expo, 2016a:internet). Using the sample size formula, an efficient method for determining a

representative sample size for a given population (Krejcie & Morgan, 1970:607), it was determined that a sample size of 380 (n) from a population of 35 000 (N) and above with a confidence level of 95% would yield a margin error of 5% (Creative Research Systems, 2012:internet). If assumed that the standard error = 0.05, a population size of 35 000 (N) would require a sample size of 380 (n) (Krejcie & Morgan, 1970:607). A population size of 40 000 (N) would yield the same results; therefore, making a sample size of 380 (n) representative.

A total of 450 questionnaires were distributed, and 420 questionnaires were fully completed at the rAge Expo in Johannesburg and was included in the analysis; thus a valid sample size was obtained. This resulted in a 93% level of completion. The data was captured in Microsoft Excel® and analysed using the Statistical Package for the Social Sciences (SPSS) Version 25 (2018). The cluster analyses were performed in Statistica Version 13.3 (StatSoft, Inc., 2018).

1.5.2.3 Sampling method

A non-probability sampling technique, convenience sample, was employed based on the assumption about the nature of the population under study. Non-probability sampling is a process where subject are selected based on subjective judgement, rather than random selection, whereas convenient sampling allows subjects to be chosen based on ease and accessibility (Crossman, 2001:internet; Dörnyei 2007:129; Maree & Pietersen, 2007b:177). The survey took place within the Ticketpro Dome in Randburg, Northern Johannesburg. The distribution of the questionnaires at the Expo allowed the researcher to sample a target population based on ease, accessibility and availability. At the event itself the questionnaires were distributed by fieldworkers at different sections, including the NAG LAN, demo booths, retail booths and other areas within the Ticketpro Dome. Respondents were intercepted and the aims of the study were explained, after which the questionnaires were distributed to willing participants.

Furthermore, the 7th and 8th of October 2016 were the only dates used to distribute the questionnaires even though the event took place on the 7th, 8th and 9th of October 2016. The sample size was reached (exceeded) and all 450 available questionnaires were distributed within those two days; hence the non-distribution of questionnaires on the 9th of October.

1.5.2.4 Development of the questionnaire

Since no standardised measuring instrument existed for doing a demand-side-analysis at video game events, a new questionnaire was developed by the researcher based on existing information and with the assistance and approval of the event organisers. The questionnaire was divided into five sections, namely Section A: Socio-demographic profile, Section B: Gaming and purchase behaviours, Section C: Motives for playing video games, Section D: Motives for attending rAge and event evaluation (see Appendix A). The same questionnaire would have been distributed at rAge Cape Town on April 2017 in the Century City Conference Centre, but was unfortunately cancelled due to 'financial and logistical concerns' (James, as cited by rAge Expo, 2017:internet). The sections identified for the questionnaire are examined as follows:

- **Section A: Demographic profile**

The questionnaire measured attendees' socio-demographic and socio-economic characteristics which have previously been tested at a variety of festivals, events and exhibitions (see Botha & Slabbert, 2011; Kruger & Saayman, 2012a, 2016; Kruger, Scholtz, Saayman, & Saayman, 2012; Kruger, Scholtz, Saayman, Saayman & Rossouw, 2012; Manners, Saayman *et al*., 2015; Manners, Kruger & Saayman, 2015), including national parks in South Africa (Du Plessis, Scholtz & Saayman, 2012; Kruger, Scholtz & Saayman, 2012). This section included questions on gender (question 1), age (question 2), home language (question 3) marital status (question 4), province of residence (question 5), level of education (question 6), occupation (question 7), annual income (question 8), residency in Johannesburg (question 9a, b), types of tickets purchased (question 10), place of ticket purchase (question 11), people travelling in a group and paid for (question 12a, b), spending at event (question 13), times visited event (question 14), other event attendances (question 15).

- **Section B: Gaming and purchase behaviours**

Gaming and purchase behaviour questions were formulated using industry reports on gaming trends, gaming behaviours and spending statistics (ESA, 2015; ESAC, 2015; Granic *et al*., 2014; Langlotz *et al*., 2008; Newzoo, 2014a; PwC, 2015a; Statista, 2016a). Questions within this section include the age first started playing games (question 16), first gaming device (question 17), gaming devices used and preference (question 18a, b), gaming purchases made regularly (question 19), spending on video game software (question 20), spending on video game hardware (question 21), preferred type of gaming (question 22), genre of games played (question 23), importance of gaming aspects (question 24), time spent playing video games (question 25), self-identification as gamer (question 26), and

favourite video game titles (question 27). A five-point Likert scale question (question 24) was used to determine the level of importance when playing games, in which 1 = Not important at all, 2 = Less important, 3 = Undecided (neutral), 4 = Important, and 5 = Extremely important (absolutely essential).

- **Section C: Motives for playing video games**

Section C focused on the reasons for playing video games (question 28). The question was presented as a five-point Likert scale question by means of which attendees determined the level of agreeability between a list of motives for playing video games, in which 1 = Strongly disagree, 2 = Disagree, 3 = Undecided (neutral), 4 = Agree, and 5 = Strongly agree. Literature on video gaming motives and reasons for playing video games was consulted to formulate the items found in this question (Granic *et al.,* 2014; Olson, 2010; Przybylski *et al*., 2010; Ryan *et al*., 2006; Schoenau-Fog, 2012; Skalski, Dalisay, Kushin & Liu, 2012; Vorderer & Bryant, 2006), as well as industry reports on gaming trends (ESA, 2015; Interactive Games & Entertainment Association [IGEA], 2016; Newzoo, 2014a).

- **Section D: Motives for attending rAge and event evaluation**

This section included two five-point Likert scale questions based on levels of agreeability, where 1 = Strongly disagree, 2 = Disagree, 3 = Undecided (neutral), 4 = Agree, and 5 = Strongly agree. The first five-point Likert scale concerned itself with attendance motives pertaining to the rAge Expo in Johannesburg (question 32). The items included in this question were based on and adapted from works on motives for attending events (Blythe, 1999; Crompton & McKay, 1997; Godar & O'Connor, 2001; Lee, Yeung & Dewald, 2010; Kruger, Saayman & Ellis, 2014; Nicholson & Pearce, 2001; Saayman, 2011; Wei & Lin, 2015). The second five-point Likert scale question focused on how attendees evaluated certain event-related aspects (question 33). The items identified for this section were based on and adapted from works on visitor satisfaction and studies that included event-evaluation research (Botha, Slabbert, Rossouw & Viviers, 2011; Leenders, 2010; Manners, Kruger *et al*., 2015; Van Niekerk & Coetzee, 2011; Williams & Saayman, 2011). Other questions found in this section include the self-identification as a creative person (question 29a), creativity as result of video games (question 29b), age of first exposure to rAge (question 30), source of exposure to rAge (question 31), future rAge attendance (question 34), and recommendations or suggestions concerning rAge (question 35).

Furthermore, several steps were taken to ensure the validity and reliability of the questionnaire. These steps are discussed in detail in Chapter 5. According to Tustin *et al.*

(2005:184), there are four significant steps to follow for designing and validating a questionnaire, namely:

- **Step 1: Content validation**

As evident in the sections identified above, appropriate literature sources were consulted to formulate the questions.

- **Step 2: Face validity:**

The Statistical Consultation Services at North-West University, Potchefstroom, advised on the formulation of the statements and the measuring scales used.

- **Step 3: Construct validity**

Construct validity was determined by using various statistical techniques to determine different constructs within this study. Firstly, factor analyses were done during which items were appropriately selected and allocated according to relatability (c.f. 5A.4.2). Observable differences were evident amongst all selected factors, allowing measurable conclusions to be drawn. In other words, factor values were compared with one another and compared among different market segments. Secondly, cluster analyses were employed to place respondents in different market segments. The segments were observably different and measurable comparisons could be made between segments concerning demographic profiles, gaming and purchase behaviours, motives for playing video games factors, motives for attending rAge factors and event evaluation factors.

- **Step 4: Reliability**

Factors for all three factor analyses were determined using Kaiser's criterion whereby components were selected with an eigenvalue of 1 or more. All but one factor (loading of 0.26) included item loadings above 0.3. It is recommended to suppress loadings less than 0.3 (Field, 2013:692) and remove loadings less than 0.2 (Samuels, 2016:1), but the inclusion of loadings less than 0.4 should be accompanied by a factor with three loadings larger than 0.4 (Samuels, 2016:2). In the case of this study, all factors with item loadings below 0.4 included at least three items with loadings above 0.4. Furthermore, the total variance explained for all three factor analyses was above 50%, which is considered an acceptable value to explain variance (Pietersen & Maree, 2007:218). Concerning the cluster analyses for market segmentation purposes, Ward’s method with squared Euclidean distances was used to determine the structures of the segments (c.f. 5A.4.3).

1.5.2.5 Data analysis

The data collected from the questionnaires were captured using Microsoft Excel™ and processed using IBM® SPSS® Statistics computer software. Capturing and processing data using statistical software allows for presenting findings in a logical manner (Dissel, 2009:7). Descriptive statistics were done using Microsoft Excel™ to profile attendees' demographics, gaming and purchase behaviours, motives for playing video games, motives for attending the rAge Expo and event evaluation aspects. Exploratory statistics were done using IBM® SPSS® Statistics computer software. The exploratory research approaches included factor analyses, cluster analyses, ANOVAs, Tukey's $B_{a,b}$ Post hoc tests and cross-tabulation, and are explained as follows:

Exploratory factor analyses were done on three five-point Likert scale questions. The first factor analysis was done on the motives for playing video games (question 28 in questionnaire); the second factor analysis was done on the motives for attending the rAge Expo in Johannesburg (question 32 in questionnaire) and the third factor analysis was done on the evaluation of expo-related aspects (question 33 in the questionnaire). Factor analyses are statistical methods used for investigating linear relationships between a large number of variables and a smaller number of unobservable factors, by either testing or confirming a generalisation among variables (Child, 2006:1; Tryfos, 2001:1). The factor serves as a summation of a large number of variables with similar qualities (Pallant, 2010:181). See 5A.4.2 for more information on construct and reliability.

Concerning the market segmentation results, two separate market segmentation bases were employed. This included doing two cluster analyses to divide data into groups (Tan, Steinbach, Karpatne & Kumar, 2018:487). This technique was used to segment the respondents into meaningful and useful groups. Firstly, respondents were segmented based on their motives for playing video games and secondly, respondents were segmented based on their motives for attending the rAge Expo.

ANOVAs were then employed to reveal differences or similarities between the identified market segments. In addition, Tukey's $B_{a,b}$ Post hoc tests were done to determine significant differences between mean values, and Cohen's *d* was used to calculate any additional and practically significant differences in effect sizes. Finally, cross-tabulation was used to further determine whether statistically significant differences existed between the segments, based on categorical questions. For a more detailed decision on all the above-mentioned statistical techniques employed, see 5A.4.3.

1.5.3 Phase 2: Supply-side interviews

The following section highlights the methods chosen to conduct the interviews.

1.5.3.1 Research design

A qualitative research method was followed by means of telephone interviews. The research design followed a case-study approach. Case studies have largely been used in qualitative methodology (Mills, Durepos & Wiebe, 2010:109) and for doing social science research (Yin, 2003:1). A case study is described as 'an intensive, holistic description and analysis of a single instance, phenomenon, or social unit'. Case studies enable the researcher to closely examine the data within a specific context to explore and explain complex issues (Zainal, 2007:1). It also enables the researcher to strive towards a holistic understanding of how participants relate and interact in a specific situation and how they make meaning of the phenomenon studied (Niewenhuis, 2008a:75). Hence case-study research was used to better understand the meanings attached by those within the system. In this case, eight organisers were involved working on separate video gaming events.

1.6.3.2 Data collection

Data for the research was collected by means of structured interviews. The use of structured interviews for collecting qualitative research within case studies ensures a structure is followed where questions are detailed and developed in advance (Niewenhuis, 2008a:75). In this study, initial questions were posed to determine the profile of the participant (level of education, career ladder and job title) and the profile of the event (the type of event, year established, dates and duration, venue, attendance numbers and event objectives). Further questions were posed to determine critical success factors for hosting successful events such as the aspects that generate memorable experiences, responses to changing market trends, a strengths, weaknesses, opportunities and threats (SWOT) analysis of the event, contributions to gamers, developers and the industry made by the event (c.f. Appendix B). Last of all, the question was posed to determine the organisers' perspectives on South Africa's video gaming industry and how video gaming events can facilitate tourism. For more information on data collection see 5B.2.2.

1.5.3.3 Participants

Purposive sampling was done to select relevant sources involved in the organisation of video gaming events. Purposive sampling is a non-probability sampling technique by means of which samples of a population are purposefully selected due to their relation to or representativeness of a phenomenon and can provide credible information on the said phenomenon (Etikan, Musa & Alkassim, 2016:1). The organisers of video gaming events in

South Africa were identified via online sources on gaming events (see SA Gamer, 2018; MWEB Gamezone, 2018; Zombiegamer, 2018). Organisers of some of the biggest and more popular events were contacted and informed on the study via Facebook, email and telephone. Eight participants willingly agreed to participate and were telephonically interviewed over the months of March and May 2018. For a more detailed examination of the participants see 5B.2.3.

1.5.3.4 Data analysis

The telephone interviews conducted with participants were recorded and transcribed in a narrative form. Creswell's (2009:185) six steps to data analysis and interpretation thereof were used to analyse the data in a viable and reliable manner. This included organising and preparing data for analysis, reading through all the data, doing a detailed analysis using a coding process to generate and describe themes for analysis, describing how categories and themes are presented in a qualitative narrative and interpreting the data to make meaning. Refer to 5B.2.4 for a more detailed discussion on how these steps were achieved as well as how trustworthiness was achieved.

1.5.3.6 Ethical considerations

Ethical approval was obtained from the Ethics Committee of North-West University (Potchefstroom Campus: EMS24/05/16-02/01). Research ethics refers to applying moral standards in the planning, conducting and reporting of the results and protecting the welfare of the research participants (McNabb, 2004:55; Wassenaar, 2006:33). The researcher took ethical steps in respecting the rights, needs, values, and desires of the participants (see Creswell, 1994:148). This included maintaining a degree of anonymity whereby all participants were informed that their identity would be protected and that they could withdraw from the research project at any time. This applied to the participants of the visitor survey and to the interviews conducted with the event organisers. Concerning the visitor survey, participants were approached with the aim of the study being explained to them and a brief summary of the questions included in the questionnaire. Participants were informed that completion of the questionnaire was voluntary, and after permission was granted the questionnaires were distributed to and completed by the respondents. The participants identified for providing the supply-side perspective were contacted via telephone, email and/or Facebook and were informed about the aim of the study. The participants contacted were selected based on their organising role in video gaming events of whom eight agreed to sit in for the interviews. Consent was given by all eight participants before interviewing commenced. Participation in the interviews was voluntary on a time and date stipulated by

each participant. Additionally, anonymity also extended to the events organised by these participants.

1.6 Definitions of key concepts

The following concepts are used regularly throughout the thesis and therefore need some clarification.

1.6.1 The creative industries

The creative industries originate from the term 'cultural industries' which refers to those activities involved in the mass reproduction and commercialisation of intangible and cultural in nature expressive outputs (goods and services) that are based on copyright (UNESCO, 2006a:3; UNESCO, 2015:1). This includes industries such as publishing, music, cinema and audio-visual production, multimedia industry, as well as the arts and design industry (UNESCO, 2006b:1). The line between defining cultural industries and creative industries, however, is very vague since the terms are often used synonymously (see Moore, 2014:741; The Work Foundation, 2007:103; UNESCO, 2015:1). As opposed to cultural industries, creative industries place stronger emphasis on artistic or creative endeavours (UNESCO, 2006a:3). By this account, the creative industry differs from the cultural industry. Creative industries are therefore defined as those industries involved in the cycle of creation, production and the distribution of goods and services, whereas creativity and intellectual capital are the primary input thereof (UNCTAD, 2008:4).

1.6.2 Creative tourism

Creative tourism is positioned as an extension or subsection of cultural tourism (Richards & Wilson, 2006:1215). It is a relatively new concept within tourism and one that caters to a new generation of tourists (Tan, Luh & Kung, 2014:248; UNESCO, 2006c:2). Several themes describe creative tourism, including active participation, authentic experiences, creative potential and cultural and destination interaction (OECD, 2014:3; Richards, 2009a:6, 2011:1237; Richards & Raymond, 2000:18). Creative tourism is therefore defined as tourism that offers participative (active) and authentic learning experiences through contact with local people, cultures and the destination that enables the development of 'creative potential and skills' (Richards, 2011:1237; Richards & Raymond, 2000:18). Additionally, the creative tourist is someone who is actively involved in the co-creation or co-production of their own creative experiences or creativity (Richards, 2009a:4; Tan *et al.,* 2014:248-249).

1.6.3 The video gaming industry

There are two approaches to defining the video gaming industry. The first examines a generalised international perspective of the video gaming industry and the second is based on the South African approach.

- **The international definition of the video gaming industry**

Traditionally, the video gaming industry is divided into two sectors, namely the hardware sector and the software sector (Daidj, 2015:269). The hardware sector consists of consoles and accompanying accessories and peripherals, while the software sector involves retail and digital game sales and all other digital sales related to video games (Hollingworth, 2014:internet; Morris, 2015:internet). However, the operations of the video gaming industry extend to more than two sectors. According to IBISWord (2016:internet), there are six components, namely retail (sale of games and consoles), development and manufacturing (manufacturing of accessories, consoles and peripherals), revenues (from online subscriptions, transactions and downloads), online gaming and eSports, licensing and merchandise, advertising, and video game events. A new entry or a seventh component can include video games played on mobile, handheld or Smartphone devices (Newzoo, 2014a:3).

- **South African definition of the video gaming industry**

The South African Video industry is measured by consumer spending on video game software and devices across traditional and social/casual gaming, including revenues from advertising via video games and online/micro transaction revenues (PwC, 2015a:116). This does not comprise any hardware, devices or gaming accessory sales. Traditional game revenues consist of proceeds (retail and digital game sales, subscription services and additional DLC sales) associated with playing games on PCs, gaming consoles and dedicated handheld devices (PwC, 2015a:116). Social/casual gaming revenues consist of consumer-spending on app-based games on mobile phones and handheld devices (tablets), including browser games (PwC, 2015a:116). Video game advertising is only measured by static advertising –advertising with set conditions for banners, which does not change - and not dynamic advertising, such as those displayed alongside the game in an app or browser game (PwC, 2015a:116).

1.6.4 Video game

Video games are first and foremost a game (Wardrip-Fruin & Harrigan, 2004:85). To understand video games one should first understand the games (Wardrip-Fruin & Harrigan, 2004:85). This in itself is, however, very difficult to explain since there are numerous

definitions describing what constitutes a game (Esposito, 2005:2). For the purpose of simplification, a game is defined as a formal system in which a player or players are engaged with quantifiable outcomes and where effort/strategies are exerted to influence the outcomes within the boundaries of rules (Salen & Zimmerman, 2003:96; Von Neumann & Morgenstern, 1944:49). A video game is an extension to this definition, but is played using an audio-visual apparatus (Esposito, 2005:1). A more simplified definition of a video game involves it being 'a game in which the player controls moving pictures on a screen by pressing buttons' (Cambridge Dictionary, 2018:internet).

1.6.5 Gamers

The term gamer, also known a video game player, is often used to describe people who play video games (Shaw, 2011:29). Remarkably, only a portion of people who play games consider themselves to be gamers (De Grove, Couttois & Van Looy, 2015:346). According to Shaw (2011:30) ‘labelling everyone who plays video games as a gamer’ is a misguided approach and goes on by saying that how people identify themselves as gamers is different from who counts as being a gamer. However, a distinct player-related phenomenon can be used to categorise gamers (Dixon, 2011:2). Richard A. Bartle (1996:1), a British writer and gamer researcher, developed such a model for online gamers by means of which he categorises them into four categories, namely: achievers, explorers, socialisers and killers. Similarly, Kabrick (2013:internet) identified four categories as a descriptive approach to identify gamers, namely casual, social, specialist and expert gamers. Regardless, for the purpose of this study, a more traditional and widely recognised approach for categorising gamers will be used to define gamers, namely casual gamers and hard-core gamers (Juul, 2010:8). Casual gamers play video games as a means to socialise, connect with friends or have positive and pleasant experiences (Urban dictionary, 2016a:internet). They do not devote considerable time and resources to playing games, and dislike overcomplicated or difficult games (Juul, 2010:8). Hard-core gamers, on the other hand, play a large number of video games, are skilled video game players, invest large amounts of time and resources in video games and enjoy the challenge/difficulty presented by games (Juul, 2010:8). In addition, hard-core gamers also consider video games a primary hobby (Urban dictionary, 2016b:internet).

1.6.6 Event management

Event management refers to 'the way in which an organisation deals with events’ (Bhe, Glasmacher, Meckwood, Pereira & Wallace, 2004:4). It is a professional field devoted to understanding and improving the management of planned events (Getz & Page, 2016:595). Planned events within tourism are purposefully created to provide value and attractiveness

to a destination (Batta, 2000:59). The function of event management is to 'manage or control event resources on a given activity, within time, cost and performance requirements' (Tassiopoulos, 2000:40). This includes activities such as planning, leading, marketing, designing, budgeting and controlling, risk management, logistics, staging and evaluating (Allen, O'Toole, Harris & McDonnell, 2005:160). Therefore, event management can be seen as encompassing the practical aspects when preparing and hosting events (Page & Connell, 2009:642).

1.6.7 Assessment

Assessments are based on information gathered and occur whenever some kind of interaction, direct or indirect, takes place where one consciously obtains and interprets information based on that encounter (Rowntree, 1977:4). Huba and Freed (2001:8) describe an assessment as 'the process of gathering and discussing information from multiple and diverse sources to develop a deep understanding of what students know, understand, and can do with their knowledge as a result of their educational experiences; the process culminates when assessment results are used to improve subsequent learning.' Maki (2004:4) adds that an assessment is a collective institutional process of inquiry that explores multiple sources. To make an assessment work, the data should be purposefully collected based on clear goals and objectives (Macalester College, 2015:internet). Several tools are available that one can use to make assessments including qualitative and quantitative research approaches (Macalester College, 2015:internet). For purposes of this study both a qualitative and quantitative research approach was followed to determine supply and demand-side perspectives on video gaming events.

1.6.8 Supply and demand-side analysis

Events should be evaluated based on critical success factors from the perspectives of both the event manager (supply-side) and the visitor (demand side) (Singh, 2009:243). Tassiopoulos (2010:28) asserts that both sides should be taken into consideration by event management when planning events. Within the event tourism industry a symbiotic interest exists between demand- and supply side since event managers seek successful events, attendees expect memorable experiences and entertainers want to make profits (Ryan, 2012:255). A demand-side analysis in events enables organisers to assess the needs of the visitors or to assess resources available from a demand perspective to meet visitor expectations (Sonder, 2004:81-82). A supply-side analysis in events identifies the various reasons for events being hosted (Saayman, 2004:152), audiences targeted (Saayman, 2004:153) and most importantly the critical success factors that need to be managed for hosting successful events (Allen *et al*., 2005:160; Matthews, 2008:151; Silvers, 2004:41).

Thus the success of an event relies on doing both a supply and demand-side analysis as it enables matching visitor experiences and expectations with services and product offerings (Pegg & Patterson, 2010:86).

1.6.9 Critical success factors

When a factor is considered critical, it is an indication of high importance or priority (Brotherton & Shaw, 1996:114). Critical success factors are seen as those factors that affect one's ability to strive in the market place (Slabbert & Saayman, 2003:8). They are considered aspects of strategy in which an organisation needs to excel to have a competitive advantage and are core competencies in specific activities (Tembo, 2014:75). These factors could spell the difference between profit and loss, ranging from company strategies, product attributes, capital, competitiveness, and competencies to perceived business outcomes (Slabbert & Saayman, 2003:8). The manner or extent to which they are achieved will ultimately determine the success of a company (Brotherton & Shaw, 1996:114) or in this case video gaming events.

1.6.10 rAge (really Awesome gaming expo) Expo

The rAge Expo is South Africa's largest annual video gaming, computer, technology and 'geek' culture exhibition (rAge Expo, 2016b:internet, 2016c:internet). Since its inception in 2002, the Expo has experienced organic growth in both attendee and exhibitor numbers (Meyer, 2010:internet). The 2017 rAge Expo saw 35 845 visitors and hosted 130 exhibitors (rAge Expo, 2017:internet). The Expo has also won numerous consumer expo awards, including the Gold Award for Best Exhibition in the Consumer Exhibition at the EXSA (Exhibition & Event Association of Southern Africa) Awards (rAge Expo, 2015:internet). The Expo takes place at the Tickepro dome in Northgate Johannesburg over a course of 3 days (weekend) in October. The event hosts numerous gaming and 'geek' culture-related exhibitions, activities and products. This includes video game and gadget demonstration booths, gaming competitions and tournaments, gaming hardware and software retail, overclocking activities, local game development studios, international game developers, comic book and 'geek' merchandise retail, local area network (LAN) opportunities, anime artists and graphic art signings, cosplay opportunities and competitions (people dressing up as their favourite fantasy characters), table-top games and collectible card games (Magic: The Gathering, Pokémon etc.), digital lifestyle gear (micro drones, virtual reality headsets, 3D printing and gadgets), and food and drink stalls, to name a few (rAge Expo, 2016c:internet).

1.7 Chapter classification

This study comprises five chapters. The following section includes a brief outline of what the reader can expect from each of the chapters.

- **Chapter 1: Introduction, background to the problem, problem statement, goals and objectives and method of research**

This chapter serves as the introduction to the research study and provides an outline of the problem at hand, as well as the steps to be taken to solve the problem. Included in this chapter are the introduction, background to the problem, problem statement, goal and objectives of the study, research methodology, and important definitions relevant to the study.

- **Chapter 2: An analysis of the creative industries**

Chapter two serves as a theoretical analysis of the creative industries. A literature analysis was performed on the creative economy, cultural industry, cultural and creative tourism and creative industries. Cultural and creative tourism was examined as individual topics and from a name-change perspective (from cultural tourism to creative tourism). The cultural industry was explored from an evolution of terminology and a characteristic point of view. The creative industries were examined from a change in reference perspective (from cultural industries to creative industries). Further discussion followed an examination of expressive and physical artefact values in creative industries, models of cultural/creative industries, geography of creative industries, creative industries in developed and developing countries, and their role in South Africa.

- **Chapter 3: A literature analysis of exhibition management and events**

Chapter three served to provide a critical overview of event management, planned events in tourism and the MICE sector from an exhibitions approach. Event management was examined by definition, previous research, context within tourism and according to careers, stakeholders, and buyers and suppliers of events. An examination of planned events included classification, size and scale aspects, and benefits to a destination and visitors. Literature on the meetings, incentives, conferences, and events (MICE) sector and Exhibitions were consulted to provide a discussion on exhibition classification, management, benefits, previous research from a supply and demand side, and previous research done on South Africa.

- **Chapter 4: A literature analysis of the video gaming industry**

Chapter 4 serves as a theoretical analysis of the video gaming industry and its evolution. Concerning its evolution, literature examinations were done to define and explain video games, the origins of video games, how the video gaming industry started, current state of the industry and predicted future trends. The video gaming industry is also examined by value chain. Further examinations done in this chapter include the profiling of gamers, gaming behaviours and motives for playing video games. Lastly, an examination is done on the South African video gaming Industry.

- **Chapter 5: Method of research, multivariate analysis and results**

This chapter was divided into two sections, the first (Section A) assessing video gaming events from a demand side and the second (Section B) assessing video gaming events from a supply side. Section A describes the research methodology followed to conduct the visitor's questionnaires survey at the rAge Expo in Johannesburg. The results were presented using both descriptive and exploratory research approaches. A descriptive analysis was done to profile attendees according to demographics, gaming and purchase behaviours and on event-related aspects. Exploratory research was done to segment attendees based on motives for playing video games and motives for attending the rAge Expo. Statistical techniques were then employed to draw a comparison between the market segments. Section B, on the other hand, describes the research methodology followed to conduct the interviews with gaming event organisers. Eight participants partook in the interviews, of which five categories containing themes and subthemes were identified as important findings from a supply side.

- **Chapter 6: Conclusion and recommendations**

Chapter 6 serves as the conclusion to the study. Conclusions were drawn from the literature analyses and the empirical results by which an assessment was made of video gaming events as part of the creative industries, and its contribution to creative tourism in South Africa. The assessment served as recommendations from this study and assists in filling the gap in current demand- and supply-side research on video gaming literature. Furthermore, the assessment contributes to the future development of video game events and the video gaming industry. Recommendations are also made regarding future research originating from this study.

Chapter 2: An analysis of the creative industries

2.1 Introduction

Cultural and creative industries generate US$2,250b of revenue and 29.5 million jobs worldwide with an economy worth 3% of the world's gross domestic product (GDP) (Ernst & Young [EY], 2015:8). The products of these industries are not mere amenities but a pervasion of contemporary life and lifestyles (BOP Consulting, 2010:11). Yet 20 years ago, the term 'creative industries' was barely known (BOP Consulting, 2010:11). Many a public media and economic communities nowadays use the terms 'creative economy', 'cultural industry' and 'creative industry' interchangeably (He, 2014:10). As a form of academic inquiry, however, they are occasionally approached separately (He, 2014:10). The term 'creative economy' was first used to characterise the modern economy as an economy that relies on intellectual property in John Howkins' (2001) book 'The Creative Economy: How People Make Money from Ideas'. The term was later adapted by the United Nations Conference on Trade and Development (United Nations Conference on Trade and Development [UNCTAD], 2008:4) as a holistic concept that deals with interactions between culture, technology and economics in a contemporary world globalised by symbols, text, images, and sounds. The significance of the creative economy is closely reflected by the cultural and creative industries (Boccella & Salerno, 2016:292). This is because knowledge-based economic activities in the creative economy attach greater value and desire on expressive content in goods and services found in the cultural and creative industries (Policy Research Group, 2013:3).

The boundaries for separating the cultural and creative industries, however, is much vaguer or imprecisely defined (see Moore, 2014:741; The Work Foundation, 2007:103; United Nations Educational, Scientific and Cultural Organization [UNESCO], 2015a:internet). On the one hand 'creative industries' is considered a sub-term of cultural industries as a result of non-profit social and cultural output produced by the cultural industries (see the European Society's categorisation, as cited by Marcus, 2005:3), while on the other hand, the creative industry is a broader concept of the cultural industry. The latter, however, is considered the more acceptable approach and can be seen in the Singapore Model of Creative Industries, established in 2003 by the Singapore Ministry of Trade and Industry (MTI, 2003:52). The model as illustrated in Figure 2.1 shows that copyright industries comprises both creative and cultural industries and their associated distribution industries - industries associated with the wholesale, retail and distribution of creative products and services (MTI, 2003:52).

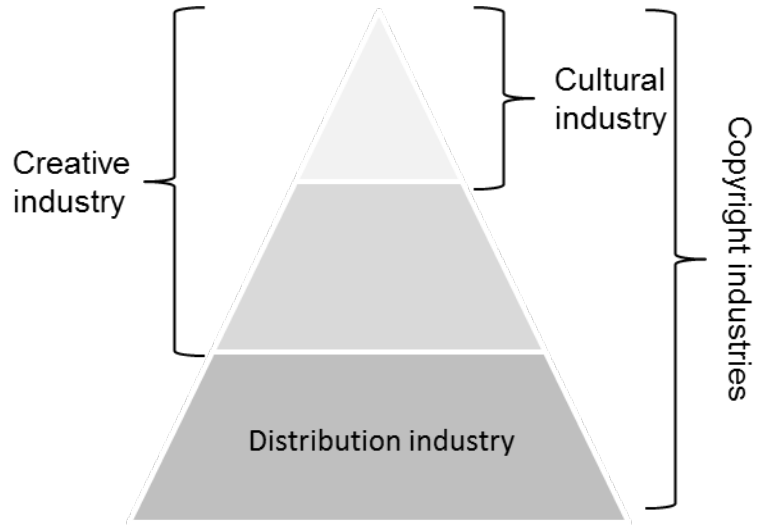

Figure 2.1: Creative Industries model of Singapore
Source: Adapted from MTI (2003)

Differences aside, 'creative industries' in general represents a cycle of creation, production and distribution of goods and services where creativity and intellectual capital form the primary input (UNCTAD, 2008:4). Similarly, the cultural industries represent a combination of creation, production and commercialisation of tangible and intangible culture-based content (UNESCO, 2006a:3). UNESCO (as cited by EY, 2015:11) see both industries as those 'whose principal purpose is production or reproduction, promotion, distribution or commercialisation of goods, services and activities of a cultural, artistic or heritage-related nature.' The activities for both industries are vast and various, including sectors such as advertising, architecture, books, music, movies, newspapers and magazines, performing arts, radio, television, visual arts and gaming (video games) (EY, 2015:8).

A global map of cultural and creative industries in 2013 revealed that the video gaming industry made more than the movies, music and radio industry in revenues and was the 8th highest cultural and creative industry in revenues in the world (EY, 2015:15). The video gaming sector is also said to be one of the fastest growing creative industries in the world which is true for South Africa as well (Mcilhone, 2017:internet). Seeing that the video gaming sector is part of both the cultural and creative industries and a primary focus area of this study, it is important to understand these industries and the role they play in tourism and social and economic development. Therefore, the purpose of this chapter is to provide a detailed examination of the creative economy, cultural industry, and creative industry. Firstly, the creative economy is examined followed by a review of cultural and creative tourism. Secondly, a thorough investigation of cultural industries is done concerning its history, evolution, and characteristics. Thirdly, the transitioning of cultural industries to creative

industries is explored, followed by a detailed analysis of the creative industry and its related models. Lastly, the creative industries are analysed from a South African perspective, including the current state of the video gaming industry in the country.

2.2. The creative economy

The transitioning of economies based on the production of goods towards knowledge economies based on information and knowledge gave rise to the creative economy (Policy Research Group, 2013:3). Traditionally, knowledge economies are those 'which are directly based on the production, distribution, and use of knowledge and information.' (Organisation for Economic Co-operation and Development [OECD], 1996:7). When a greater emphasises was placed on expressive content in services and goods it 'spurred the evolution of the concept of the knowledge economy into that of the creative economy' (Policy Research Group, 2013:3).

In the present day the creative economy functions as a means to revitalise manufacturing, service delivery, and retail by using expressive content in various entertainment industries (music, film, television and video games for example) (Policy Research Group, 2013:3). However, the term 'creative economy' was first introduced by the UK's Department of Culture, Media and Sport (DCMS) in 1998 as an economy based on 'those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property' (DCMS, 1998:3). In 2001, Howkins defined the creative economy as 'the transactions of creative products that have an economic good or service that results from creativity and has the economic value' (Howkins, 2001:8). The potential to generate economic growth and development through constantly developing new creative assets makes the creative economy an evolving concept (UNCTAD, 2008:15). By combining the work of several authors (Gibson, 2001; Hesmondhalgh, 2002, 2007a, 2007b; Hawkins, 1993; Howkins, 2001) and industry-based organisations and departments (DCMS, 1998; UNCTAD, 2008) the creative economy can be characterised as:

- an economy that relies on creative industries for its success;
- an economy that embraces economic, cultural and social interaction between technology, intellectual property, and tourism;
- an economy that fosters job creation, income generation, and export earnings while promoting human development and cultural diversity;
- a set of knowledge-based economic activities that can link micro and macro levels of the economy; and

- a tool used for inter-ministerial action, multidisciplinary policy and innovation development.

At the centre of the creative economy lies the cultural and creative industry (Policy Research Group, 2013:3). Cultural industries are those activities that deal in goods of which primary economic value is derived from their cultural value (O'Conner, 2000:19). Although cultural goods and cultural industries have been around for quite some time, creative industries were only first introduced in the 1990s as an alternative approach to the revitalisation of economies through culture (O'Conner, 2011:24). In fact, the concept was documented in the then new cultural policy 'Creative Nation' by the Australian government in 1994 (Moore, 2014:739). The policy was aimed at creating new information technology (IT) opportunities and to grow a wave of global culture enabled by digital media (Moore, 2014:739). Particular emphasis was placed on the economic value of cultural activities and arts (Moore, 2014:739). In 1997, the newly elected 'New Labour' party in Britain renamed 'cultural industries' to 'creative industries' (c.f. 2.4.1). The party started to articulate the creative industries with 'new labour' to promote economic development (Eisenberg, Gerlach & Handke, 2006:7; Moore, 2014:739).

Today, creative industries are well-known as significant contributors to economic growth OECD, 2014:15). As the significance of the creative economy expanded from creative industries, important synergies with tourism started to emerge, presenting new potential demand, products, experiences, and markets (OECD, 2014a:3). The relationship between culture and tourism has always been one with a long history, so it was inevitable that new links would develop from the expanding creative industry. These new links are driving a shift from conventional models of cultural tourism to new models of creative tourism based on creativity and intangible culture (OECD, 2014b:52).

2.3. Cultural tourism and creative tourism

The use of culture and creative content in producing many different tourism products and experiences has become a necessity for modern tourism growth (OECD, 2014a:52). Since the creative economy is linked to both creative and cultural industries (Boccella & Salerno, 2016:292), it has offered many new opportunities for creative and cultural tourism development and marketing (OECD, 2014a:52). Having said this, an investigation into both types of tourism can provide a better understanding of the mutually beneficial relationship the industries have with one another.

2.3.1. Cultural tourism

Cultural tourism has been arguably one of the most influential sectors of global tourism for more than the last two decades (Richards & Wilson, 2006:1209). Cultural tourism is also one of the earliest forms of tourism dating back to pilgrimages and expeditions undertaken by ancient Greeks and Romans for educational or learning purposes (Von Rohrscheidt, 2008:40-41). The driving force behind modern-day cultural tourism, however, has mostly to do with a need for new and different cultural experiences, coupled with the rise in education levels (tourists making more informed decisions) and the ease of accessibility (global transport network) (Richards, 2012:3). Modern cultural tourism also spiked new interests in traditional or conventional cultural industries such as monuments and museums, art and craft galleries, theatre performances and heritage sites (Richards, 2012:3). Cultural attractions, in particular, have become very important for modern-day pilgrimages (Richards, 2001:3).

A core function and assets of cultural tourism is to conserve and build heritage, while the core assets of creative industries related to tourism are knowledge, skill, and creativity (OECD, 2014a:52). Increased interest in commercialising culture over recent years, however, has shifted the focus of conservation to innovation; hence the emergence of creative tourism (OECD, 2014a:52). The shift from cultural tourism to creative tourism is one that is more suited to modern social and economic structures (Richards, 2012:5).

2.3.2. From cultural tourism to creative tourism

Unlike the well-developed relationship between culture and tourism, the development of continuously new creative activities only adds to new creative tourism experiences (OECD, 2014a:52). The more creative activities are developed to match the fragmented postmodern lifestyles of tourists, the greater the shift from cultural tourism to creative tourism becomes (Jelinčić, 2009:260). In many ways, the shift is an evolution of cultural tourism towards providing better authentic experiences for different types of lifestyles (D'Auria, 2009:279). In its traditional form, cultural tourism involves an exchange of culture and heritage, whereas in its evolutionary form (creative tourism) it is more socially, relationally and intellectually flexible (Richards, 2012:5). The shift also changes how information is provided, moving away from the interpretation of culture towards 'collaboration with the consumer through 'co-creation' of knowledge' (OECD, 2014a:52). Knowledge is a critical aspect in this regard since many modern-day tourists are said to be better educated and more affluent (see Richards, 2000:9). The availability of knowledge (such as doing a Google Search) allows one to find or create new experiences that are different from the monotonous supply of mass tourism products. As opposed to mass tourism which focuses on fulfilling mass conventional

tourism needs (sea, sand, and sun tourism), cultural and creative tourism focuses on the small but particular demands for culture and art (Jelinčić, 2009:260).

Tourists who act on cultural and creative tourism demands do not expect passive holiday experiences but seek to develop their own interests actively and enrich existing knowledge related to culture and diversities (Jelinčić, 2009:260). The term 'creative tourism' was coined by Richards and Raymond (2000:18) to summarise tourists who travelled for culture and art in the hope of finding cultural and creative enrichment.

2.3.3. Creative tourism

As previously mentioned (c.f. 1.1), many cities use creative industries to attract creative tourists and to establish themselves on the tourism map (Richards, 2012:3). Many governments do the same for culture and tourism to attract an international flow of capital (Clemente, 2002:252; Richards, 2001:3). Culture is implemented in many ways to progress urban transformation processes (Clemente, 2002:251-252). Examples of this include actions such as purposefully building graffiti walls, community recreation centres and craft workshops for troubled youth or youth at risk. In creative tourism, cultural industries and creative industries serve as an intermediary that connects tourists with a destination's culture and creativity (Richards, 2012:3-5). Tourists can improve their cultural knowledge and creative potential when they participate in these destination-related activities (active learning experiences) (Jelinčić, 2009:263). Participation in cultural and creative activities allows creative tourism to take place, but how do we define creative tourism?

Richards and Raymond (2000:18) first defined creative tourism as:

> Tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences which are characteristic of the holiday destination where they are undertaken.

By studying the City of Santa Fe, New Mexico as a creative city, UNESCO's Creative Cities Network later adapted the concept and defined the concept as follows (UNESCO, 2006c:3):

> Creative tourism is travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture.

Another definition by Raymond (2007:145), based on new experiences, related the development of creative tourism in New Zealand to:

> …a more sustainable form of tourism that provides an authentic feel for a local culture through informal, hands-on workshops and creative experiences. Workshops take place in small groups at tutors' homes and places of work; they allow visitors to explore their creativity while getting closer to local people.

Looking from a destination perspective, creative tourism can be seen as (Richards, 2012:4):

- A means of involving tourists in a destination's creative life/lifestyle;
- A means of using existing resources creatively;
- A means of strengthening the identity and distinctiveness of a destination;
- A means of edutainment (self-realisation and education);
- A source of ambience/atmosphere for destinations and places; and
- A means to recreate or revive a destination.

It is evident that although creative tourism is an evolutionary concept, several themes remain central to its definition such as providing tourists with opportunities for authentic experiences and opportunities to develop creative skills and knowledge through interactions with local communities, culture, and art. The 'creative-base' acts as an intermediary in providing opportunities/activities with authentic experiences (see Richards & Wilson 2006:1219). The 'creative-base' consists of the combined efforts of several role-players including arts and crafts, design, cookery, gastronomy, and wine-making, health and healing, language, spirituality, nature and landscape, sports and pastimes (Richards, 2010:4; Richards & Wilson 2006:1219). The measure to which tourists participate in these activities can range from active to passive, requiring different levels of creativity to perform (Richards, 2011:1239). The level of creative involvement shift from passive to more active involvement as one moves from background activities to more direct creativity activities (see Figure 2.2) (Landry, 2010:37). These different modes of creative tourism can be seen illustrated in Figure 2.2 and will consequently be discussed.

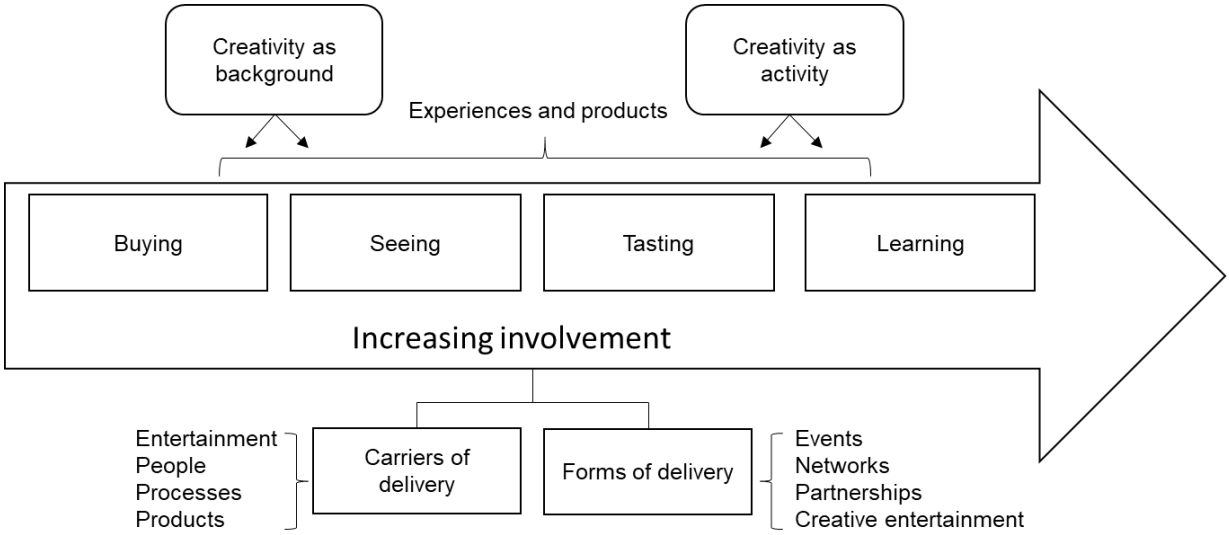

Figure 2.2: Modes of creative tourism
Source: Adapted from Richards (2011:1239; 2012:4)

Background activities are seen as ordinary activities 'like seeing people go to work, waiting in a queue to catch a bus, standing outside the office and smoking, buying a drink or a sandwich, chatting on the sidewalks, or watching young lovers kiss and cuddle on a bench' (Landry, 2010:37). These activities might seem trivial, but they can add a sense of place, identity and atmosphere to those who are not accustomed to this everyday way of life (Richards, 2009b:84). *Direct creative activities*, on the other hand, refers to creativity as the activity and involves active/non-passive tourist participation (Richards, 2011:1238). These activities are particular to the 'creative base'. Good synergy between creative and non-creative activities can also play a vital role in providing tourists with the opportunity of 'get(ting) under the skin' of a destination (Landry, 2010:37). Take for example ATMs or public toilets near attractions or heritage sites, they may be ordinary facilities, but their ease and access can contribute to a better experience when needed.

According to Tan, Kung and Luh (2012:167), activities such as workshops, cultural events and dances, local gastronomy, museums and art galleries all are opportunities that actively involve tourists in learning and developing new and creative skills (Tan *et al*., 2012:167). Activities that allow for active participation is closely linked to the learning and interacting process of creative tourism (Tan *et al*., 2012:167). Tourists can learn and interact with creative activities through various carriers of creativity, namely the environment (sculpture, buildings, infrastructure, mood, ambience etc.), people (artists, actors, musicians etc.), processes (the production of creative spaces, attractive atmosphere, art, music etc.) and products (artworks, music, movies, souvenirs etc.) (Richards, 2011:1239; Richards &

Marques, 2012:4; Richards & Wilson, 2006:1213). Creative tourism can also be experienced through different forms of delivery ranging from events, networks, partnerships and creative entertainment:

- Firstly, creative events can be anything from festivals, carnivals, art symposia and gallery openings, and bazaars, to local music concerts (King, s.a.:9-10). Events attract attention and provide great opportunities for different cultural and creative interaction all in one place (Richards, 2010:7).
- Secondly, networks are seen as the conduits of exchange within different types of capital (economic, cultural, social and relational capital) between individuals and groups (Richards & Marques, 2012:4). In creative tourism, networks are used as a means to increase social and relational capital for both the tourist and local provider (Richards & Marques, 2012:4).
- Thirdly, many creative programmes in cities require the development of partnerships between different stakeholders (Richards, 2010:7). This includes partnerships with event-driven cultural institutions, local independent associations and groups, business and tourism sectors, and social services/community organisations (Richards, 2010:7). Partnerships between organisations can aid in the sharing of resources and assets such as facilities, while others can assist by increasing or improving creative tourism facilities that can attract and accommodate more tourists (Richards & Wilson, 2007:32). Partnerships may also allow partners to promote or assist in promoting one another's assets (Richards & Wilson, 2007:26). An example will be a bar employing a local street artist to perform during happy hour. The live entertainment adds to the 'vibe' of the bar and attracts more clients, while the street artist is afforded the opportunity of performing for a larger crowd and of promoting him/herself.
- Lastly, creative entertainment and the most common form of creative delivery is directly linked to the delivery of theatrical and technical live entertainment (Richards, 2009b:84-88). This includes anything from live theatrical plays, bands or local street musician performances to artists painting or sculpting. The responsibility remains with destination stakeholders to become more creative when designing and delivering creative entertainment and opportunities (Richards & Raymond, 2000:18).

When summarising the modes of creative tourism, ranging from creative activities and carriers of creative activities to forms of delivery, it is evident that creative tourism cannot take place without the intervention of the creative industries. The types of interaction the tourist has with these industries determine the manner in which creative tourism takes place

(Landry, 2010:37; Richards, 2012:4). Therefore, it is important to understand these industries as they are the cruxes of creative tourism. The following sections provide a thorough examination of the culture and creative industries, starting with the cultural industry and its shift to the more modern creative industries.

2.4. The culture industry

This section covers the cultural industry, its history and evolution, and its characteristics. A timeline is compiled by the researcher by means of a literature analysis of the cultural industry, while the characteristics are examined by using themes that differentiate between cultural industries and other industries in the business economy.

2.4.1. The evolution of cultural industries

Culture is a way of life; it is the custom and beliefs of different types of people and civilisations at particular moments in time (Cambridge English Dictionary, 2016:internet). With every new culture came new and different commodities. It was not until the development of reproduction technologies (digitalisation) that drastic acceleration took place in the production, reproduction and economic awareness of these commodities (O'Conner, 2007:7). The age of digitalisation has also allowed cultural commodities to be used as tools for urban development (creative cities) (UNESCO Creative Cities Network [UCCN], 2016:internet), media development (Frau-Meigs, 2013:9), tourism development (O'Connor, 2000:15; Richards, 2012:3) and economic development (O'Connor, 2000:15). Alas, those who dealt with cultural commodities in the past were not always considered being part of the cultural industries and did not receive the same recognition for their economic contribution. The reason being that the term was only first introduced in the 1940s, which at the time was still a very unfamiliar concept (Moore, 2014:741). A historical overview of the 'cultural industry' is to follow with Figure 2.3 illustrating significant dates in its evolution.

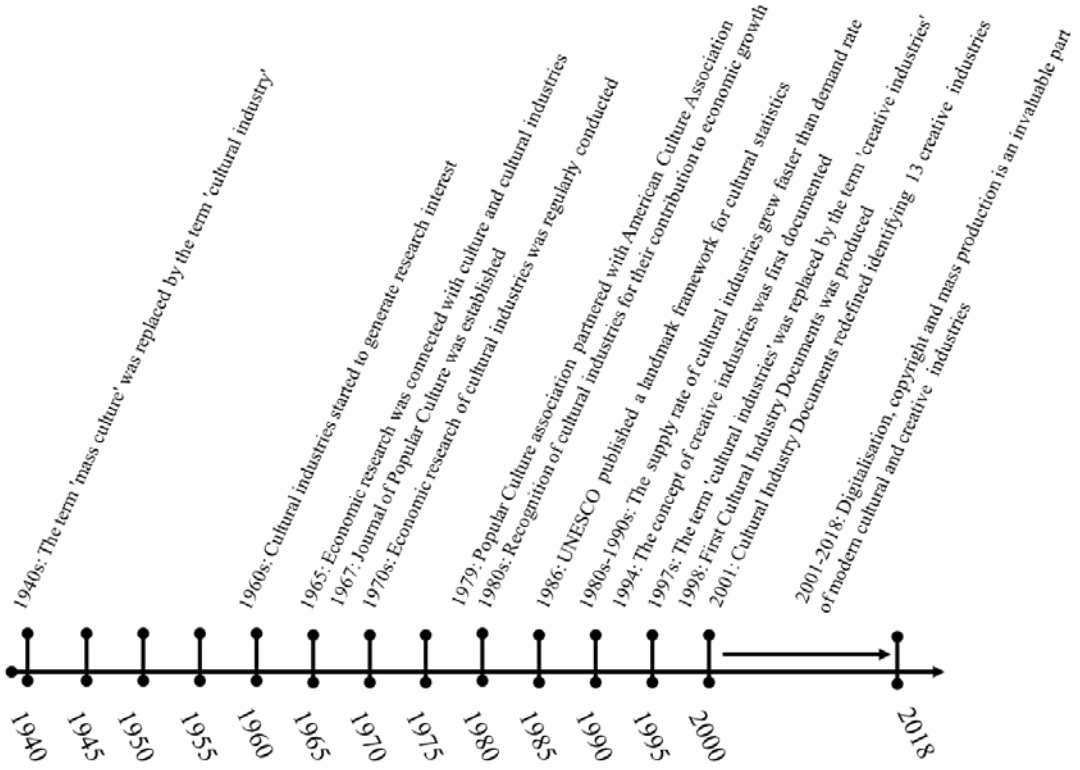

Figure 2.3: The evolution of cultural industries
Source: Researcher's own compilation

- **The 1940s**

Max Horkheimer and Theodor W Adorno first used the term 'cultural industry' in 1944 in the book 'Dialectic of enlightenment: Philosophical fragments' where 'mass culture' was replaced by the term 'cultural industry'. According to Adorno, mass culture does not come from the masses – it is produced for the masses (Moore, 2014:741). At the time, the term 'culture', when referring to the 'cultural industry', was seen as the German idealist notion of culture (Garnham, 2005:17). The term 'industry' however referred to both the Marxist economic concept of commoditisation (assigning things economic value which they did not previously possess) and the Weberian concept of rationalisation (the process of replacing traditional and emotional thoughts with reason and practicality) (Garnham, 2005:17). The concept was later introduced as the commercialisation of culture (culture from the elite/mass or with a superstructure distinction) and referred to the standardisation of culture (Moore, 2014:741). As the ideology behind the term changed over time, the meaning of the term shifted towards the commodification of cultural products, changing the role of cultural producers into wage labourers (Garnham, 2005:17). During this period, the meaning of the term also focused more on the relationship between culture and politics than that of culture and economics (O'Conner, 2011:24). Despite having an origin of critical theory, the term

‘creative industry’ always linked culture and industry, explaining the notion of cultural production in a capitalistic society (Moore, 2014:741).

- **1960s**

Before the 1960s, cultural industries did not generate any other or much special academic interest (UNESCO, 2009:8). The 1950s merely saw the record-keeping of attendance and finance of several performing arts organisations, which Larson (1983:143) referred to as nothing more than ‘culture-counting’ exercises. This lack of interest was the result of several factors (UNESCO, 2009:8):

  - The absence or lack thereof of long-term statistical data on cultural industries due to it being new and unfamiliar phenomena;
  - Underdeveloped measurement approaches to adequately analyse the economic value of the cultural industries domain;
  - The unsystematic relation that existed between cultural industries and the economy;
  - The perception that an economic analysis of cultural industries does not correspond with the nature of culture since culture and cultural industries were seen as expressionistic, aesthetic and spiritual activities; and
  - A lack of investment potential due to the traditional perception that cultural industries were a public good and the financing of cultural activities was a matter of government consumption.

This all changed in 1965 when Baumol and Bowen wrote a paper, ‘On performing arts: An anatomy of their economic problems’, connecting economic research with culture and cultural industries. A year later the authors published a book titled ‘Performing Arts: The economic dilemma’. The book analysed the economic position of performing arts in the United States and focused on performing art organisations, with topics ranging from art event attendances to prices of Metropolitan Opera tickets. The book also addressed the problem of the ‘cost disease’ - ‘the lack of productivity gains in the performing arts, which results in ever-rising costs’ (Besharov, 2005:413). Baumol and Bowen (as cited by Besharov, 2005:414) documented that income from sales at art organisations often fell short of costs but was occasionally recovered by way of using private and public contributions. The significance of Baumol and Bowen’s work got them widely accredited for having begun this area of inquiry, formally known as the ‘cultural economics’ or ‘economics of the arts’ (Besharov, 2005:414). A statement by Frey (2000:3) suggests the same notion, saying: ‘The

birth of art economics as a discipline of its own within modern economic science can be dated exactly: it occurred with Baumol and Bowen's book.'

Two years later (1967) the *Journal of Popular Culture* was established by Ray B. Browne at Bowling Green State University in Ohio (Browne, 2004:190). The journal was an important publication outlet for research related to cultural studies which at the time was a combination of folklore and American studies (Browne, 2004:190). The journal included the work done by Baumol and Bowen and ignited new interest in the area of 'cultural economics' (Browne, 2004:190).

- **1970s**

Research published in the *Journal of Popular Culture* was later embedded in the Popular Culture Association (PCA), founded in 1970 by Ray B Browne, Russel B Nye, Marshall W Fishwick, Carl Bode, John Cawelti and several other members (Browne, 2004:190). The Association's first meeting was held in 1971 at Michigan State University (PCA/ACA, 2014:internet). The Association focused on folklore and the popular cultures of ordinary people, as well as outputs related to cultural industries and mass media (Browne, 2004:190). The term 'the cultural industries' can also have its roots as a major object of academic and policy traced back to the early 1970s (O'Conner, 2011:24). By the mid-1970s, economic research studies on cultural industries were regularly conducted in the United States to support arguments for the state to further finance culture, education, and science (UNESCO, 2009:8). In 1979 the PCA partnered with the American Culture Association (ACA) in supporting studies of popular and American culture, of which several joint conferences were held before the cohesion (PCA/ACA, 2014:internet).

- **1980s-1990s**

The growing threats of budgetary cuts in the 1980s was a turning point in fully recognising cultural industries' potential to contribute to economic growth (O'Connor, 2000:15). At the time they were considered a 'new' fundamental part in transforming the economy through tourism (O'Connor, 2000:15; Richards, 2012:3). The 80s and 90s saw the supply rate of cultural industries surpass their demand due to nations, regions, and cities wanting to establish themselves on the tourism map (Richards, 2012:3). The supply rate was driven by globally expanding industries involved in the production of cultural commodities (e.g. technological reproduction, commodity reproduction, and communication and media industries) (O'Connor, 2007:11).

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- **21st Century to present**

By the 21st century the growing profile of culture and cultural commodities in cities expanded beyond strictly economic growth to a more instrumental part, becoming tools of advocacy in solving urban and regional issues (e.g. lack of social cohesion, unemployment and poor education) and globally related problems (e.g. intellectual property issues) (UNESCO, 2009:9). Unfortunately, growing culture and cultural commodities in cities also spurred a superficial consumption of culture, where the image of participating in urban culture was more important than the content consumed (Towner, 1985:301; Zukin, 2011:163-164). The 21st century also brought forth an age of digitalisation and digital culture, in other words, media and information technology started playing a vital role in how the image and identity of urban culture was perceived (Richards, 2012:3).

Nowadays, digitalisation is an invaluable part of cultural industries, playing an essential role in the reproduction of intangible creative and expressive content (O'Connor, 2007:7; The Work Foundation, 2007:103; UNESCO, 2015:1). Fortunately, this has not changed the cultural nature of content produced by cultural industries (O'Connor, 2007:7). Modern definitions of 'cultural industries' see them as those industries or activities involved in the mass reproduction of expressive outputs or symbols that are based on copyright (Moore, 2014:741; UNESCO, 2015:1). Media with expressive output include printing, publishing, multimedia, television and film, music and audio-visual, radio, computer design and video games (The Work Foundation, 2007:103; UNESCO, 2015:1). Media with expressive and symbolic value point towards media in general and digital media in particular (UNESCO, 2015:1). It is the characteristics of the expressive value produced by these industries that sets them apart from other production or trade industries within the global economy.

2.4.2. Characteristics of the cultural industry

Despite enjoying increasing popularity among scholars and industry leaders, the subject that is cultural industries still lacks a comprehensive understanding (Peltoniemi, 2015:41). Researchers such as Eikhof and Haunschild (2007:523) have expressed interest in both the cultural and business/management aspect of cultural industries, claiming that culture and business need to be balanced or integrated for the production process to succeed. Unfortunately, many authors consider the creative production to strive only when creative individuals are independent, non-conformant (Davis & Scase, 2000:viii) and 'passionately involved in their work' (Howkins, 2001:125) or who value 'individuality, difference and merit' (Florida, 2002:8). Due to this, too little investigation has gone into culture and business as 'distinctive references' and as such has influenced the way the creative production process is seen (Eikhof & Haunschild, 2007:523). As a result, too much emphasis may be placed on

the selection systems of cultural goods – systems that cultural goods and services must pass through to reach audiences (e.g. Hirsch, 1972:639-640), or too much focus may rely on the inherent risks and uncertainty surrounding the potential for cultural goods to succeed (e.g. De Vany & Walls, 1999:285).

Another point of view concerning cultural goods within cultural industries sees them as having a non-utilitarian value – valued for beauty or aesthetic rather than usefulness or practicality (Lampel, Lant & Shamsie, 2000:264). According to Lampel *et al.* (2000:264), the non-utilitarian nature of cultural goods is the key characteristic towards understanding the cultural industry. Lampel *et al.* (2000:264) argue that utility implies that products have distinctive features that can be systematically compared, whereas cultural goods are 'subjective experiences that rely heavily on using symbols to manipulate perception and emotion'. In contrast, Towse (2003:6) sees public and private cultural goods and services as having a utility value. According to his interpretation, a visit to the museum or theatre has a private benefit (utility) to the person who pays for the ticket (excluding people who do not pay), while visiting a beautiful city provides a scenic utility that is priceless to compare (Towse, 2003:6).

As evident from above, the characteristics that constitute cultural value or success remains somewhat unclear, but it can be argued that cultural goods and services do share similarities. The following are examples of those similarities (McCain, 2006:147-149; Throsby, 2006:18-20, 2008a:219):

- contains an input of human creativity in the production process;
- have a symbolic message to those who consume them, i.e., having some larger communicative value or purpose than just being a utility; and
- contains, to a degree, a form of intellectual property attributable to the individual or group who produces the good or service.

Peltoniemi's (2015:41) review of 314 cultural industries, however, leads him to confidently characterise cultural industries as being those that 'produce experience goods with considerable creative elements and aim these at the consumer market via mass distribution'. Throsby (2008b:3-6) also identified four important themes when characterising cultural industries, namely the nature of the output, industry structure, the behaviour of firms and employment. A more detailed description of the characteristics follows.

2.4.2.1. Output

Looking at the cultural output, there are two key features that are distinctive to the cultural industry. The first being the oversupply of cultural and creative activities and labour (Richards, 2012:3) and secondly the uncertainty of success for new cultural products (De Vany & Walls, 1999:285). In addition to oversupply, these activities are independent of economic cycles (Throsby, 2001:2). In layman's terms, there are more aspiring artists, singers, actors and even fashion designers than the respective markets can support. As for the uncertainty of success, the first-hand experience is required before cultural goods/services can be evaluated. In other words, one can only be comprehensively informed about the cultural product/service after its consumption as opposed to tangible products with standardised features and specifications (Towse, 2003:6). This applies to both the private and public sector since cultural industries are famous for producing in both sectors (Throsby, 2008a:3).

- **Public cultural goods**

Public cultural goods usually derive from diffused community benefits, such as to civilise the functions of the arts, to provide local and national identity through cultural production and to place value on cultural diversity (Throsby, 2008a:4). Public cultural goods also take on the characteristic of being both non-rival and non-excludable, since one person's consumption of it does not diminish nor reduce its availability to another (Towse, 2003:5). Cultural commodities are considered public goods when no observable prices are available (Throsby, 2001:24). The economic value of public goods to the consumer is reflected from the individual's willingness to pay for such goods, for example through their taxes (Anheier & Isar, 2008:36). Digital content such as television and radio broadcasting is an example of a public cultural good. Digitalising content implies that consumers can 'free ride' (to take advantage of something without payment) on the expenditures of others, meaning that entrepreneurs seeking to make a profit will not be able to capture the full revenue potential of sales (Towse, 2003:5). Software pirating or unlawful recording is an example of this, where the product is being consumed without the entrepreneur making revenue, while those who sell the pirated software can unlawfully benefit from it.

- **Private cultural goods**

Cultural commodities exist as private goods when a set of market prices or potential market prices exists (Throsby, 2001:24). The economic value of private cultural goods is reflected in the market prices by which these goods are sold and bought (Anheier & Isar, 2008:36). 'The cultural value of private cultural goods can be assessed regarding expressed cultural benefits accruing to individuals from their cultural consumption…' (Anheier & Isar, 2008:36).

Private outputs are also readily observed in artwork purchases where the quality of the work is known in advance or by admissions to the theatre, movies and music performances where the price paid reflects expectations rather than reality (Throsby, 2008a:4). A private cultural good can have the excludable characteristic of a public good once it is delivered, performed or published (Throsby, 2008a:4). In such a circumstance cultural commodities take the form of 'mixed cultural goods', having private characteristics (excludable and rival), as well as public characteristics (non-excludable and non-rival) (Anheier & Isar, 2008:36). An example would be buying a famous painting of which private good value accrues only to those who own it, while photos, history or an exhibition of the painting can have public benefits to historians or art lovers (Throsby, 2001:23).

2.4.2.2. Industry structure

Cultural industry exhibits different types of industry structures based on the barriers to enter and exit firms, level of concentration (number of producers and consumers) and product differentiation or product mix (total range of products offered) (Einarsson, 2016:83; Throsby, 2015:58). Winseck (2011:29-30) suggests that the biggest potential barrier within cultural industries is the wholesale of commodified culture or in other words transforming of ideas/cultural goods into objects of trade commodities. Commodification barriers include aspects such as high initial start-up costs for reproduction and distribution, the constant need for 'superficially' new symbolic goods (goods that are new on the outside or surface), high levels of entry uncertainty and the reliance on creative labour (Fitzgerald, 2015:70). Caves (2000:2) listed seven factors for differentiating cultural and creative industries as 'not just another business'. Caves (2000:2) maintains that these factors function at a structural core level to what makes cultural and creative industries distinctive. Additionally, they point out the risk and uncertainty that comes with economic outcomes within cultural and creative industries (Caves, 2000:2; Flew, 2012:75). The factors are identified as follows (Caves, 2000:2):

- Demand uncertainty;
- Creative labour care about their products (art for art's sake);
- Some cultural and creative products require diverse skills;
- An almost infinite spectrum of differentiated products;
- Vertically differentiated skill requirements (substantial pay differentials among creative workers);
- Time is of the essence (finite time frame to co-coordinate diverse cultural and creative activities); and

- Durable products and durable rents (ability to extract economic rents such as copyright or loyalty payments long after production).

Different cultural industry structures can also be segmented using models (Bouquillion, Miège & Moeglin, 2013:76). Models provide the framework that captures the different types of form adopted for commodification (Bouquillion *et al*., 2013:76-82). The forms reflect the type of content, content selection, content delivery, modes for organising production, modes for direct commodification financing (based on intellectual property rights) and modes for organising indirect commodification (based on advertising or state subsidy systems) (Bouquillion *et al*., 2013:76-82; Fitzgerald, 2015:75).

Two leading differentiating models are found for cultural industries, namely 'publishing' and 'flow' (Fitzgerald, 2012:72-92). The 'publishing' model, also known as the editorial model, applies to the purchasing of cultural goods wherein the locus of decision-making lies with the editor (Wasko, Murdock & Sousa, 2011:87). In the publishing model, the editor/producer uses a catalogue of modern cultural artefacts (e.g. computers, laptops, tablets and cell phones) and digital distribution services (iTunes, Amazon, Google Play etc.) 'as a means of mediating between various creative/artistic submissions, industrial production and the uncertainty of the market demand' (Fitzgerald, 2015:75). Cultural goods within the publishing model take the form of DVDs, CDs, BRDs, books, music, video games (Wasko *et al*., 2011:87). The final consumer contributes directly to the financing of the good/content when they purchase a copy of that content (Fitzgerald, 2015:75). An example would be the purchase of a music track on iTunes or a book on Amazon or even the purchase of a game on Google Play (Fitzgerald, 2015:75).

The 'flow model' on the other hand responds to demand uncertainty and focuses on producing a constant flow of products as a packaged service where speed and range of distribution are critical (Garnham, 2000:53). An example of a constant flow of products would include radio broadcasting and television. Unlike the publishing model, the consumers neither pose nor directly pay for this continuous broadcasting/programming, and funding usually comes from third-party advertisers (Fitzgerald, 2015:75). Table 2.1 provides a summarised overview of the two models and how they differ.

Table 2.1: Distinctive features of the flow and publishing model

Model characteristics	Flow	Publishing
1. Sectors	TV and radio broadcasting	Books, music, games, film
2. Dominant form/method of payment	Indirect advertising revenue and state subsidies	Direct sales to consumer
3. Content	Continuous provision of 'ephemeral' (short-lived) prototypes	Discontinuous provision of individual physical (CDs, DVDs, for example.) or digital copies (online purchase)
4. Main coordination function	Editorial maintenance of catalogue	Programmer construction of schedule
5. Remuneration of creative labour	A steady flow of employment based on contracts and salaries, including that of broadcast workers, technicians hosts and journalists for example	Remunerated through royalties and includes a workforce of writers, directors, composers, and artists for example
6. Industrial structure	Quasi-industrial (a resemblance of an industrial structure), vertical integration, and central planning (there is a managerial control over all elements of the value chain)	Oligopoly with a competitive edge - shared infrastructure (printing, studio etc.), project-based networks and a few large companies including small firms
7. Market structure	Vertical integration (supply chain of a company is owned by that company) Constricted oligopoly (market structure where only a few firms have control/dominate)	Oligopoly type market structure surrounded by small firms

Source: Adapted from Lacroix and Tremblay (1997:56-65); Winseck (2011:32); Fitzgerald (2015:75)

By comparing the two above-mentioned models, it goes without saying that different structures can mean differences in outcomes or objectives, which then ties in with the nature of a firm or its behaviour.

2.4.2.3. Behaviour of firms

A cultural firm's utility is determined or represented as a weighted sum of the output of economic and cultural value (Throsby, 2008a:5). Depending on the nature of a firm, these values can differ from firm to firm. The economic value of cultural goods and services are reflected in the price of goods and services, while the cultural value is reflected by consumer experience and intrinsic aesthetic worth (Einarsson, 2016:17). Looking at the concept *value* from these two perspectives provides a good framework for assessing the economic aspects of culture (Einarsson, 2016:17; Hutter & Throsby, 2008:4). Economically, the objectives and incentive structures under which cultural firms operate is of great importance. Even if cultural firms pursue objectives that are mainly economic they are still 'conditioned by the

cultural content of the output they are generating' (Throsby, 2008a:5). Alternatively, O'Connor (2000:15) suggests that cultural commodities have three types of value, namely an economic, social and aesthetic value. Many governments, in particular, recognise the economic value of cultural industries and the role they play in growing cities and tourism identity (O'Connor, 2000:15). Cultural commodities have only strengthened the presence thereof within the urban landscape with the support of government subsidies as a result of digitalisation (UCCN, 2016:internet). The social value of cultural commodities can place importance on cultural identity diversity and take the form of providing local and national identity (Throsby, 2008a:4). This value particularly applies to local news networks and local radio broadcast stations. Cultural goods may also be valued for its beauty or aesthetic rather than its practicality or economic significance (Lampel *et al*., 2000:264) such as the case is for many independent artists and art enthusiasts.

Throsby (2008b:5) hypothesises that the profitable value will systematically increase with the size of a firm. His hypothesis suggests that at the smallest end of the scale the behaviour of individual artists will strongly relate to artistic ideals, whereas at the opposite, large firms will be primarily focused on commercial imperatives. By grouping cultural sector business undertakings, Throsby (2008b:4-5) classified four types of firms according to size, namely:

- Small-to-medium enterprises (SMEs). Regarding size, creative SMEs are the predominant type of firm. The small-to-medium end includes sole trading artists, writers providing television scripts or actors working under a film contract, including small providers of creative services such as design and architectural practices, independent publishers and much more.
- Not-for-profit organisations (NPOs). Voluntary NPOs in the cultural sector can include performing arts companies that present a piece of drama or opera, dance and music concert or a circus performance.
- Public cultural institutions. A particular type of NPO exists within cultural industries; these NPOs are publicly owned or financed institutions that have a significant national, regional, or urban (cities) presence. This includes museums, public art galleries, historical and heritage sites, symphony orchestras, operas, ballet and theatre production companies and public broadcasting organisations.
- Large commercial corporations. These are companies that exceed the size/threshold level (regarding turnover and employment) of typical SMEs. Large commercial corporations are typically found in media, publishing and the production and distribution of audio-visual products (DVD, CD's etc.).

‘The overall industry structure is thus one which demonstrates a version of the long-tail hypothesis, where a small number of large firms account for a significant proportion of industry output and employment, and the rest of the industry is made up of large numbers of smaller enterprises, which, despite their size, are important for other reasons and are of particular interest to policy-makers.’ (Throsby, 2008a:5).

2.4.2.4. Employment

The term *cultural* or *creative worke*r describes someone whose occupation involves culture or creativity as a primary input (Florida, 2002 as cited by Throsby, 2008a:6). Hesmondhalgh and Baker (2011:9) define creative labour as being ‘creative work in the cultural industries’. To better understand cultural employment one can look at the various models that framework these industries such as the DCMS model. The model identifies thirteen cultural and creative sectors including advertising, architecture, arts and antique markets, craft, design, designer fashion, film and video, interactive leisure and software, music, performing arts, publishing, software and computer services, and television and radio (Creative Skillset, 2013:6-7). Those who are mapped alongside the structural characteristics of these sectors can be referred to as being creative labour (Throsby, 2008a:6). In other words, direct employment within these sectors or whose employment broadly corresponds with industry characteristics are considered part of the creative workforce (Brinkley & Halloway, 2010:4). The term ‘cultural worker’ is used interchangeably with the broader concept of creative labour (Ide-Kostic, 2013:internet). The term ‘creative labour’ or ‘creative worker’ is used because it recognises a particular division of labour in the cultural production process (Hesmondhalgh & Baker, 2011:9). However, cultural employment places more emphasis on utilising cultural heritage and traditions as the primary input and artistic elements of creativity, whereas creative employment tends to emphasise individual creative talent and innovation and the exploitation of intellectual property and copy-write law (Ide-Kostic, 2013:internet). For an overview of occupations that are more or less directly involved in the creative process, see Table 2.2.

Table 2.2: The Standard Occupational Classification (SOC) of creative Labour

Creative labour description	
• Advertising and public relation directors and managers • Design and development engineers • Architects • Town and city planners • Librarians • Archivists and curators • Architectural and town planning • Technicians • Artists (Sculptors, painters etc.) • Authors, writers and translators • Actors, entertainers and presenters • Musicians and orchestrators • Arts officers, producers and • Directors • Graphic designers • Product, clothing/fashion and related designers • Journalists, newspaper, magazine and periodical editors • Photographers, audio-visual and broadcasting equipment operators • Software and programme development professionals	• Marketing and multimedia associate professionals • Footwear and leather working trades • Tailors and dressmakers • Textiles, dressmakers and related trades • Pre-press technicians • Printers • Print finishing and binding workers • Video game directors, programmers, producers and sound editors • Glass and ceramic makers • Decorators and finishers • Furniture makers and other craft woodworkers • Movie and theatre set creators and designers • Florists, flower arrangers, and landscape designers • Handcraft, precious metal smiths and other related skills. • Dancers and choreographers • Web designers

Source: Adapted from Creative Skillset (2013:13-14)

Both ‘creative’ and ‘non-creative’ workers are used during the cultural production process of many cultural industries such as the film, music and journalism industry (Stokes, 2013:95). Workers whose roles are mapped to the economic value of production and not the creation are referred to as ‘humdrum’ or ‘non-creative labour’ (Glover, 2002:81). ‘Non-creative workers’ are also referred to as having support occupations as they technically only support creative activities (Jones, Lorenzen & Sapsed, 2015:393). This includes managers, accountants, contract workers, and those involved in the press and publishing industry (Glover, 2002:81; Stokes, 2013:95).

‘Creative labour’ on the other hand can be divided into two subsections: those working in the ‘arts’ sector (painters, sculptors, and writers for example) and those working in the ‘media sector (broadcasting, TV, Radio, film, publishing businesses, web-related skills for example) (Hesmondhalgh & Baker, 2011:1). The term ‘creative labour’ is used and not ‘artistic labour’ since the latter strictly revolves around the concept of art (leaving out media) and due to the

symbolic nature of cultural industries that may centre less on art and more on interpretive knowledge, such as journalism (Hesmondhalgh & Baker, 2011:9).

Another approach towards dividing or classifying the creative workforce is the creative trident (Higgs & Cunningham, 2008:26). The creative trident is considered the nexus between industry and occupation classifications, whereby three broad classes of employees are identified as an estimate of the creative workforce (Centre for International Economics [CIE], 2009:19). The three classes representing total creative employment are as follows (CIE, 2009:19; Higgs & Cunningham, 2008:26):

- specialist creatives – those workers employed in creative occupations in creative industries;
- support workers – those workers employed in creative industries, but in non-creative occupations; and
- embedded creatives – those workers employed in creative occupations, but in industries that do not produce creative products.

Not only does the creative trident classify the creative workforce, but it also provides a broader and more complete view of the creative economy (CIE, 2009:19). Total employment within the creative economy is measured by the sum of jobs in the creative industries plus creative occupations in other industries (Creative Industries Council [CIC], 2016:Internet). Having educated and skilled workers within these industries is considered to be one of the most important long-term drivers of a successful creative economy (CIC, 2017:internet).

Creating jobs has been one of the number one priorities in South Africa, so it does not come as a surprise to see the country 'increasingly beginning to focus on cultural and creative industries as potential contributors to economic growth and job creation' (Snowball, 2016:internet). This is evident in Mzansi's Golden Economy Report where tourism was identified as a priority area for creating jobs through the contribution of the cultural and creative industries (Mzansi's Golden Economy, 2016:7). According to the Government's commitment to the New Growth Path strategy (Mzansi's Golden Economy, 2016:7):

> The proposed strategy recognises that the arts, culture and heritage sector is innovative and creative and that the role of government is to create the enabling environment and support the sector to perform optimally.

Covering all the innovative and creative activities of the arts, culture and heritage sector leads to the creative industries and the primary focus of this chapter.

2.5. The creative industries

The creative industry is undeniably one of the most important and influential industries for growing the economy, creating jobs (EY, 2015:12) and boosting tourism potential (OECD, 2014a:52). It is an industry driven by creativity and the reproduction and digitalisation of culture and expressive content (O'Connor, 2007:7; The Work Foundation, 2007:103; UNESCO, 2015:1). With origins in cultural reproduction (Moore, 2014:741) and as an evolutionary shift of the term 'cultural industry' (O'Connor, 2010:26), it is important to understand how the term 'creative industry' was conceptualised. Hence the following section serves as an analysis of this industry, starting with its reference change from 'cultural industries' to 'creative industries'.

2.5.1. Changing the reference from cultural industries to creative industries

The formal origins of the term creative industries were first introduced in 1997 by the then newly elected British Labour government (Flew, 2012:9). At the time, the head of the British Labour government, Tony Blair, established a Creative Industries Task Force (CITF) within the Department of Culture, Media and Sport (Flew, 2012:9). The Task Force set about mapping current activities into sectors they deemed to be part of the UK's creative industries (Flew, 2012:9). The sectors were measured for overall economic performance and policy measures were identified that would promote development in the sectors (Flew, 2012:9). In mapping the sectors, the 'New Labour' party (DCMS) renamed cultural industries to creative industries as part of the celebratory hype for the new party's election and the political hype surrounding the 'Cool Britannia' theme associated with the 'New Labour' transition (O'Connor, 2007:41). The change served to separate the 'creative industries' from the 'arts and culture' policy, but at the same time recoup (some of) the benefits of the arts and culture agencies (O'Connor, 2007:41). In 1998, the DCMS produced the first 'Creative Industries Mapping Document' which legitimately recognised cultural industries as being part of the object of policy (Jayne, 2005:537). The policy involved placing cultural industry strategies at the heart of local economic and cultural strategies (Jayne, 2005:537). The document identified 13 subsectors or creative industries linked to this national cultural and economic policy, namely advertising, antiques, architecture, crafts, design, fashion, film, leisure software, music, performing arts, publishing, software, and TV and radio.

Crucial to the shift from 'cultural industries' to 'creative industries', the object of the new policy was to identify creative industries with a 'new economy' driven by 'digital' technologies and the 'information' or 'knowledge' economy (O'Connor, 2010:51). The exploitation of intellectual property rights (IPR) provided the ideal link to positioning the creative industries at the forefront of economic competitiveness (O'Connor, 2010:51). This also caused the

many industrial sectors to sway focus towards entrepreneurial creativity, intellectual property rights and generating patents (O'Connor, 2007:43). Intellectual property is a statute law that was implemented to protect expressive value from being illegally copied or reproduced (The Work Foundation, 2007:98). Intellectual property rights also distinguish between copyright and patents. Copyright comes into effect automatically and protects the original expression, whereas patents are limited monopolies that are 'granted to an individual for 20 years in return for the public disclosure of technical information about an invention' (The Work Foundation, 2007:98). Copyright protection in high-tech and digital sectors can last for life and in extreme cases an additional 70 years (Calame, Dagg, Matheson, Osha, Ulfsdotter & Yoshida, 2005:1). Because expressive value can be closely regulated for infringement by copyright law (Gordon, 2017:402), it is important to understand what is meant by expressive value.

2.5.2. Expressive and physical artefact values in creative industries

The following section serves as an examination of expressive value in creative industries, as well as the value of physical artefacts in these industries.

2.5.2.1. Expressive value in creative industries

Historically, the expressive value in cultural industries took the shape of traditional art, such as painting, sculpting, live theatre performances etc. (Flew, 2012:27). By the 21st century, the expressive value could simply no longer be confined to traditional arts due to commercial media, digitalisation and rapid growing software markets (Flew, 2012:27). These advances and technologies allowed expressive value to be represented in software programmes (Paint and Photoshop), video games, and other interactive and user-generated cultural material found on the internet such as social media (Facebook, Twitter, Instagram and Snapchat) (The Work Foundation, 2007:97). Games such as the *Grand Theft Auto, Uncharted* and *Tomb Raider* series combines story narratives, motion performances and naturalistic looking graphics with play to engage users in expressive and interactive worlds (Smuts, 2005:2).

Alongside traditional arts, these new forms of expressive value started to deviate from 'cultural industries' into a new creative sector of 'creative industries' (Flew, 2012:27). Creative industries are considered a universal term that covered all expressive value (Flew, 2012:27). To better understand the term 'expressive value', it has been defined by The Work Foundation (2007:96) as 'every dimension (in the realm of ideas) which, in its broadest sense, enlarges cultural meaning and understanding'. This is seen as incorporating

elements such as aesthetic value, spiritual value, social value, historical value, symbolic value and authenticity value (see Table 2.3).

Table 2.3: Expressive values

Expressive value	Definition
Aesthetic value	The value as reflected in beauty, harmony, form and other aesthetic characteristics.
Spiritual value	This could either be secular or religious and refers to a quest for spiritual meaning. Spiritual values include understanding, awareness, and insight.
Social value	The social value lies in the capacity to forge ties amongst individuals or to creative relationships and identity on which societies strive.
Historical value	Artistic values offer a frame/snapshot of the conditions at the time they were created in. The historical value lies in its sense of continuity with the present.
Symbolic value	Symbolic value derives from the meaning an individual derives from the work, and the symbolic value of work lies in the value a consumer has for the work based on the meaning conveyed by the work.
Authenticity value	This refers to the work as being real, original and unique in its representation.

Source: Adapted from Throsby (2001:26)

When differentiating between the two industries, cultural industries seem to focus more on the mass reproduction of expressive outputs based on copyright, while creative industries 'instead of work more as a link to the so-called wider economy, delivering both expressive and functional value' (Manzoni, 2014:19). Expressive and creative values hold the potential of creating new insight, providing new and delightful experiences, adding to human knowledge, stimulating emotions and enriching lives (The Work Foundation, 2007:97). Behind all expressive value lies some physical work that goes into its creation. Many creative industries design or produce physical artefacts by which expressive value is conveyed (Miles & Green, 2008:12). The value of physical artefacts usually derives from their perceived cultural and creative value and meaning or the experiences they help create (Flew, 2012:25; Miles & Green, 2008:12).

2.5.2.2. The value of physical artefacts within creative industries

Many creative industries are involved in the designing and production of information products, and therefore it is not unusual to find many artefacts or products in digital form (Miles & Green, 2008:12). The value of the physical artefacts – the physical work for conveying the idea – within information products are usually based on the content, cultural

meaning and the experience it creates (Throsby, 2001:104). Jones *et al*. (2015:4) refer to 'artefacts' and 'offerings' as the creative product of creative industries. Creative products can be anything from physical items, performances, and services, to consumer deliverables (Jones *et al.,* 2015:4).

There are two dimensions of creative products or artefacts – semiotic codes and material base (Weber, Patel & Heinze, 2013:360). The two dimensions 'shape our aesthetic experiences, enable us to categorise creative products and generate market niches' (Jones *et al*., 2015:6). The first dimension, semiotic codes, highlights the creative product's symbolic nature that gives meaning to artists to work and help shape how the viewer/audience interprets it (Cairns, 2005:s.a.:2-3). The patterns among symbolic elements contain a semiotic code, and this code refers to the style (visual arts) or genre (music and literary artwork) that forms the basis for classifying creative products (Jones *et al.,* 2015:6). For example, the video-game Far Cry 3 classifies as an action adventure game since it contains the elements of the adventure and action game genre. Crossing genres may be used by artists, game studios, filmmakers and musicians to attract multiple audiences, but it risks confusing audiences and lowering the perceived integrity of the creative product (Hsu, 2006:420). The benefit of working within a genre lies in its tried and tested formula (Jones *et al*., 2015:6).

The second dimension, material base, refers to the materials needed to give to creative products, including the technologies and socio-technical systems within production and consumption (Jones *et al*., 2015:7). The material base for creating creative products can be very diverse, ranging from paint and paint brushes for painting to computers and software for creating animation (Jones *et al*., 2015:7). The interworkings of these activities to convert an idea into a creative product is known as the value chain (Bhatiasevi & Dutot, 2014:471; Dervojeda, Nagtegaal, Lengton & Datta, 2013:21).

2.5.2.3. The value/creative chain

A creative value chain is described as 'a sequence of activities to which value is added to a new product or service as it makes its way from invention to final distribution' (Botkin & Matthews, 1992:26). It represents the cycle of creative content (product or service) from idea to consumption (Pratt, 2004a:11). The creative value chain has also been named many other things including 'creative production chain' (Pratt, 2004a:11), 'value chaining' (Moore, 1996:70), 'value shop' or 'value network' (Stabell & Fjeldstad, 1998:413), 'value circuit' (Jeffcutt, 2004:81), and 'value creating ecology' (Hearn, Roodhouse & Blakey, 2007:419). Regardless of what it was called, the creative value chain remains the official term

(Bhatiasevi & Dutot, 2014:471). The creative value chain is also the most straightforward and widely recognised method used to analyse the structure and function of creative industries (Bhatiasevi & Dutot, 2014:471). The initial or first link of the creative chain is the conveyance of a creative idea which is then proceeded by a series of interwoven steps and inputs between production and use (Statistics Canada, 2013:internet). The steps are usually distinct and can be done by different business establishments (Statistics Canada, 2013:internet). Alternatively, a single enterprise or individual can carry out the value chain, but it may require the enterprise or individual to be affluent in different skill groups (Bhatiasevi & Dutot, 2014:471). This all depends on the type of product being produced. For example, a woodcarver can produce his figures with his resource materials whereas a video-game might need the help of different artists, sound engineers, music composers or developers from other departments or studios. It should also be noted that although the skill groups are interconnected, the correspondence between the steps in the value chain might not be fixed (Abadie, Maghiros & Pascu, 2008:16). As an example, one might see an artist as directly selling his/her works to the consumer without the help of a publisher. Traditionally, however, the creative value chain has five steps from content creation to consumer consumption as Illustrated in Figure 2.4. These steps will subsequently be discussed:

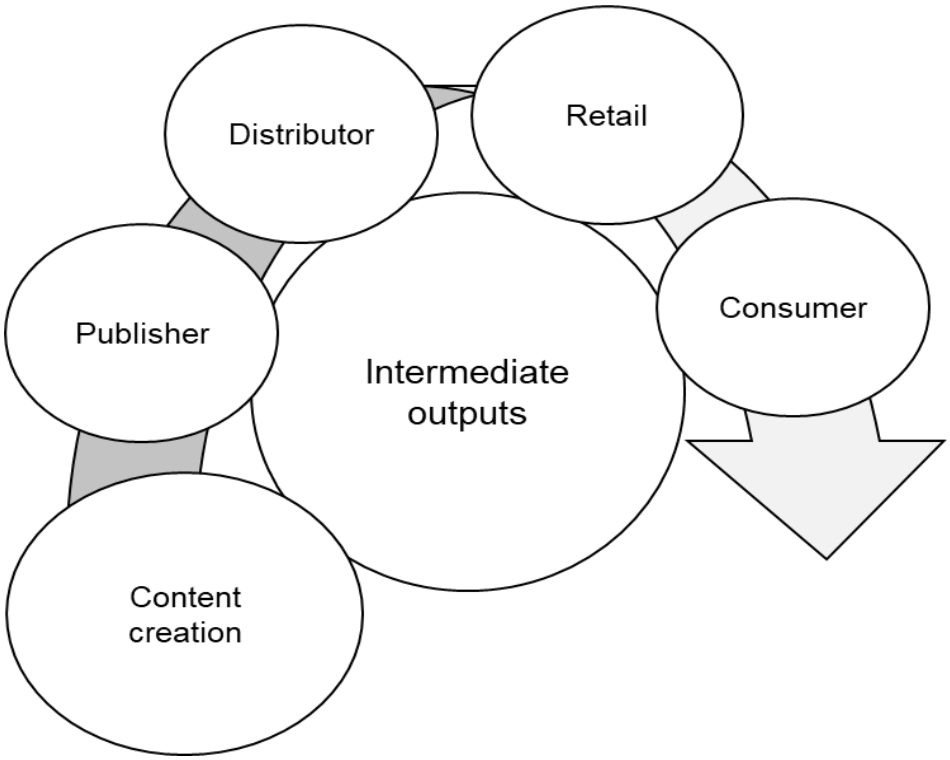

Figure 2.4: Creative content sector value chain

Source: Adapted from Abadie *et al.* (2008:17)

- **Content creation**

Content creation refers to the artistic and technical activities that go into creating creative and intellectual content (Pratt, 2004a:12). The creation of creative content is also referred to as the creation of an original (Hill, 1999:440). An original is an archetypical/very specific intangible good that begins its development cycle without physical characteristics, making it a discrete entity (Hill, 1999:440). It is also possible to establish ownership rights over an original, providing economic value to its creator (Hill, 1999:440). Publishers and content creators are the ones who finance initial content creation and marketing, a requirement that puts them centre stage in the creative industry (Dervojeda *et al*., 2013:21). Increased consolidation or alliances among content creators and publishers over the years have reduced market entry points for independent content creators, resulting in a classic case of oligopoly (a market dominated by a small number of large sellers) (Dervojeda *et al*., 2013:22). In the case of an alliance, publishers provide content creators with funding advancement in exchange for property rights to the creation (Dervojeda *et al.*, 2013:22). Once the advances are recouped content creators start receiving royalties, usually in the form of shares (Dervojeda *et al*., 2013:22).

- **Content publication**

During the content publication step, creative content is aggregated, presented, packaged, priced and marketed (Abadie *et al*., 2008:6; Filmby Aarhus, 2011:14). The type of relationship that exists between the publisher and distributor can vary based on the physical nature of the good being produced (Dervojeda *et al*., 2013:22). The importance level and power of distributors and wholesalers are reduced when content is digitalised or if the content creator makes use of an online distribution system (Dervojeda *et al*., 2013:22). Digital content involves some digital rights management which may include security measures, permission to publish, rules for delivering, viewing the right to content, decimation, and access to content, and ownership rights (Filmby Aarhus, 2011:14).

- **Content distribution and mass production**

Distribution and mass production refer to those activities that channel content to markets (Henry, 2007:118; Pratt, 2004a:12-13). Production involves preparing content in a format that is suitable for distribution or mass distribution (Filmby Aarhus, 2011:14). Examples of content distribution activities include CD/DVD replication, shipping and wholesaling of physical content and the otherwise use of digital delivery systems (Henry, 2007:118; Pratt, 2004a:12). Preparing content for online streaming would also require managing internet access services, web traffic and doing analyses (Filmby Aarhus, 2011:14). In summary,

content distribution involves all activities related to transportation content, logistics intermediation and stock management (Abadie *et al*., 2008:6). Digitalised distribution has also created new opportunities for creative content aggregation, distribution and branding such as internet portals and online service providers (Dervojeda *et al*., 2013:22).

- **Content exchange/retail**

Content exchange refers to both the exhibition (a function that embodies venue-based activities such as cinemas, theatres and concert halls) and retailing (selling of Books, CDs, DVDs, and games) of creative content (Pratt, 2004a:13). Activities that take place in this step includes retail pricing, presentation and transaction management (Abadie *et al.,* 2008:6). Creative content is subject to these activities until it is sold to the consumer (Abadie *et al*., 2008:6).

- **Providers of intermediate inputs and tools**

Due to new technological processes, cost complexities, and fiercely demanding markets in today's society, many content creators started relying on developers of creative and project management tools (Dervojeda *et al*., 2013:22). These tools aim at controlling or containing rising project costs while also keeping with schedules. Intermediate tools can take the shape of user licensing agreements on contractual loyalties/shares (Dervojeda *et al*., 2013:22).

- **The community of customers**

The last stage of the creative chain consists of the use/consumption of creative content. 'Traditionally, the use of culture products has included the purchase, borrowing, and reading of books, magazines, and newspapers, listening to radio, watching television, tickets for movies or live performances, admission to museums or galleries, playing a musical instrument, playing computer games etc.' (Statistics Canada, 2013:internet). Consumption can see the user or a group of users taking the role of participant, audience, 'steward', visitor or spectator during usage stage of creative content/products (Stanley, 2004:17).

In concluding the creative value chain, it is evident that creative products originate from a creative idea or an idea of originality. Creativity is one of the key aspects, if not the primary aspect, that characterises the creative product and the creative industries. Also evident from the creative value chain is that many of its activities are representative of creative industry characteristics such as involving value creation (conveyance of an idea to a product), creative input (creative labour) and Intellectual property rights. The following section serves to provide a better understanding of the creative industry characteristics.

2.5.2.4. Characteristics of the creative industries

Once an idea has been converted into creative/expressive value and that value is commercialised, it emphasises the word 'industry' (The Work Foundation, 2007:96). In creative industries, when the expressive value is delivered or sold it generates economic value that contributes to the general economy (The Work Foundation, 2007:96). In reality, all industries involve some form of economic activity (OECD, 2000:7), which raises the question: how do creative industries differ from other industries in the general economy? In doing so, one must look at the characteristics that conceptualise the creative industries (Cunningham, 2003:2). According to Rozentale and Lavanga (2014:61), the nature of creative industries can be divided into two separate categories. The first is called the 'internal perspective' of a creative firm and refers to the features related to the nature of their production and provision of goods and services (Rozentale & Lavanga, 2014:61). The second category, 'external aspects', has to do with a creative firm's underlying expectations and involves the relationship between creative industries and economic development (Rozentale & Lavanga, 2014:61). See Table 2.4 for an overview of the features and aspects included in these categories.

Table 2.4: The nature/characteristics of creative industries

Internal perspective	External aspects
• Labour and knowledge-intensive • Create and exploit intellectual property • Use a combination of creative and non-creative skills/employment • Producers of artistic, cultural and creative goods • Dependent on new technology • Primarily intrinsically motivated • Experiences high-risk levels due to uncertainty • Produces high level of novelty good and services	• Contribute to economic growth • Contribute to job creation/employment • Have value-added growth

Source: Adapted from Rozentale and Lavanga (2014:61-62)

By combining the aspects mentioned by Rozentale and Lavanga (2014:61) with a literature study on creative industry features (Cunningham, 2003:2; Foord, 2008:91; The Work Foundation, 2007:96; UNCTAD, 2004:4; United Nations Industrial Development Organization [UNIDO], 2007:15), four characteristics are identified as essential for conceptualising creative industries, including:

- **Expressive value**

More so than other areas of the knowledge economy, a more significant part of ‘creative values’ commercial turnover is attributable to acts of genuine ‘creative origination’’ (The Work Foundation, 2007:96). Also, refer back to 1.4.2 on expressive and physical artefact values in creative industries.

- **Input**

All sub-sectors (fashion, design, film, music etc.) of the creative industry revolve around the input of skill, creativity and talent (Cunningham, 2003:2). Human capital is the primary benefactor to these inputs (UNIDO, 2007:15). For human capital to produce growth or exhibit these characteristics, the development professionals (including arts and culture departments) must acknowledge and promote the importance of creativity and innovation in creative industry development (UNIDO, 2007:15). Concerning entrepreneurs, understanding and applying the arts with technology and business skills is important to succeed in the creative economy (UNIDO, 2007:15).

- **Creative labour**

As an element of the ‘input’ characteristic, creative labour refers to the human capital that fuels the creative process (Hesmondhalgh, 2007a:9). These are the workers whose occupation is involved in creativity (Florida, 2002 as cited by Throsby, 2008a:6). For a more detailed discussion, refer to 2.2.1 under the subheading ‘Employment’.

- **Intellectual property rights**

Creative industries were first introduced as a signpost to signify the interface between commercialisation, cultural activities and the emerging ‘new media’ in an age driven by digital technologies (Foord, 2008:94). This caused cultural industries and their shift towards creative industries to be associated more with a generic new knowledge economy (Foord, 2008:91). As a result, this led to ‘increased preoccupation with the Intellectual Property (IP) of content-based production and services’ (Foord, 2008:91). Intellectual property is any creation of the mind used in commerce such as inventions, literary, artistic works, symbols, names and images (World Intellectual Property Organization [WIPO], 2018:4). Intellectual property rights allow creators or owners to ‘benefit from the protection of moral and material interests resulting from authorship of scientific, literary or artistic productions’ (WIPO, 2018:4). Intellectual property rights such as copyright, trademarks and design rights are an extremely contentious decision for reshaping and promoting organisational innovation (Miles & Green, 2008:12).

- **Policy**

In the world of policy-making it seemed as if a successful new industry had suddenly arrived and from nowhere when the ‘Creative Industries Mapping Document’ was introduced (Pratt, 2004b:19). The reason it gave this impression was that constituent industries, such as film, television and advertising, was now suddenly included as creative industries whereas they were previously part of the state-supported sector or viewed as something of a peripheral activity to the ‘real economy’ (Pratt, 2004b:19). By including constituent industries, the focus of creative industries was seen as ‘an attempt by the cultural sector and the cultural policy community to share in its relations with the government, and in policy presentation in the media, the unquestioned prestige that now attaches to the information society and to any policy that supposedly favours its development’ (Garnham, 2005:20). A consequence of this attempt saw creative industries promoting and strengthening copyright protection policies which benefitted copyright industries within creative industries such as software, media and entertainment industries (Flew, 2012:20). Over the years, this alliance with copyright industries led to new policy discourse where the symbolic and cultural dimensions of all aspects of the economy acquired a greater significance (Flew, 2012:19).

The introduction of the first ‘Creative Industries Mapping Documents’ was also seen as a politically pragmatic strategy that ‘opened a door’ to treasury funding (Pratt, 2005:33). The approach helps gain economic respect for a sector that was previously recognised as simply being ‘the arts lobby’ (Pratt, 2005:33). The documents also strategically aligned cultural and creative sectors to more prestigious policy domains associated with the knowledge economy and the information society (Garnham, 2005:20). The significance of these documents and their analysis of the creative industries provided new ways of collecting and aggregating data on cultural sectors that were previously neglected under Standard Industry Classifications (SIC) models (Pratt, 2004b:19). The SIC system is an internationally accepted set of codes for the standard classification of all economic activities (Companies and Intellectual Property Commission, s.a.:internet). To better understand how industries are classified, see the following section.

2.5.2.5. Classification of creative industries

The positive role the ‘Creative Industries Mapping Document’ played for creative industries in Britain's changing economic landscape made them very influential worldwide (BOP Consulting, 2010:16). In fact, their influence on Britain's economy became so recognised that many other countries and organisations adopted and adapted similar models for mapping their creative industries (see The Work Foundation, 2007; UNCTAD, 2004; UNIDO, 2007). Alas, many of the adaptations were the result of considerable debates pertaining to

the number of industries that are considered ‘creative’, or conventional business software and consultancy not being considered ‘creative’ or the document merely being based on the retail of pre-existing creation/creative content and not fresh acts of creation (BOP Consulting, 2010:16).

Whatever the reason for adaptation, many new models and classification systems arose from these documents. The Statistical classification of economic activities in the European Community, abbreviated as NACE (Nomenclature statistique des activités économiques dans la Communauté européenne), is one such a method used for classifying creative industries (Rozentale & Lavanga, 2014:56). NACE was developed in 1970 to designate various statistical classifications of economic activities in the European Union (Eurostat, 2008:13). It also serves as a framework for collecting and presenting large statistical data in the field of economic statistics (e.g. employment and national accounts) (Eurostat, 2008:13). The initial list of NACE classifiers included ten creative industry sectors – advertising, architecture, broadcasting, cultural, economic branches, fashion, film industry, libraries and museums, music publishing, publishing and printing, and software and games, but was later adapted to include design manufacturing, fashion manufacturing and cultural education (Rozentale & Lavanga, 2014:58). The latter sectors were primarily added since they represented different parts of the value chain (Rozentale & Lavanga, 2014:58). See Table 2.5 for the above-mentioned classification of creative industry sectors and their respective NACE classifiers.

Table 2.5: NACE classifiers of creative industries

Creative industry sectors	**Included NACE classifiers**
Publishing	Books, directories and mailing lists publishing activities, newspapers (excluding software), journals and periodicals, printing of newspapers, pre-media and pre-media services, and other printing and publishing activities (excluding software)
Film	Motion picture, video and television programme projection, production, post-production and distribution activities
Music publishing	Sound recording, music publishing and reproduction of recorded media
Broadcasting	Radio broadcasting and television programming and broadcasting
Cultural, economic branches	Performing arts, support activities to performing arts, artistic creation, operation of arts facilities and photographic activities
Libraries and museums	Library, archive and museum activities and the operations of historical sites, buildings and similar visitor attractions
Architecture	Architectural activities
Advertising	Advertising agencies and media representation

Software and games	Computer games publishing, software publishing and computer programming activities
Fashion (manufacturing)	Manufacturing of leather clothes, work wear, outerwear, underwear, wearing apparel, articles of fur, knitted and crocheted hosiery and apparel, footwear, luggage, handbags, saddles and harnesses, including the tanning and dressing of leather and the dying and dressing of fur
Design (specialised)	Specialised design activities, engineering design and engineering activities for activities are specific to technical fields
Design (Manufacturing)	Manufacturing of wallpaper, ceramic tiles and flags, ceramic household artefacts and ornaments, watches and clocks, office and shop furniture, mattresses and other furniture, jewellery and related articles and the imitation of jewellery and related articles
Cultural education	Cultural education activities

Source: Adapted from Rozentale and Lavanga (2014:58, 62-63)

The Standard Occupational Classification (SOC) system is another system involved in creative industries to classify creative occupations (Creative Skillset, 2013:13-14). SOC is used by Federal Statistical Agencies in the US to classify workers into occupational categories to collect, calculate, and disseminate data (United States Department of Labour, 2016:internet). Refer back to Table 2.2 for the Standard Occupational Classification (SOC) of creative labour. As for the mentioned models, the following section serves to thoroughly examine the different models used for classifying cultural and creative industries. This includes the most popular models used today, as well as less popular models and how they compare.

2.5.3. Models of cultural/creative industries

On 16 November 1945 the Constitution of the United Nations Educational Scientific and Cultural Organisation (UNESCO) was signed by 37 countries and came into force with its 20th ratification on 4 November 1946 (UNESCO, 2010:internet). The organisation was created in repose to the 2nd World War with the conviction that political and economic agreements are not enough to build long-term peace (UNESCO, 2016:internet). The organisation believed that peace is established by humanity's moral and intellectual solidarity, and aimed to build networks among nations that will enable this kind of solidarity (UNESCO, 2016:internet).

In 1986, the organisation published a landmark Framework for Cultural Statistics (FCS) (UNESCO, 2015:4). The FCS provided a common structure used for collecting data on cultural activities (UNESCO, 2015:4). Today the organisation uses the FCS structure to develop effective statistical methodologies at an international level to provide governments with the tools to study their creative industry sectors (UNESCO, 2015:4). In a way, the FCS

was considered one of the first models to categorise the cultural industries, including sectors such as cultural heritage, printed material, music and performance arts, visual arts, audio-visual media, cinema and photography, radio and television, socio-cultural activities, sports and games, and the environment and nature (UNESCO, 2015:4). Today there are several different models in practice that provide a systematic understanding of the structural characteristics of cultural and creative industries (UNESCO, 2013a:21). Six of the most popular models have been identified, as seen in Table 2.6, and will subsequently be discussed.

Table 2.6: Popular creative industry models

1. DCMS Model	2. Symbolic Text Model	3. Concentric Circles Model	4. UIS Trade-Related model	4. WIPO Copyright Model		6. Americans for the Arts Model
• Advertising • Architecture • Arts, crafts and the antique market • Design • Fashion • Film and video • Interactive Leisure • Performing Arts • Music • Publishing • Software and computer service • Television and radio • Video and computer games	**Core cultural activities** • Advertising • Film • Internet • Music • Publishing • Television and radio • Video and computer game **Peripheral cultural activities** • Creative Arts **Borderline cultural industries** • Consumer electronics • Fashion • Software • Sport	**Core creative arts** • Literature • Music • Performance arts • Visual Arts **Other core cultural industries** • Film • Libraries and museums **Wider cultural industries** • Heritage services • Publishing • Sound recording • Television and radio • Video and computer games **Related Industries** • Advertising • Architecture • Design • Fashion	**Core cultural goods and services** • Audio-visual services • Books • Copyright loyalties • Heritage • Newspapers and periodicals • Recordings • Video games • Visual Arts **Related cultural goods and services** • Advertising • Architectural services • Audio-visual equipment • Information services • Musical instrument	**Core copyright industries** • Advertising • Collecting societies • Film and video • Music • Performing Arts • Publishing • Software • Television and radio • Visual and graphical art **Interdependent copyright industries** • Blank recording material • Consumer electronics • Musical instruments • Paper (literature) • Photocopiers and photographic equipment	**Partial copyright industries** • Architecture • Clothing and footwear • Design • Fashion • Household goods • Toys	• Museums and collections • Performing Arts • Visual arts and Photography • Film, radio and television • Designing and publishing • Art schools and services

Source: Adapted from Throsby (2007:3-4), UNESCO (2013a:21) and Americans for the Arts (2015a:2)

2.5.3.1. Department of Culture, Media and Sport (DCMS) Model

DCMS was established in 1997 in the United Kingdom (BOP Consulting, 2010:18). This department aimed to protect and promote cultural and artistic heritage, aid communities and business growth by investing in innovation and promoting Britain as an attractive tourist location (DCMS, 2015a:internet). A year later, the DCMS produced the 'Creative Industries Mapping Document' which became the first systematic attempt anywhere to measure creative industries in Britain (BOP Consulting, 2010:18). Although the document mainly focused on creative industries, it is considered a cornerstone for recognising the importance of creativity in the economy and society as a whole (BOP Consulting, 2010:20).

In 1999, the British Council's Creative Industries Unit was established as part of the Arts Department's attempt to work with the creative sectors and develop the UK's creative economy (Newbigin, 2010:60). The British Council's Creative Industries Unit was tasked with developing a programme of work that would allow creative industries to have a wider impact regarding education, social inclusion, economic regeneration and international engagement/relations (Newbigin, 2010:60). In 2001, the mapping exercise was repeated and it was discovered that creative industries were growing faster than most other sectors in the UK economy (Newbigin, 2010:23). The 2001 'Creative Industries Mapping Document' included 13 sectors of economic and cultural activity, namely: advertising, architecture, art and antique markets, performing arts, crafts, design, designer fashion, film/movies, interactive leisure software (video games), music, publishing, software, and television and radio (Newbigin, 2010:23).

In 2002, a commission on the creative industries was established by London's then mayor, Ken Livingstone, as a way to assess the economic value and potential contribution of these industries on London's economy (BOP Consulting, 2010:20). The reason being that creative industry was found to be the second largest (next to the financial sector) contributor to the city's economy in 2001 (BOP Consulting, 2010:20). Work done by this Commission led to the establishment of the 'Creative London' project in 2004 as an overarching strategy from within London's Development Agency (LDA) to support creative industries in the city (LDA, 2006:29). 'Creative London' also aimed to use creative industries in regenerating some of the more rundown parts of London and enhance its brand (LDA, 2006:29).

'Creative London' inspired DCMS to launch a major research project between 2005 and 2007, the Creative Economy Programme, which resulted in the establishment of 'Creative Britain' in 2008 (see DCMS, 2008:6). The 'Creative Britain' report set out to support the creative sector by focussing on education, skills, innovation and intellectual property (BOP

Consulting, 2010:20). In 2006, the term ‘creative economy’ was formally adopted by the UK government, ‘which includes the contribution of those who are in creative occupations outside the creative industries as well as all those employed in the Creative Industries’ (DCMS, 2015b:5).

2.5.3.2. Symbolic Text Model

The Symbolic Text Model is based on industries linked to the industrial production and dissemination of symbolic text (Throsby, 2007:2). In this regard, all creative work involves the manipulation of symbols for entertainment, information and enlightenment (Hesmondhalgh, 2007a:4). Artists are the ones responsible for this manipulation (Hesmondhalgh, 2012:6). Heshmondhalgh (2007a:5, 2012:3), the creator of the Symbolic text model, refers to the artist as a ‘symbol creator’ and their work as ‘symbolic creativity’ instead of ‘art’. By doing so, he promotes a text-based account of creative production in an attempt to reject the idea of creativity as self-expression and avoid divisive connotations of genius, often linked to creativity (Heshmondhalgh, 2007a:5).

The term ‘texts’ refers to cultural artefacts produced by cultural industries and are seen as ensembles of symbols manipulated for certain purposes (McStay, 2013:58). Texts or symbolic texts according to the symbolic text model is a collective name for products such as television programmes, books, films, newspapers and advertisements (McStay, 2013:58). All these products are considered the core cultural activities of the symbolic text model since they ‘deal primarily with the industrial production and circulation of text’ (Hesmondhalgh, 2007:12). The core cultural industries of the Symbolic Text Model includes advertising, film, internet, music, publishing, television and radio, and video and computer games (Throsby, 2007:3).

The Symbolic Text Model also identifies two other types of cultural activities, namely peripheral cultural activities and borderline cultural industries. Peripheral activities or industries are those industries that reach fewer people in modern societies, such as creative arts, and thus have lesser social and cultural influence than that of the core cultural activities (Hesmondhalgh, 2012:18). Similar to core cultural industries, peripheral cultural industries are centred on the reproduction of texts but differs in the reproduction process of symbols since they are mainly produced by non-industrial or semi-industrial methods (Hesmondhalgh, 2012:18). Borderline cultural industries, however, are referred to as industries that act as gateways for cultural industries or indirectly contribute to cultural industries (Hesmondhalgh, 2012:18). This includes industries such as consumer electronics fashion, software and sport, which affect cultural industries profoundly but do not produce

text in the discussed sense of the term (Hesmondhalgh, 2012:18). For example, Google Books allows for an enormous amount of creative content to be made available that might otherwise be difficult to find whereas the design of Apple devices might impact the look and feel of similar market devices.

Compared to the DCMS Model, the Symbolic Text Model recognises advertising and public relations as a core cultural activity but pays little attention to the differences between occupations (Edwards, 2015:371). The Symbolic Text Model also places media industries (advertising and publishing) as core cultural industry activities, and is in contrast to the Concentric Circles Model which places creative arts under core activities based on individual talent and creativity (Flew, 2013:11).

2.5.3.3. Concentric Circles Model

David Throsby (see 2001, 2008a, 2008b, 2008c) is one of the earliest and best-known authors to describe and illustrate the terminology behind modelling the cultural and creative industry. His work gave rise to the concentric circle model which captured the cultural and creative industry into several ‘concentric circles’. The United Nations Educational, Scientific and Cultural Organization (UNESCO, 2013a:23) later made terminological adjustments to David Throsby’s concentric circle model and can be seen illustrated in Figure 2.5.

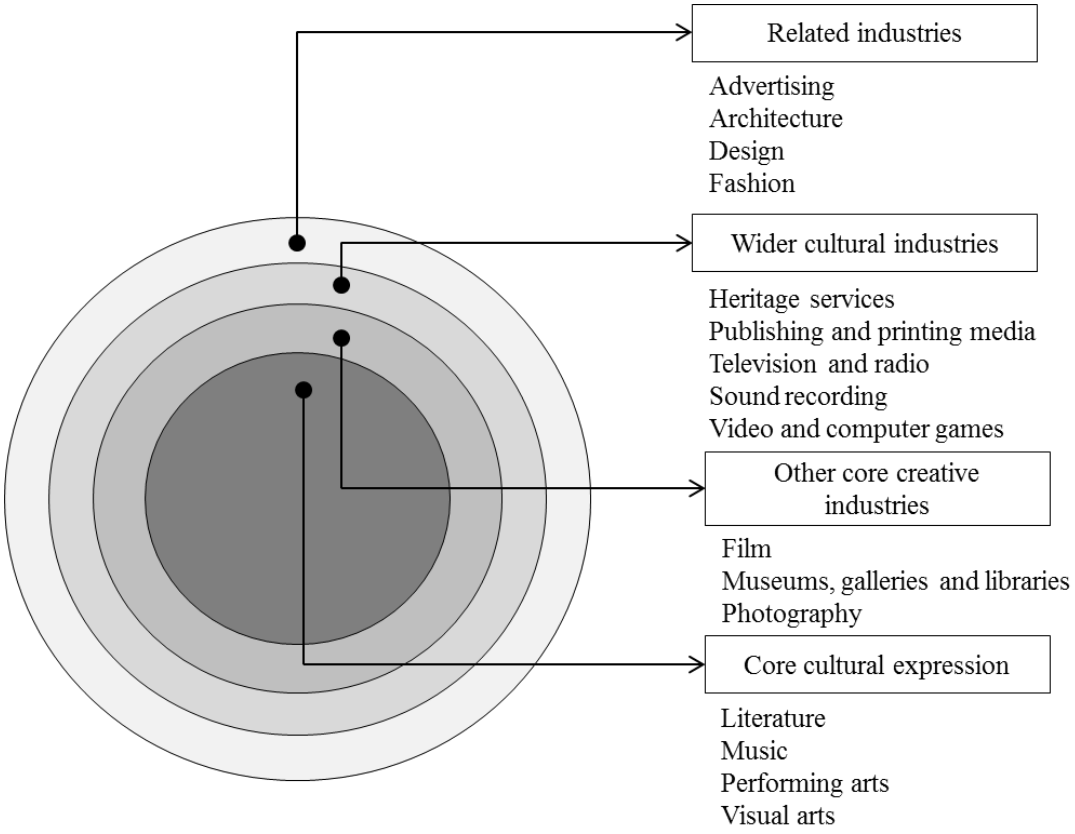

Figure 2.5: Modelling the cultural and creative industries: Concentric Circles Model
Source: Adapted from Throsby (2008b:149-150) and UNESCO (2013a:23)

The centre of the concentric model does not imply that individuals who are employed in those fields are apex to the hierarchy of creativity but rather that they are the social process of creativity (UNESCO, 2013a:23). The concept behind the model's design suggests that creative ideas originate in the core creative arts (sound, text and image) and that these ideas diffuse outwards into various layers or 'concentric circle' (Throsby, 2008c:220). The proportion of cultural to commercial content declines as each layer moves further from the core creative arts (Throsby, 2008c:220). Therefore, instead of using creative arts as the core of the model, UNESCO (2013a:23) adapted the model by renaming its core to 'cultural expression', since 'cultural expression' emerges more as a social process from a community context where creativity itself is regarded as being social. According to The Work Foundation (2007:104), the core represents a field that invokes copyright protection and commercial outputs that possess a high degree of expressive value. The second layer involves mass production of expressive output, while the use of expressive output is essential to the performance of sectors in the third layer (The Work Foundation, 2007:104). The last layer represents manufacturing and service sectors that benefit from and exploit the expressive outputs generated by the creative industries (The Work Foundation, 2007:103).

The Concentric Circle Model differs from other models in that it regards advertising, architecture, design and fashion as related industries, whereas the DCMS model and Americans for the Arts Model sees them as core cultural and creative industries. In similarity with the UIS Trade-related model, advertising is seen as a related cultural good or a borderline good.

2.5.3.4. UIS Trade-Related Model

The UIS Trade-Related Model was developed by the United Nations Educational, Scientific and Cultural Organization (UNESCO) and is based on cultural goods and services that enter the international trade (Throsby, 2007:2).

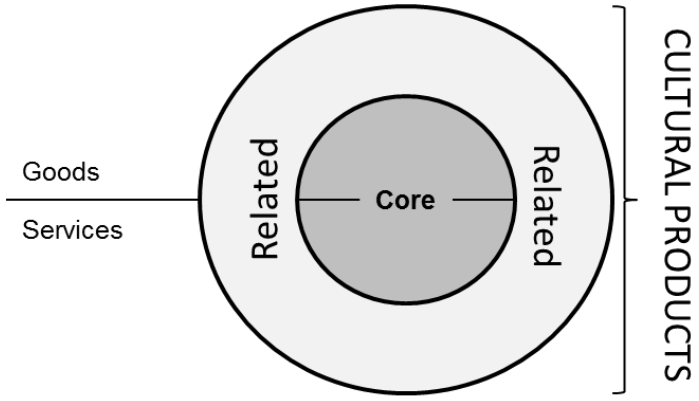

Figure 2.6: The composition of cultural products
Source: Adapted from UNESCO Institute for Statistics (2005:14)

In 1945 the Constitution of UNESCO was adopted by 20 countries and on 4 November 1946 the constitution came into effect (UNESCO Institute for Statistics, 2005:2). One of the five principal functions of UNESCO is to perform prospective studies on education, science, culture and communication (UNESCO Institute for Statistics, 2005:2). In 1999, UNESCO established the Institute for Statistics (UIS) to improve their statistics programme to adjust better too increasingly complex and rapidly changing social, cultural, political and economic environments (UNESCO Institute for Statistics, 2005:2). Since it was the UIS's responsibility to provide policy-related statistics on social and cultural environments, a Framework for Cultural Statistics (FCS) was developed to serve as the basis for defining the culture and scope of cultural products, referred to 'as the output of cultural and creative industries' (UNESCO Institute for Statistics, 2005:14). As a product of the FCS, the UIS trade-related model identifies two categories of cultural products, namely 'core' and 'related' (see Figure 2.6). The core cultural products are those that are directly connected to or associated with

the cultural content, whereas related cultural products relate to services, equipment and support material used/provided in the creation, production and distribution of core cultural products (UNESCO Institute for Statistics, 2005:14). Core cultural products are also connected to intellectual copyrights and include goods and services such as books, audio-visual services, copyright loyalties, recordings, visual arts, video games, heritage products, and newspapers and periodicals (UNESCO, 2013a:21). Related cultural goods and services include advertising, audio-visual equipment, music instruments, information services and architectural services (UNESCO, 2013a:21). Similar to the WIPO copyright model, related cultural products can be referred to as those products/services found in interdependent copyright industries (Siwek, 2014:5). The Creative Industries model of Singapore and the UIS Trade-Related Model also identifies creative industries to be a wider view/concept of traditional cultural industries (see MTI, 2003; UNESCO Institute for Statistics, 2005:14).

2.5.3.5. WIPO Copyright Model

The World Intellectual Property Organization's (WIPO) Creative Industries division was first set up in 2005 with the mission to study and measure the impact of intellectual property policies and practices on creative industries (Márquez-Mees, Funes & Yaber, 2006:95; Wang & Wu, 2011:10). Activities of this division included engaging with creative industry stakeholders, measuring the creative potential of nations, quantifying the economic contribution of creative activities by developing creative tools for enterprises and entrepreneurs, and assisting creative content creators in benefitting from their intellectual property assets (Jamaica Intellectual Property Office, 2011:internet; Wang & Wu, 2011:10; WIPO, 2015a:internet). The division became a driving force behind several international copyright-based industry reports and studies, including countries such as Mexico (Márquez-Mees *et al.,* 2006), Jamaica (James, 2007) and South Africa (Pouris & Inglesi-Lotz, 2011). The model used in many of their reports and activities is their own WIPO Copyright Model.

The WIPO Copyright Model solely focuses on those economic activities which give rise to intellectual property rights, whereby creative industries lie at the base of copyright (UNESCO, 2006a:5). 'The copyright legislation is part of the wider body of law known as intellectual property...' (WIPO, 2016:3). The term intellectual property is broadly referred to as creations brought forth by the human mind (WIPO, 2016:3). Unlike other cultural and creative industry models, the WIPO copyright model has a very restrictive view of cultural industries and sees creative industries as copyright-based industries (WIPO, 2015a:internet, 2015b:49-50). The WIPO Copyright Model outlines four groups of copyright-based industries based on their level of dependence on copyright, namely core, interdependent, partial, and the non-dedicated support industries (Radulović, Popović & Aleksić, 2014:7). The core

copyright-based industries include advertising, collecting societies, film and video, music performing arts, publishing, software (including video games), television and radio and visual and graphic art (UNESCO, 2013a:21; Wang & Wu, 2011:10). These industries are primarily engaged in the production and decimation of new copyright material. Partial copyright industries are a disparate collection of industries whose products only partly are or contains copyrighted material such as architecture, clothing and footwear, design, fashion, household goods, furniture, games and toys (Siwek, 2016:4). Interdependent copyright industries are those involved in the production, manufacture, and sale of equipment and whose primary function is to facilitate copyright matter in the creation, production and usage phase (Siwek, 2014:5). Interdependent copyright industries include manufacturers, wholesalers and retailers of CDs, DVDs, Blu-ray, and dependent products such as photocopiers, paper, blank recording material, and other consumer electronics (Siwek, 2014:5). Lastly, non-dedicated support industries refer to those responsible for the distribution of copyright material to businesses and consumers such as transportation and telecommunication services (Siwek, 2014:5).

2.5.3.6. Americans for the Arts model

Americans for the Arts (2015b:internet) is a non-profit organisation for advancing the arts. Their mission is to serve, advance, and lead the network of organisations and individuals who cultivate, promote, sustain and support the arts in America (Americans for the Arts, 2015b:internet). The organisation was founded in 1960 and is recognised today as the leading non-profit organisation for advancing arts and art education in the United States of America (Americans for the Arts, 2015b:internet). The Organisation also approaches creative industries very conservatively in that they only include art-centred businesses involved in the production and distribution of the arts (Americans for the Arts, 2015c:internet). Their model includes creative industries such as non-profit museums, symphonies, and theatres to for-profit design, film and architecture companies (Americans for the Arts, 2015d:internet). Based on the 'Creative Industries: Business & Employment in the Arts' report by Americans for the Arts (2015a:2), creative industries are categorised into six primary sectors comprising several sub-sectors, namely:

- Museums and collections
    - Museums
    - Zoos and Botanical
    - Historical Society
    - Planetarium

- Performing Arts
    - Music
    - Theatre
    - Dance
    - Opera
    - Services and facilities
    - Performers that are not elsewhere classified
- Visual arts and photography
    - Visual Arts
    - Crafts
    - Photography
    - Services related to visual arts and photography
- Film, radio and television
    - Motion pictures
    - Television
    - Radio
- Design and publishing
    - Advertising
    - Design
    - Publishing
    - Architecture
- Art schools and services
    - Arts councils
    - Art schools, institution and instructions
    - Agents

Where this model differs from other creative industry models is in the exclusion of computer programming (software and video games) and scientific research as a means to guard against overstatement of those sectors (Americans for the Arts, 2015d:internet).

2.5.3.7. Other important creative industry models

Not as widely recognised or popularised as the models mentioned above for their industry, academic or historical relevance, the following models provide additional insight into the creative industries and should therefore not be excluded.

The first is the John Howkins' Model of creative industries. According to Howkins (2001:116), the core of a creative economy consists of creative industries that deal with turning new and innovative ideas into products. The growth of the creative economy has also meant that IP Laws, specifically patents and copyright, have become important factors in almost all economic activity (Howkins, 2005:35). Howkins' (2001:116) model identifies 15 creative industries that deal with turning new and innovative ideas into products and are subject to IP laws, namely: advertising, architecture, arts, crafts, design, fashion, film, music, performing arts, publishing, research and development (R & D), software, toys and games, television and radio and video games.

The second model is the Conference Board of Canada/Statistics Canada Model, developed in 2008, which lists the industries and activities that contribute to Canada's creative economy (The Conference Board of Canada, 2008:23-24; Policy Research Group, 2013:5). Fourteen cultural industries are recognised in this model, including written media, broadcasting, film, advertising, heritage, libraries, architecture, performing arts, visual arts, design, photography, sound recording and music publishing, festivals and support services (Culture Statistics Program, 2007:29). The Conference Board of Canada/Statistics Canada Model also uses the term cultural industries synonymously with creative industries and the creative chain model - a model differentiating core cultural goods and services from non-core cultural goods and services (UNESCO Institute for Statistics, 2009:65).

The third and final model identified is the UNCTAD Model. UNCTAD is the United Nations body responsible for handling development issues in international trade (UNCTAD, 2015a:internet). Their mission is to guide the United Nations in making informed decisions and promote macroeconomic policies that are best suited to people-centred sustainable development and ending global inequalities (UNCTAD, 2015a:internet). The first United Nations Conference on Trade and Development was held in 1964 (UNCTAD, 2015a:internet). The 11th UNCTAD Ministerial Conference held in 2004 was a significant landmark for embracing the concept 'cultural industries' and introducing the concept into the economic and development agendas (UNCTAD, 2008:12). Creative industries were approached as those with 'any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible' (UNCTAD, 2004:4). The UNCTAD model classifies Creative Industries into nine categories, including:

- Traditional cultural expressions: Arts, crafts, festivals, events and celebrations.
- Performing Arts: Live music, theatre, dance, opera, circus, puppetry etc.
- Audio-visual: Television, film, radio and other broadcasting.

- New Media: Software, video games and digitally creative content.
- Creative services: Architectural, advertising, culture and recreation, creative R & D.
- Design: Graphic design, interior designing, fashion, jewellery and toys.
- Publishing and printed media: Books, press and other forms of publications and literature.
- Visual arts: Sculpting, vintage items, painting, drawing, photography and antiques.
- Cultural Sites: Archaeological sites, museums, exhibitions, libraries etc.

In conclusion, it is undeniably evident that many similarities are shared among these models and those mentioned as being popular. All models seem to categorise cultural and creative industries into sectors and/or sub-sectors. For a visual comparative summary of all the mentioned models, see Table 2.7.

Table 2.7: Comparison of cultural and creative industry models

Industries	Cultural and creative industry models								
	DCMS Model	Symbolic Texts Model [a]	Concentric Circles Model [b]	WIPO Copyright Model [c]	UIS Trade-Related Model [d]	Americans for the Arts Model	John Howkins Model	Conference Board of Canada/ Statistics Canada Model	UNCTAD Model
Advertising	X	X	O	X	O	O	X	X	X
Architecture	X		O	O	O	O	X	X	X
Design	X		O	O		X	X	X	X
Fashion	X	O	O	O			X		X
Film and video	X	X	X	X	X	X	X	X	X
Hardware (audio-visual and photographic equipment, musical instruments etc.)		O		O	O				
Heritage services			O		X			X	X
Literature (books)		O	X	X	X				X
Music	X	X	X	X		O	X	X	X
Museums, galleries and libraries			X			X		X	X
Publishing and print media	X	X	O	X	X	X	X	X	X
Software	X	O		X			X		X
Sport		O							
Performing arts (theatre and dance)	X	O	X	X		X	X	X	X
Television, radio and broadcast media	X	X	O	X	X	X	X	X	X
Video games	X	X	O	X	X		X		X
Visual art, craft, photography	X	O	X	X	X	X			X

Art and craft schools and related services						X			
Support and information services					O	O		X	X
Consumer electronics				O					
Research and development							X		X
Toys and games (board and card)				O			X		
Festivals and related events								X	X
Sound recording			O	O					

Notes: X = Core cultural and creative industries; O = Peripheral cultural activities [(a)], Borderline cultural industries [(a)], Wider cultural industries [(b)], Related industries [(b)], Interdependent copyright industries [(c)], Partial copyright industries [(c)], and Related cultural goods and services [(d)]

Source: Researcher's own compilation

An examination of Table 2.7 reveals that several models included advertising, architecture, design, literature, film and video, museums, galleries and libraries, music, publishing and print media, performing arts (theatre and dance), television, software, radio and broadcast media, video games, and visual arts, crafts and photography as core cultural and creative industries. Alternatively, many models agree that industries such as sport, sound recording, consumer electronics, musical instruments, and hardware associated audio-visual and photographic equipment are relatable cultural and creative industries.

It is also evident that several sectoral differences exist between the models when viewed side by side. According to UNESCO (2013a:21), different models are developed 'as a means of providing a systematic understanding of the structural characteristics of the cultural and creative industries'. Countries, regions, cities or communities 'often challenge and seek to reshape prevailing models to suit the reality of their local context, culture and markets' (UNESCO, 2013a:21). Models may also differ based on differences in mapping (BOP Consulting, 2010:11) or based on their geographical importance (Biox, Lazzeretti, Capone, Propris & Sánchez, 2010:2). Mapping refers to a whole series of analytic methods used for collecting and presenting information on a range and scope of specific industries (BOP Consulting, 2010:11). In creative industry mapping, this means giving an overview of creative industries and their economic value (BOP Consulting, 2010:11). Limitations of statistic research or failure to accurately capture some industries are often encountered when mapping creative industries linked to challenging geographical areas (countries without appropriate funding or infrastructure). Concerning geographical importance, while some individual creative industry sectors might not be strategically important for one country they might be for another (Joffe, 2010:7). To expand on what is meant by this, the following section serves to provide an examination of the geography of creative industries.

2.5.4. The geography of creative industries

Little research has been done on the geography of creative industries (Biox *et al*., 2010:2). There are however a few availability studies that use data from different regions and countries for doing cross-country/region comparisons (see Belussi & Sedita, 2013; Biox *et al.,* 2010; De Propris, Chapain, Cooke, MacNeil & Mateos-Garcia, 2009; Lazzeretti, Biox & Capone, 2008; Power & Nielsen, 2010). Many comparisons divide creative industries into traditional and non-traditional creative industries (Biox *et al.*, 2010:2). Traditional creative industries revolve more around cultural-based activities, including publishing, architecture, physical arts and performing arts, film music and engineering studios (Belussi & Sedita, 2013:94). Non-traditional creative industries have more to do with multi-media activities and information technologies and have a strong 'digital culture' imprint such as advertising,

research and development, and software and computer services (Belussi & Sedita, 2013:98).

Research by Biox *et al.* (2010:2) shows that European countries such as France, Italy and Spain specialise more in traditional creative industries than Great Britain, which focuses more on non-traditional creative industries. One way of determining this is by looking at employment rates. Countries such as Italy and Spain have more people employed in traditional creative industries, particularly in printing, publishing, architecture and engineering, than in non-traditional creative industries (Belussi & Sedita, 2013:98). In Europe, Germany has the largest creative industry workforce, followed by the UK and France (Davies, 2015:internet). Proportionate to overall employment, Sweden has the highest number of people employed in the creative industries (8.9 percent), followed by Finland (8.2 percent) and the UK (Davies, 2015:internet).

Globally, the Asia-Pacific (APAC) region has the world's biggest cultural and creative industries market with 12.7 million people employed in cultural and creative jobs and generating US$ 743b in revenue (EY, 2015:16). Europe takes second place with US$ 709b in revenue and 7.7 million jobs and is followed by North America (US$ 620b in revenue and 4.7 million jobs), Latin America and the Caribbean (US$ 124b in revenue and 1.9 million in jobs) and Africa and the Middle-East (US$ 58b in revenue and 2.4 million jobs) (see Figure 2.7).

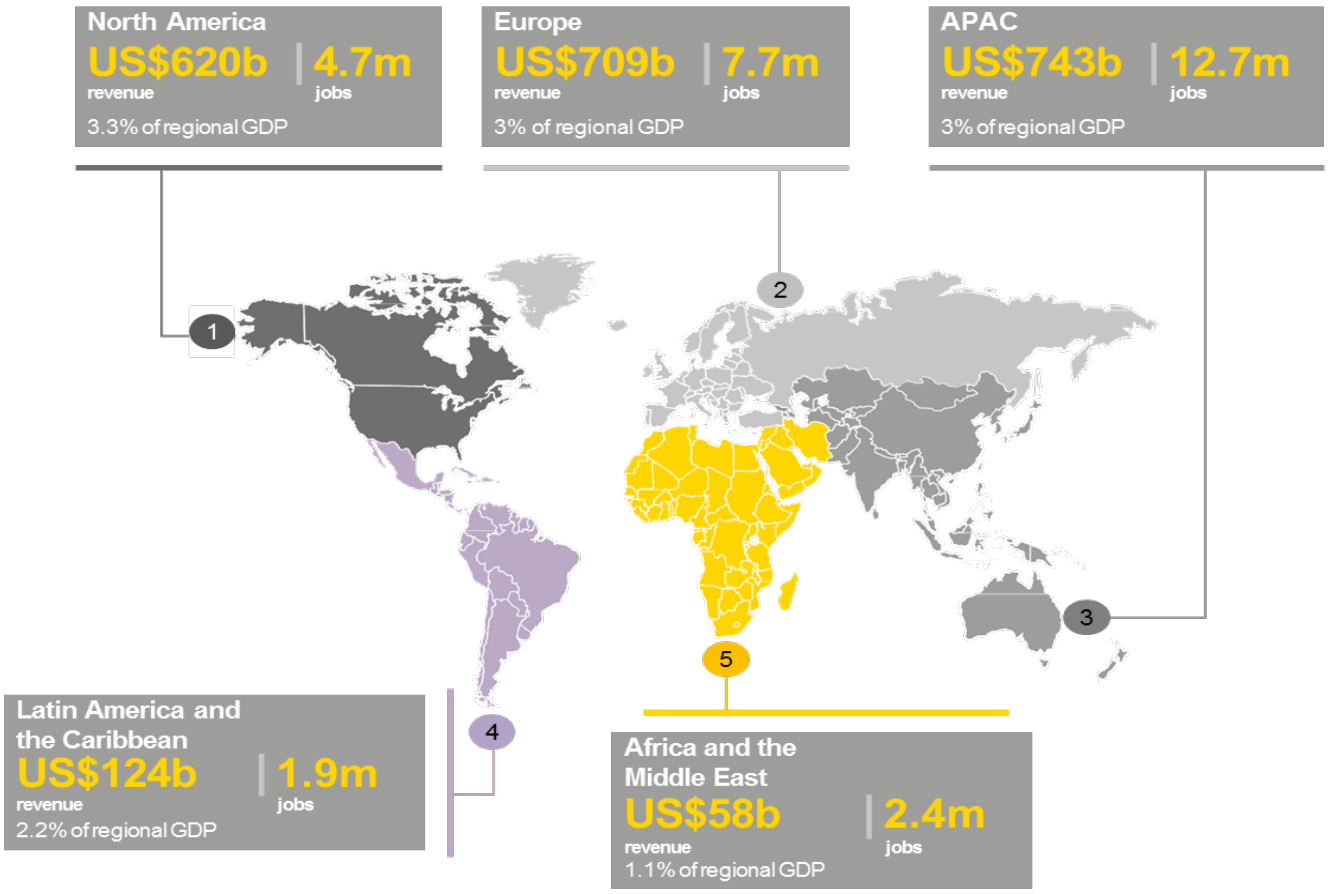

Figure 2.7: Culture and creative industries (CCI) strongholds (**Rounded Figures)**
Source: Adapted from EY (2015:17)

A problem faced when measuring Gross Domestic Product (GDP), extending to global creative industry revenues and employment, comes in the shape of informal economies or shadow economies (Schneider, Buehn & Montenegro, 2010:8). Informal economies are defined as the 'market-based production of goods and services, whether legal or illegal, which escapes detection in the official estimates of GDP' (Smith, 1994:18). Informal economies are hidden from official view and are associated with the paid provision of goods outside formal arrangement (content traded by creators using informal distribution channels) and involve high levels of protected materials pirating (unauthorised manufacturing or redistribution) (EY, 2015:28).

Unfortunately, the informal economy has a dominant presence in the distribution of cultural content in developing countries and as such can leave content creators ill/unrewarded and can discourage future participation and growth (EY, 2015:28). Regions such as the Asia-Pacific, Africa, and Latin America are particularly guilty of harbouring informal economies, with many of the somewhat 1.2 million jobs found in performing arts (56%), books (31%),

and gaming, music and movies (13%). As for informal sales, books came in at first place (32%), video games at second (26%), music at third (16%) and movies at fourth (12%) (EY, 2015:28).

The informal sales of video games are particularly high in African countries. Unfortunately, the availability of research done on creative industries in Africa is scarce (Joffe & Newton, 2009:237). This does not exclude South Africa, as limited research exists on these industries and their relationship with urban and rural landscapes (Gregory, 2016a:158). It is also evident that the majority of African, Asian and Latin American countries are developing or third world countries (United Nations, 2014:146) and could potentially explain the many challenges faced by creative industries when confronting informal economies. To better understand how developing countries, as well as developed countries, approach creative industries, refer to the following section.

2.5.5. Creative industries in developed and developing countries

Developing and developed countries both share in the production of creative output. How much they contribute to the global creative economy, however, can vary among classification systems and organisation (De Beukelaer, 2014:234). For example, in 2010, UNCTAD (2010:311) revealed that 41 developed countries accounted for 51.18% of the global creative economy (UNCTADstat, 2012:internet). That same year the Development Aid Committee (DAC), the committee assembled by the Organisation for Economic Co-operation and Development (OECD), revealed that developed countries accounted for 62.71% of global creative goods exports compared to the 37.29% of developing countries (De Beukelaer, 2014:234). Also, in 2010, the Human Development Report (HDR) showed that developed countries accounted for 60.81% of global creative goods exports while developing countries accounted for 37.25% (Gidwitz, Heger, Pineda & Rodríguez, 2010:16-17; United Nations Development Programme [UNDP], 2010:28). What is interesting however is that in 2010 China, a developing country, was the single most significant exporter of creative goods – accounting for 25.51% of the total global exports (De Beukelaer, 2014:234; UNCTAD, 2011:internet).

After 2010 developing countries equalled and surpassed developed countries in total global exports of creative goods. According to statistics provided by UNCTAD in 2011, developing countries contributed to 50% of the global total of creative exports (UNCTAD, 2011:internet). In 2012, developing countries reached a total share of 57% of world exports of creative goods and became the leaders in creative exports (UNCTAD, 2015b:1). This means that developing countries are catching up on the importance of creative industries. To understand

how developing and developed countries approach creative industries, the following section provides a brief overview of important creative output and creative industry models used in some of these countries.

2.5.5.1. Creative industries in developing countries

The developing countries' share of creative export goods is growing faster than that of developed countries (UNCTAD, 2015b:1). China, the leading exporter of creative goods, is a great example of this. Between 2002 and 2011 China showed and annual growth rate of 14.7% (UNCTAD, 2011:internet). Globally, in that same period, overall growth rates of developing-country exports of creative goods averaged 12.1% (UNESCO, 2013a:10). In 2012, the top five exporters of creative goods in developing countries were China, Hong Kong, India, Turkey and South Korea (UNCTAD, 2015b:vii). A summary of the models/sectors that defines the creative industries in these developing countries can be seen in Table 2.8.

Table 2.8: Top five developing countries of exporters of creative goods

China (Manso, 2014:ii-iv)	**Hong Kong** (Census and Statistics Department, 2016:3)	**India** (Goswami, Revi & Anan, 2013:7; Sheetal, 2015:internet)	**Turkey** (Lazzeretti, Capone & Seçilmiş, 2014:9)	**South Korea** (Choi, Takashi & Tsustu, 2010:1322)
• Advertising • Architecture • Art and antiques market • Industrial design and crafts • Fashion design • Film • Software • Video games • Music • Performing arts • Publishing • Radio, TV, video and photography	• Art, antiques and crafts • Cultural education and library, archive and museum services • Performing arts • Film, video and music • Television and radio • Publishing • Software, computer games and interactive media • Advertising • Design • Architecture • Amusement services	Traditional creative economy activities: • Arts, crafts, design, architecture, advertising, antiques, film, video, music, performing arts, radio, publishing Heritage preservation activities • Traditional medicine, handicrafts and textiles, folk artefacts Media and entertainment industry • Television, print, films, radio, music, animation and VFX, Gaming, digital advertising	• Publishing • Software and programming • Design • Movies and video • Advertising • Entertainment and arts (cultural education) • Music • Radio and TV • Photography • Architecture	• Publishing • Film and video • Television and radio • Software and computing • Information service • Advertising • Architecture • Design • Photography • Social & industry policy administration • Arts, antiques & crafts, leisure services

Source: Researher's own compilation

By examining Table 2.8, it is evident that art, antiques and crafts, architecture, advertising, design, film and video, publishing, and radio and TV are all reoccurring creative industries included in the mentioned developing countries. It is also evident that video games, software and music are important creative sectors in many of these models. What is more, besides India, all the models can be closely related to the DCMS model, with some industries being added (Social and industry policy administration in South Korea's model or cultural education in Hong Kong's model) or excluded (Fashion in Hong Kong's model or interactive leisure in China's model).

Some interesting facts were revealed concerning the countries mentioned above. Starting with Turkey, creative employment in the country accounted for 2% of total employment in 2011, and from 2008 to 2011 their creative employment rate increased by 38% (Lazzeretti *et al*., 2014:8). The highest performer of creative industry growth in Turkey was achieved by the 'software and programming' sector which grew by 487% between 2008 and 2011 (Lazzeretti *et al*., 2014:8). Concerning India, they have the third largest television market in the world and has a film industry that produces more than 800 films annually (EY, 2015:74; UNESCO, 2013a:69). India is also the world's second-largest market for YouTube music videos (EY, 2015:34). What is more, India's media and entertainment industry serves as a vast and growing consumer market that contributes greatly to its national economy (UNESCO, 2013a:69). Video gaming is seen as an important industry segment that could propel growth in the media and entertainment industry for the country (ICT Connect, 2010:internet).

Moving on to Hong Kong, this Chinese special administrative region has around 40 500 cultural and creative industry-related establishments (Create Hong Kong [CreateHK], 2016:1). The combined value of this establishment is worth around $110 Billion and represents 5% of the country's GDP (CreateHK, 2016:1). In 2012, Hong Kong was ranked the developing country with the highest importation of all creative goods, with China second, India third, Turkey in fourth and South Korea in fifth (UNCTAD, 2015:7). In that same year, South Korea was ranked among the top five developing countries to export personal, cultural and creative services (UNCTAD, 2015:10). In 2013, South Korea placed sixth in the world when it came to intellectual property rights revenue - estimated at a value of $5 billion (UNCTAD, 2015:11). Like India, South Korea also has a productive film and television industry (EY, 2015:18). This is also true for China with its film and television industry generating 78% more added value than the rest of its economy back in 2011 (EY, 2015:18). China and South Korea also share a mature video gaming industry, and in China, it grew by 35.1% between 2011 and 2012 (EY, 2015:33).

As for a brief overview of some developing countries in Africa, Nigeria is the second largest employer in film production in the world, with more than 300 000 direct employees and generating US$500m-US$800m annually (EY, 2015:74). In 2013, with 25 feature films produced, Egypt was the largest film-producing country in Africa (EY, 2015:76). In South Africa, radio is the most accessed form of media with the country having roughly 240 communication stations in operation (EY, 2015:78). In East Africa, Kenya is the leader in information communication technologies (ICTs) (mobile technologies and internet access), accounting for 3.2 percent of Africa's internet usage (H*i*vos, 2016:10). Nonetheless, many African countries, including other developing countries, operate within shadow economies. These economies can prove to be quite challenging for local artists to enter the market and creative industries to succeed. This is but one obstacle faced by developing countries when planning or being in the process of developing the local creative industry sector (UNCTAD, 2008:12). Fortunately, the creative industry is also an ever-evolving concept and can provide vast and varies opportunities to developing countries as well (UNESCO, 2013b:internet).

2.5.5.2. Opportunities for and obstacles to creative industries in developing countries

The creative industry is a mix of both private market and state/government-owned activities and as such plays an important social, political, and cultural role (Araya & Marber, 2013:212). Tension comes in when the 'commodification of culture' and 'commerce' is introduced, since it is challenging to create content that is appealing both locally and globally without it becoming decontextualized and meaningless (Araya & Marber, 2013:212). According to Barrowclough and Kozul-Wright (2008:32): 'striking a balance between exit, voice and diversity are the challenges facing local policy-makers in the developing world, the international development community, and the developed world alike'.

Concerning some of the other obstacles facing the creative economy in a developing world, UNCTAD (2008) had the following to stated:

> Many opportunities for value creation, employment expansion, and technological upgrading and market development in the creative sector have gone unrealised in developing countries because of obstacles such as lack of investment, lack of entrepreneurial skills and inadequate infrastructure to support the growth of the creative industries. (p. 40)

A lack of support, investment, and infrastructure makes it difficult for developing countries to penetrate existing and international distribution channels and thus requires many entrepreneurs to set up their networks (Araya & Marber, 2013:212). The conditions needed to support creative industries require high levels of human capital, developed consumer

markets that understand creative content, and institutional collaboration (Oakly, 2006:262). To identify where support is needed most, one should look into the areas that are important for growing creative industries in developing countries, including policies concerning digital networks, copyright, infrastructure, finance, intermediaries, partnerships and networks (see Oakley, 2006:257-259). The inner workings of these areas are linked towards strengthening innovative small and medium enterprises in the global economy and functions as either a challenge or opportunity for creative industries in developing countries (OECD, 2004:5-6). See below for a brief examination of these areas.

- **Digital Networks**

Digital networks are crucial for making a wide variety of cultural products available around the globe. It is important to grow digital infrastructure such as accesses to high-speed broadband networks, information technologies and communication technologies, as it enhances service delivery, encourages the integration of creative industries into national trade development strategies and allows creators to include their creations in local and international value chains (Belete, 2016:65; Flew, 2014:12). Digital media can also empower small-scale producers in informal or developing economies by allowing them to have access to cheaper production and distribution channels for creating and selling their cultural content. Unfortunately, internet penetration in developing nations is still low and will remain relatively stagnant for the near future (Araya & Marber, 2013:2013). Policies that could promote the growth of digital networks in developing countries include investing in education and human capital related to creative industries, improving digital infrastructure and access to high-speed broadband, advancing data gathering to understand the size and significance of these industries, and establishing a creative cluster to identify and link those in both the formal and non-formal sectors of the creative industries (Flew, 2014:12)

- **Copyright**

It is not uncommon to find creative content ‘stolen’ from countries that are financially poor but culturally rich (Araya & Marber, 2013:2014). It is particularly important that these countries be made aware of legal developments on this matter through education as a way to avoid being taken advantage of (Wallis, as cited by Araya & Marber, 2013:214). Education and training are considered by many governments to be the key towards growing creative industries in the long run (Madsen, 2007:7). Wallis (as cited by Araya & Marber, 2013:214) suggests ‘creative workshops’ to be organised in developing countries to consolidate creative exchange, to develop experience and to learn about obstacles and opportunities in creating and protecting creative content. Using workshops can help fulfil the need for copyright law to achieve a balance between incentivising creators and protecting the public

interest, also known as a trade-off between efficient production and efficient consumption (Watt, 2004:156).

- **Infrastructure**

Creative industries perform better in countries with applicant infrastructure and where a broad understanding and respect exists for the value of creative and cultural work (United Nations Economic and Social Council [ECOSOC], 2013:2). Unfortunately many developing countries lack the infrastructure, domestic policy and business environment to harness the economic potential of these contents and their industries (Belete, 2016:60). This is troublesome since many developing countries are often rich in cultural content such as arts, music, dance and literature (Belete, 2016:60). According to Belete (2016:62), developing governments can improve the performance of these creative industries by 'strengthening the infrastructure that supports the creative economy improving access to finance; facilitating the formation and growth of creative clusters; strengthening the interface between the creative industries and other economic activities; and determining an appropriate level of copyright protection.' Cultural heritage, cultural and creative industries, sustainable cultural tourism, and cultural infrastructure can also be used strategically as a tool for generating revenues in 'developing countries with their often-rich cultural heritage and substantial labour force' (UNESCO, 2012:3).

- **Finance**

One of the impediments to starting a creative business is funding or having access to finance (Dervojeda *et al*., 2013:23). Finance is important because it is costly to acquire and maintain specialised business support, technological input, working capital, management development, skilled creative workforce, marketing, copyright protection, rights management and policies (Araya & Marber, 2013:214). The necessity of obtaining multiple permits/ licenses to produce creative content from multiple industry regulators can also be very costly (Cunningham, Ryan, Keane & Ordonez, 2008:73). The problem is that banks do not necessarily have the expertise to analyse creative business models (for viability, feasibility and profitability) and cannot or do not always adequately value their intangible assets (Dervojeda *et al*., 2013:23). Financial and economic crisis only make these situations worse since it is usually the time when investments need to adapt (European Union Open Method of Coordination [OMC], 2012:23-24). Alternatively, Institutional networks, government and Informal people networks (specialist consultants) are very important in levering financial support and developing connections towards obtaining financial resources (Cunningham *et al*., 2008:76). Their support can assist in alleviating some of the burdens associated with research, development, education, and regulations needed to grow the creative industries. A

lack of copyright regulation and remuneration, however, may damage the profit margins of local talent and creative business, discouraging entry and future support (Greffe, 2006:14).

- **Intermediaries, partnerships and networks**

Initial mapping is needed to establish an understanding of creative industries (Barrowclough & Kozul-Wright, 2008:294). This includes gathering intelligence on the scope, scale and profiles of the creative sectors (Collins & Cunningham, 2017:112). The availability of a mapping document that monitors and promotes creative industry development and policy is a particular weakness of many developing countries (Belete, 2016:70). Without initial mapping, the argument for investment, political support and stronger sector-focused partnerships cannot be made efficiently (Barrowclough & Kozul-Wright, 2008:294). Strong partnerships among local governments, institutions, non-profit organisations, creative businesses and decision makers are important as they can positively affect the achievements or outcomes of creative industries (Mussapi, 2013:32). Mapping also stimulates the efforts of intermediaries, such as government, creative businesses and non-government organisations (NGOs), to maximise the potential of the creative economy (Barrowclough & Kozul-Wright, 2008:294). In order to progress from mere mapping, it is important for intermediaries to translate mapping knowledge and intelligence effectively to decision-makers and understand working together through networking (Barrowclough & Kozul-Wright, 2008:294).

Mapping of the creative sectors in developed countries, however, is not usually as restricted or ill-researched as those found in developing countries. That is why so many of the popular models mentioned in section 4.5 were developed in or based on developed countries such as the United Kingdom (UK) or the USA.

2.5.5.3. Creative industries in developed countries

Creative industries thrive better in developed countries because of legal frameworks that protect the rights of creators, allowing industries to build from the work of thousands of creators (EY, 2015:6). One of the biggest contributors to creative sector worldwide is the UK. UK-based countries, such as Scotland, use the DCMS model to categorise their creative industry sectors (see Carr, 2009:3). The UK's Creative Industries were worth £63.425 billion in 2010 and grew to £91.828 billion in 2016. (Creative Industries, 2017:internet). In 2015, the UK's creative industries were worth £8.8 million an hour (Creative Industries, 2015:internet). Also in 2015, the Secretary of State for Digital, Culture, Media and Sport, Sajid Javid, had the following to say about the UK's creative industries:

> The UK's Creative Industries are recognised as world leaders around the globe and today's figures show that they continue to grow from strength to strength. They are one of our most powerful tools in driving growth, outperforming all other sectors of industry and their contribution to the UK economy is evident to all. (DCMS, 2015c:internet)

The biggest/most lucrative of creative industries in the UK is the IT, Software and computer service sector, followed by film, TV, video, radio and photography, advertising and marketing, and publishing (Creative Industries, 2017:internet). It is also well-known that the UK has a long history and reputation for making world-class video games with roughly 2,175 active video-game companies in 2017 (The Association for UK Interactive Entertainment [Ukie], 2017:internet). They have the 5th largest video gaming industry in the world worth $4.2 billion in spending for the year 2017 (Ukie, 2017:internet). The all-time most successful worldwide entertainment product, Grand Theft Auto 5, also came from the UK and grossed US$ 1 billion worldwide in just three days (EY, 2015:50).

Canada is another example of a developed country with a globally renowned video gaming industry (EY, 2015:59). According to the Creative Canada Policy Framework, video games are one of five key figures contributing to the creative economy, including film and television, music, book and augmented/virtual reality (Canadian Heritage, 2017a:8). Although Canada's $54.6-billion arts and culture industry is small compared to the UK's creative industry (see Canadian Heritage, 2017b:internet), the Canadian video gaming industry is twice that of the UK and half that of the US (Canadian Heritage, 2017a:8). Concerning the states, the US is the largest exporter of creative goods among developed countries and second largest worldwide only to China (UNCTAD, 2015c:internet; UNCTAD, 2015b:4). Other developed countries with the biggest creative good exports, arranged by market share, include Germany, UK, France, Switzerland, Netherlands, Japan, Belgium, Canada and Spain (UNCTAD, 2015a:3). For more information on the US, Canadian and UK models of creative industries refer back to section 2.4.5 on models of cultural/creative industries.

In 2015, the US creative industries were worth US$ 698 billion (Dodd, 2015a:internet). A US$171 billion of this can be contributed to the 76% of all American leisure travellers (129.6 million adults) who participate in cultural/creative activities on their travels. Furthermore, the US has around 702 771 arts-related businesses in the creation and distribution of the arts (Americans for the Arts, 2015a:1). These numbers represent 3.9% of all U.S. businesses and employ roughly 2 909 382 workers (Americans for the Arts, 2015a:1). The majority of these businesses are found in publishing and design (244 990), followed by visual arts and photography (211 235), performing arts (115 683), film, radio and television (93 042), art

schools and services (20 980), and museums and collections (16 841) (Americans for the Arts, 2015a:1). In 2013, more than 14 million people were employed contributing to the US creative economy, representing 9.75% of all employment in the country (Nathan, Kemeny, Pratt & Spencer, 2016:5). Compared to Canada and the UK, the US has about five to six times more creative employees (Nathan *et al*., 2016:5). Canada, however, has a better ratio of creative employees to total employment than that of the UK and US (Nathan *et al*., 2016:5).

Creating job opportunities is one of the most important reasons why developed and developing countries wish to map and support the creative industries. This is particularly true for South Africa since creating new jobs is one of the number one priorities in the country (Snowball, 2016:internet). According to research done by South African Cultural Observatory and Statistics South Africa (Hadisi & Snowball, 2016:19), employment in cultural and creative industries account for 3.6% of the total employment in South Africa, resulting in about 563,000 jobs (South African Government News Agency, 2016:internet). As a country that exhibits both developing and developed trades (Ligami, 2015:internet), and one that has recognised the cultural and creative sector's potential to alleviate poverty and grow the economy (Culture, Arts and Jobs [CAJ], 2008:13), it is important to understand what is currently being done in the field of creative industries in South Africa.

2.5.6. Creative industries in South Africa

The South Africa government is one of the few African country governments that has recognised and committed support to their creative industry sectors. The first programme to identify the economic importance of the creative industries, mainly due to accelerated growth in the crafts and film sector, was the Accelerated and Shared Growth Initiative of South Africa (AsgiSA) (Joffe & Newton, 2007:3). The acknowledgement of the creative industries by this initiative was a direct result of the Department of Arts and Culture's (DAC) efforts to remedy the neglect these sectors received from the mainstream trade and industry policy (Joffe & Newton, 2007:3). It all primarily started when the Department of Arts, Culture, Science and Technology (DACST) initiated the Cultural Industries Growth Strategy (CIGS) process (Joffe & Newton, 2007:3). This led to 'Creative South Africa: A strategy for realising the potential of the Cultural Industries' in 1998 whereby four creative sectors were identified. The four sectors included the music, film and television, publishing, and crafts industry (Cultural Strategy Group [CSG], 1998:2). This report aimed at creating awareness of the significance of creative industries, to set realistic targets and goals for cultural development, and to map out how 'creative South Africa' can be implemented (CSG, 1998:8). Unfortunately, although some support is provided, many creative industries remain

neglected in the mainstream trade and industry policy (Joffe & Newton, 2007:3). A later creative industry report was compiled in 2007 and identified six sectors including film, craft, music, performing arts, visual arts and cross-cutting sectors (design, heritage and cultural tourism) (CAJ, 2008:61-63). For the purpose of developing a practical framework for expanding video game exhibitions as part of the creative industries in South Africa, this model will be appropriate to identify the current sectors of creative industries in South Africa and the need for including the video gaming industry.

Nonetheless, the cultural and creative industries have become a prominent element of economic strategy and policy dialogue in South Africa (Wangen, 2017:4). Although a relatively new sector of the economy, these industries have shown rapid growth. The cultural and creative industries contribute more than 3% annually to South Africa's Gross Domestic Product (GDP) and are worth R90 billion to the economy (Snowball, 2016:internet; Snowball, 2017:internet). This is to a large extent the result of publically funded arts, culture and heritage projects, events and organisations (Snowball, 2017:internet). The strategic function of these projects, events and organisations is often underestimated and requires artistic practitioners, researchers and funders alike to critically evaluate their cultural/creative value and overall impact (Snowball, 2017:internet). Monitoring and evaluating these projects is essential to track progress and make financially sound projections, while also providing public and private investors with knowledge of and perspective on industry projects (Snowball, 2017:internet).

The problem, however, is that minimal research has been done determining the actual size and scope of creative industries in South Africa (Gregory, 2016a:161). The severe lack and poor quality of data currently available raises even more concerns for the future of creative industries in South Africa (Wangen, 2017:24). Many of the constraints facing the collection and availability of data has to do with a lack of capacity and resources in national statistical offices, a lack of trust to outsource local creative industry mapping studies, sensitive funding policies and the un-adaptable nature and slow pace of official national statistics (Snowball, Collins & Tarentaal, 2017:295). The sheer cultural and creative diversity in South Africa, ranging from the rural artists, dancers and crafters to professional ballet dancers and marketing executives, also plays a challenging role in data collection and industry mapping.

Constraints aside, one of the more comprehensive studies/mappings are done on creative industries in South Africa includes the 'Gauteng Creative Mapping Project' titled 'Gauteng's creative industries: an analysis' prepared by African Microeconomic Research Unit (AMERU) – Wits University and Culture, Arts and Jobs (CAJ) in 2008. The mapping document

identified 11,320 firms directly and indirectly contributing to Gauteng's creative economy and spread across ten creative industries including visual arts, performing arts, cultural tourism and heritage, multimedia, music, craft, audio-visual, print media and publishing, design and fashion (AMERU, 2008:8). The document also identified that Gauteng's Cultural and creative industries were valued at R33.3 billion per annum in turnover and created employment for over 182,000 people of which cultural tourism and heritage is the largest employer (AMERU, 2008:8).

Besides this provincial mapping document, little research is available on South Africa's creative industries as a whole. Many currently available research on creative industries in South Africa focusses on mayor cities such as Johannesburg, Cape Town and Durban (see Table 2.9 for references). The benefit to this is that Johannesburg, Cape Town and Durban are seen as the three most important creative city hubs of South Africa (Gregory, 2016a:161). Unfortunately, the extent of research done on these cities and especially South Africa in general is still lacking (Gregory, 2016a:161).

Table 2.9: Creative industry studies on three major South African cities

City	Title of study	Purpose of study	Authors
Johannesburg	Inner City Regeneration Charter	Charter for stakeholder working groups on addressing city focused issues.	Johannesburg City Improvement District (CID) Forum (2007)
	From fortress city to creative city: Developing a culture and the information-based sectors in the regeneration and reconstruction of the Greater Johannesburg area	An assessment and strategy to grow culture and the information-based sectors in Johannesburg	Dirsuweit (1999)
	Joburg creative industries sector scoping report	A report that investigate and assess creative industries in Johannesburg	Newton (2003)
	Creative industries and urban tourism: South African perspectives	To provide an examination between urban tourism and creative industries using the city of Johannesburg as reference	Rogerson (2006)
	Johannesburg ten ahead: A decade of inner-city regeneration	A book examining/uncovering the complexities behind Johannesburg's inner-city regeneration over a decade	Garner (2011)
	The small is big: Craft in the inner city of Johannesburg	To illuminate the significance of craft production to inner-city regeneration	Ndlovu (2011)
Cape Town	Creative industries, inequality and social development: Developments, impacts and challenges in Cape Town	To contribute to the debate regarding the role of creative industries in the urban economies of cities in the Global South with specific references to Cape town	Booyens (2012)

	Creative tourism in Cape Town: An innovation perspective	To identify creative experience-based tourism as a novel tourism product innovation in Cape Town	Booyens and Rogerson (2015)
	Innovation in high-technology SMMEs: The case of the new media sector in Cape Town	A case study examining innovations in new media firms situated in Cape Tow	Booyens, Molotja and Phiri (2013)
	Creative Industries	To provide an examination of creative industries in South Africa using sector case studies	Joffe and Newton (2012)
Durban	Creative industries, creative solutions: Developments in a work-integrated learning project in Durban	To report on work in progress on a demonstrator project in the form of a Creative and Cultural Industries (CCI) Studio/Work Laboratory	Carey and Gatfield (2009)
	Economic development and growth in Ethekwini: Creative Industries	To inform stakeholders of the latest developments and trends in Ethekwini by focussing on the creative industry sector	Aurelia Albert (2015)

Source: Researcher's own compilation

Booyens (2012:43) suggests that it is imperative for countries such as South Africa, in the global south, to direct creative industry objectives and research efforts towards socio-economic objectives for creating jobs and getting communities to participate. This type of objectives should also be implemented in cities towards attracting and growing creative tourism, renewing a city's image, and encouraging creative and cultural involvement and sustainability (Smith, 2005:23).

Market research, including monitoring and evaluation, also are very important strategies towards understanding and growing the video gaming industry in South Africa (Selander & Sydow, as cited by Cilliers, 2014:internet). Unfortunately, although considered by many of the popular cultural and creative industry models to be a core industry, the video gaming industry is not included in South Africa's creative industries as can be seen in 'Creative South Africa' and 'Gauteng Creative Mapping Project'. Reasons such as this are why it is extremely important to conduct research on the video gaming industry and to create awareness of its importance to greater creative economy.

2.6. Conclusion

It is undoubtedly evident that culture and creative industries can be a valuable asset to both developed and developing countries. Their potential to generate employment, economic value, reform cities, and grow tourism should be reason enough to support them. This was and still is particularly evident in developed countries where the first models emerged to map, support and grow creative industries. Creative industries are in an evolutionary stage of cultural industries as a result of strategic positioning (see Flew, 2012:9), digitalisation (see

Richards, 2012:3), reproduction technologies (see O'Conner, 2007:7), new information technologies (see Belussi & Sedita, 2013:98) and intellectual property right (DCMS, 1998:3). The success of the DCMS model (1998), the first model, sparked various new adaptations, as well as academic enquiry.

Unfortunately, it is not always the case in developing countries such as those found in Africa. It is understandable that mapping and supporting creative industries in developed countries are easier due to well-developed infrastructure, policies and regulatory support, while many developing countries lack these resources. However, it was identified that by focussing recourses on tourism, research, networking, education, regulations and policies, infrastructure and internet technologies toward promoting creative industries, many developing countries can take advantage of the said benefits (see Araya & Marber, 2013:212; Barrowclough & Kozul-Wright, 2008:294; Belete, 2016:60; Cunningham *et al*., 2008:76; Flew, 2014:12; Madsen, 2007:7; Oakley, 2006:257). Research in particular provides a significant foothold as it enables industry mapping to take place, provide market and industry-related knowledge and stimulate the efforts of intermediaries such as government, creative businesses and non-government organisations (NGOs).

In South Africa, research related to understanding and supporting creative industries is very important since such industries are considered an economic strategy to grow wealth and employment in the country. Unfortunately, current mapping documents on creative industries still lack several key industries, such as the video gaming industry. The video gaming industry is a core industry of many popular creative industry models, including the DCMS model, Symbolic Texts Model, WIPO Copyright Model, UIS Trade-Related Model, John Howkins Model and UNCTAD Model. Therefore, more local research is required to identify the relevance of supporting such industries in South Africa to which this chapter made a contribution by identifying the size, scope and importance of creative industries.

Research on creative industries such as the video gaming industry can be gathered at events associated with these industries. Exhibitions and related planned events provide good opportunities for collecting market information as they function as a meeting point of target market representatives. Accordingly, the following chapter examines exhibition management and events, including a literature analysis on demand- and supply-side research, research important in aiding market efficiency and integral to planning and growing industries and events.

Chapter 3: A literature analysis of exhibition management and events

3.1. Introduction

Events are essential motivators for tourism and can play a prominent role in the development and marketing of a destination (Getz, 2008:403). The growth of this sector and its role within tourism can be described as spectacular, seeing that 'event tourism' was only established a few decades ago in both the research community and tourism industry (Getz, 2008:403). Besides being one of the most important aspects of tourism, events also form an inseparable part of human society (Oklobdžija, 2015:83). As for event tourism, this phrase encompasses all that is festivals and events and is understood to be the nexus of tourism and event studies (Getz, 2008:406). At the core of event tourism and events in general lies event management, which describes 'the way in which an organisation deals with events' (Bhe, Glasmacher, Meckwood, Pereira & Wallace, 2004:4). Event management is a fast-growing professional field in which tourists constitute potential markets for planned events, and the tourism industry plays a vital role in its success and attractiveness (Getz, 2008:403).

Taking the shape of public display, civic ritual, and collective celebration, early events (dating back millenniums) was held in celebration of local culture, tradition, victories, customs and heritage and provided a space for communal creativity (Quinn, 2009:486). Exhibitions and trade events were among the earliest forms of events as a means to auction produce and livestock, dating back to the ancient Roman, Greek, and Egyptian times (Oklobdžija, 2015:83). Exhibitions are of particular importance to this study seeing that this study focusses on the rAge Exhibition held in Johannesburg South Africa. Coming back to the history of events, including exhibitions, many new and different practices over time changed the landscape of how events were perceived and in turn rallied many debates concerning its definition (Quinn, 2009:483). This only became more interesting with the introduction of tourism research and its defining role in events (Quinn, 2009:483). Fortunately, for this day and age, many great strides have been taken to define the nature and extent of tourism-related festival and event research (Quinn, 2009:484). The ability to understand the role and the relationship between the tourism industry and events is progressive towards developing a destination's attractiveness and economic growth (Getz & Page, 2016:593).

Therefore, the purpose of this chapter is to analyse event research and the role of exhibitions/expositions at a destination. In doing so, the chapter is divided into two main sections. The first part of this chapter focuses on providing background on event

management within a tourism context, the role-players in event management, the benefits of hosting events, the classification of events as well as the findings on event-related research. In line with the aim of the study as well as its focus, the second part of this chapter is more refined to exhibition events and focuses on exhibition management, classification of exhibitions, benefits of hosting exhibitions, exposition management in a South African context (relevance and importance) and related research. This chapter thus serves as a gateway to understanding why exhibitions are important for tourism development and how they contribute to tourism and related industry growth. The information provided in this chapter also serve as a guideline for event management for things to be considered when planning, starting and/or hosting successful exhibitions, including video gaming exhibitions.

3.2. A critical overview of event management

Behind all events are people that work tirelessly to create the best experience for guests, spectators, artists/stars, sponsors and stakeholders (Event Business Academy, 2016:internet). These people are the event managers, planners, coordinators, designers, and organisers responsible for managing the event experience (Getz & Page, 216:596; Thomas, Hermes & Loos, 2008:20-21; Todd, Leask & Ensor 2017:496). They also represent event management and because event management is central to the manner in which events are held and organised (Getz & Page, 216:596), it is important to understand its role in the event and tourism landscape. Therefore, the following section provides a review of event management, including its role in tourism, related careers, related stakeholders and previous research done on the topic.

3.2.1. Event management

Management refers to a process of utilising available material and human resources to accomplish designated objectives and goals (Okoli, 2012:28). It involves all activities from planning, organising, directing, and coordinating to controlling event outcomes (Okoli, 2012:28). Concerning event management, this includes the planning, organising, directing, coordinating, and running of all the features, logistics, people and teams that come together to create every kind of event (Event Business Academy, 2016:internet). It is a process in which both business management and organisational skills are utilised to envision, plan and execute social and business events (Hard, 2016a:internet). Activities included in this process are budgeting, venue selection, scheduling, logistics, marketing, human relations and working with vendors, stakeholders and government officials and public facilities (Hard, 2016a:internet). By definition, event management refers to ‘the making of an event or the way in which an organisation handles events’ (Okoli, 2012:28). Okoli (2012:28) has compiled

this definition of event management through a variety of literature in the field of event management (see Getz, 1991; Goldblatt, 2002; Okoli 2007; Seekings, 1996).

3.2.2. Event management within a tourism context

Event management, seen from a tourism perspective, is concerned with the production and marketing of events as motivators to grow tourism (Todd *et al*., 2017:494). Tourism-driven event management includes most if not all of the activities found in traditional event management, but with the primary focus on creating destination value and attractiveness (Todd *et al*., 2017:494). This is because event tourism can be used as an important strategy to achieve social, economic, and environmental goals while also providing societies and destinations benefits (Çelik & Çetinkaya, 2013:1). Çelik and Çetinkaya (2013:1) explain that event tourism plays a prominent role in facilitating cultural exchange among the people of the world and contributes to a city's development and brand. It is thus the responsibility of tourism event managers, planners and producers to plan, coordinate and market events towards obtaining social, economic and environmental value while also focusing on improving the image of a destination (Getz & Page, 2016:594). This includes the task of creating unique selling points that distinguish destinations from their competitors (Getz & Page, 2016:594). Therefore, tourism event management can be defined as management that purposefully uses an event's capabilities, through destination-based resources (cultural, natural, historical, artificial) and management skills (planning, coordinating, designing, directing) to foster tourism development in a host destination (Getz, 1997:16; Getz & Page, 2016:594; Hernández-Mogollón, Folgado-Fernández & Duarte, 2014:86; Todd *et al*., 2017:494). This then raises the question as to what roles need to be fulfilled to possess the necessary management skills for hosting tourism-related events? To answer this question, the following section describes the various careers within event management.

3.2.3. Careers in event management

Event management is an applied and professional field devoted to understanding and improving the management of planned events (Getz & Page, 2016:595). There are several different career paths or roles one can pursue in event management. Those more specific to tourism can include but are not limited to, the event facilitator/coordinator, event tourism planner, event tourism analyst, researcher, event bidder and event service providers (Getz & Page, 2016:598). All these (and yet more) are roles that comprise the event management team (Gascoyne Development Commission, 2015:6). An event management team aims at having available a wide range of expertise, interests, skills and experience to share the work and to work towards a common goal or outcome (Gascoyne Development Commission, 2015:6). Each person or segment of the event management team has a formal statement of

roles and responsibilities and forms part of the decision-making process necessary to host successful events (Gascoyne Development Commission, 2015:6). In an uncommon situation, a single person can fulfil all event management tasks but this happens very rarely (Tasmanian Government, s.a.:1). Traditionally there would be an appointed event manager who has primary control of the event's direction and who is ultimately responsible for making major decisions (Tasmanian Government, s.a.:1). Since event management usually takes the shape of an organising committee with allocating responsibilities, the event manager will serve as the head of the committee while the other members will serve as managing representatives of their specific field and/or expertise in hosting and organising events (Getz & Page, 2016:595; Tasmanian Government, s.a.:1). Organising committees or event management organisations thrive or perform well when there is a professional business structure and clear operating procedures amongst its members, coupled with self-efficacy and creativity (Hallak, McCabe, Brown & Assaker, 2016:260).

One should also bear in mind that size or even necessity of an organising committee is mainly dependent on the scope and size of the event (Connelly Project Resources Group [CPR] Group, 2011:10). A larger event may require a more extensive committee as it provides better workload sharing and a wider range of ideas (CPR Group, 2011:10). Therefore, the tasks or load of responsibility may differ for members, depending on the size of the committee or managing team and the type of event. However, there is consensus on what these tasks necessitate for different members or segments of the managing team and is represented as career paths in event management. Table 3.1 provides an overview of some of the most common career paths in event management seen from an event tourism perspective. The table also outlines some of the main tasks/areas of expertise that come with each job title.

Table 3.1: Career paths in event management: An event tourism perspective

Event types	Sample job titles	Tasks/areas of expertise
Festivals and special events	Producer	• Overall responsibility for the festival/event • Create and produce events to create tourism value • Management of stakeholders/partners
	Manager	• General management responsibilities • Plans and executes event
	Coordinator	• Assists in realising the tourism potential events at the destination • Provides advice on/coordinates marketing and funding • Acts as Liaison with festival/event venues

	Event bidding	• Bids on events • Conducts risk assessments and feasibility studies when bidding for events
	Designer	• Manages artistic elements • Manages design and decor
Meetings and conventions	Planner	• Develops destination/meeting/convention strategies • Integrates event with product development and branding • Focuses on logistics
	Event coordinator	• Liaises with conference venues • Coordinates the flow of tasks at a convention or exhibition facility
Exhibitions	Exhibition producer	• Overall responsible for the exhibition • Manages stakeholders (sponsors, exhibitors, retailers, venue management)
	Exhibition designer	• Plans arranges and designs the layout of exhibitions
Sport events	Sports event manager	• Manages plans and executes sporting events
	Sport Coordinator	• Coordinates funding, marketing, and sporting programmes • Facilitates communication of sporting issues between sponsors, participants, spectators, and management
Corporate events/ business events	Public relations manager	• Manages the event reputation • Gains understanding and support of potential stakeholders and clients, and ways of influencing behaviours and opinions • Communicates with media
	Events producer	• Stakeholder management (corporate partners) • Manages and implements business events and multifaceted projects on behalf of the company and its clients
Fairs	Fair manager/producer	• General management responsibilities • Plans and executes fairs • Overall responsibility for the fair • Manages stakeholders (stalls, exhibitors, and entertainment providers) and satisfies stakeholder needs • Mapping stakeholder roles
Venues	Facility manager	• Manages facility assets • Manages activities or duties related to the operations of the venue • Activities include managing scheduling, bookings, client relations, venue security, financial management, client relations, marketing, and promotions
	Events coordinator	• Deal with venue logistics • Act as liaison between clients and the venue's operations team • Help coordinate services on-site

Source: Adapted from Every Last Detail (2015), Getz (2012:17-20), Getz and Page (2016:596), Oyster Festival (2013:1-2), Todd *et al.* (2017:496), Thomas *et al.* (2008:20-21), and Uniplan (2016:1)

As evident from Table 3.1, different career paths are linked to different types of events. This also applies to the stakeholders within event management. Stakeholders such as event managers and the event management team can be directly responsible for the planning, organising and hosting of events, but so too can other event stakeholders, not to mention those that can play supporting roles. The following section discusses the various stakeholders in event management.

3.2.4. Stakeholders in event management

All events involve a set of interdependent and interacting elements and actors within a system (Tassiopoulos, 2005a:37). Among these actors are for example sponsors, attendees and participants/athletes/exhibitors/performers (Tassiopoulos, 2005a:37). Events are dependent on these actors because they contribute critical resources (Presenza & Iocca, 2012:26). If there is a lack of resources, it 'can be explained by a weakness of the management to attract sponsors and donators' (Presenza & Iocca, 2012:26). Hence events and festivals rely on the support of stakeholders and their resources for their survival (Andersson & Getz, 2008:202; Presenza & Iocca, 2012:26). Stakeholders can be defined as 'any group or individual who can affect or is affected by the achievement of the firm's objectives' (Freeman, 1984:25). In events, stakeholders can represent any organisation or individual that has an interest in the event, has needs or expectations surrounding its activities, provides valuable input or resources, who may affect the outcome of activities and who may have a direct impact and/or influence on the planning, production and implementation or participating phases (Getz, 1991:15; Jones, 2009:internet). In short, an event stakeholder can be defined as those who can influence the event/event organisation, or are influenced by it (Getz, 2007:92; Presenza & Iocca, 2012:26). This means that event stakeholders have the ability to threaten or support an event or collaborate with it (Andersson & Getz, 2008:201).

Because stakeholders may have conflicting interests or outcomes for an event, event management is tasked to balance-out these needs (Reid & Arcodia, 2002:20). Event management should also be responsive to the needs of its suppliers, customers and the community, as it can lead to the long-term success of an event (Reid & Arcodia, 2002:20). The reason being that no event takes place in isolation and that each event system involves the event itself, the participants/audience/consumers, and sponsors as interacting and inter-dependent variables vital to its success (Schaaf, 1995:46; Tassiopoulos, 2005a:37). This is similar to Ammon, Southall and Nagel's (2010:94) statement in that 'each side represents important stakeholders who must be satisfied for the event to be a success'. The use of

administrative support, planning, and marketing is but a single example of a financial link that exists between these variables (Tassiopoulos, 2005a:37).

The exchange (give and take) that happens between the event, its audience and sponsors forms the binding force of the event triangle model (see Figure 3.1) (Kaser & Oelkers, 2015:262). The event triangle model is a proven and popular model used to study exchanges in events (see Kaser & Oelkers, 2015:262; Richter, 2018:internet). The model is also used as a marketing model in the context of events (Richter, 2017:internet). Because of this the role-players identified by this model will be examined in this study. It does not go without saying that other stakeholders might also play a direct or indirect role in events such as the physical or natural environment (weather, climate and terrain) and the venue.

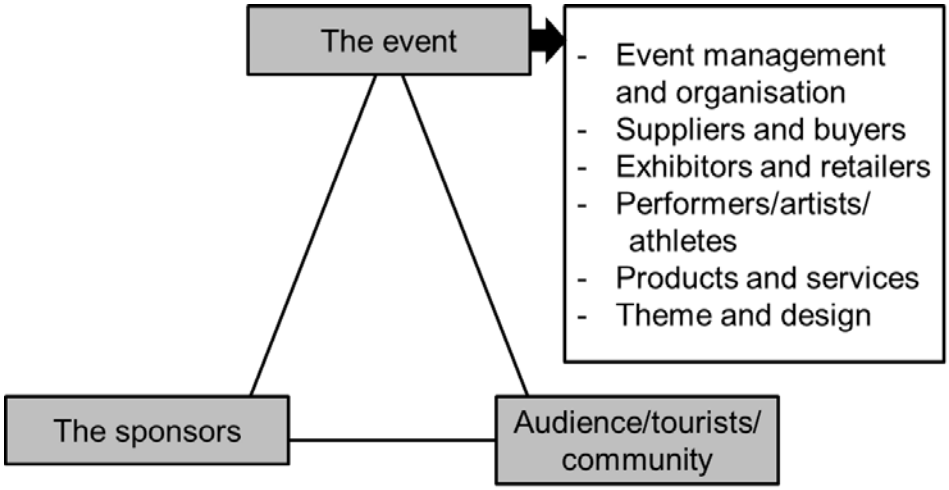

Figure 3.1: Key event role-players
Source: Adapted from Schaaf (1995:53) and Tassiopoulos (2005a:38)

As mentioned, event management requires the aid of sponsors as they can provide resources such as financial support and that of publicity (Schaaf, 1995:53). Sponsors can also provide event companies with various promotional packages, ranging from all forms of media advertising and licensing rights to event promotions featuring giveaways, sampling, billboards, VIP reception and merchandise (Tassiopoulos, 2005a:38). Sponsors make use of events to gain promotional exposure and afford them the opportunity of reaching target markets (Tassiopoulos, 2010:68). Similar to sponsors, event performers may take advantage of events to gain or increase fans/reputation from events while also wanting compensation for their time and talent (Tassiopoulos, 2010:68).

Without attendees, none of the above-mentioned stakeholders will truly benefit since audiences or tourists have a financial and physical presence at the event, not to mention an

electronic presence on the radio or television (Schaaf, 1995:49). Their numbers, spending behaviours and experience play a valuable role in the success of an event, whereas a 'successful' event is communicated through its sponsors as well as its attendees (Schaaf, 1995:50; Tassiopoulos, 2010:68). This only further accentuates the importance of event management in maintaining the support and investment of its visitors and sponsors.

Besides maintaining the support of mentioned stakeholders, event managers also have the responsibility of creating outcomes that hold social and economic benefits (Tassiopoulos, 2010:68). This introduces two very important role-players into the equation, namely the community and the government. Gaining the support of the community can have an invaluable impact on the tourist's perception of the event destination (Oklobdžija, 2015:94). Ignoring a community's involvement in events or their tradition, however, may cause them to react unfriendly towards tourists and even discourage future attendance. Some communities may even go as far as boycotting the event altogether (Oklobdžija, 2015:94). When community members are actively involved in events and significance is placed on traditions and regional values, socio-cultural benefits can be derived from events (Oklobdžija, 2015:94). This includes benefits such as the employment of local entrepreneurs and artists at the event, increased traditional awareness and money that flows back into the community in growing the local economy (Oklobdžija, 2015:94).

Regarding the government, growing the local economy and promoting social and traditional wellbeing (social responsibility) is an essential responsibility (Austrian Federal Ministry of Agriculture, Forestry, Environment and Water Management [BMLFUW], 2007:4; Legatum Institute, 2015:internet). Governments may also play the role of a sponsor as they can fund events or specific aspects of events (Pugh & Wood, 2004:62; Tassiopoulos, 2010:69). In this regard, the government sees the events as place promotion to create a symbolic image of a destination as a representative of the area and then communicate that image to a target audience to attract and maintain visitors (Pugh & Wood, 2004:64). Getz (1997:51) explains that 'place marketing provides a framework within which events and event tourism find multiple roles, as image makers, quality of life enhancers and tourist attractions'. In addition, local authorities are fundamental to the provision of leisure and tourism facilities, including the service and supply of basic infrastructure (Pugh & Wood, 2004:63). Local authorities may also seek events as an alternative in response to cultural and leisure needs (Pugh & Wood, 2004:63). Other benefits introduced by government-supported events include fostering sport, health, art and social integration (Tassiopoulos, 2010:69). Governments aimed at supporting events for economic reasons may wish to stage events to create employment, entrepreneurship and to bring a healthy flow of income into a destination

(Tassiopoulos, 2010:69). What is more, governments may not only wish to sponsor events but also buy into events. A buyer of events takes the role of organiser and planner and is one who buys or hires venues and other related services in staging events (Tassiopoulos, 2005a:41). Event buyers, as well as event suppliers, refer to those role-players that have an intimate part to play in researching and producing the events (Tassiopoulos, 2005a:41). The next section elaborates further on these role-players.

3.2.5. Buyers and suppliers of events

Traditionally, there are two types of buyers in the meetings industry that buy into events, namely the corporate buyer and association buyer (Rogers, 1998:25). The government however was later included, a third type, namely event buyer (Tassiopoulos, 2005a:41). Government buyers are considered non-profit buyers who are accountable for the spending of public funding in promoting economic and social benefits through events (Pugh & Wood, 2004:64). Corporate buyers on the other hand have the primary purpose of generating income and providing a company with financial return (Rogers, 1998:25). The corporate buyer represents the businesses market and includes manufacturing and service organisations found in all sectors of the industry (Shock & Stefanelli, 1992:27). This also means that many different types and sizes of corporate events exist and can be listed as follows (Rogers, 1998:25; Hard, 2016b:internet):

- Board meetings, annual general meetings, shareholder meetings
- Exhibitions
- Incentive travel events
- Seminars and conferences (technical and sales conferences)
- Trade shows
- Product launch events
- Executive retreats and incentive programmes
- Appreciation events
- Team-building events
- Training courses

Contrary to corporate buyers, the association buyers are considered non-lucrative buyers and do not aim to obtain high return investment (Carter, O'Byrne & O'Connor, 2014:60). Association buyers are involved in events of a charitable or political nature (Carter *et al*., 2014:60). Shock and Stefanelli (1992:31) refer to association buyers as the SMERF market. The SMERF market is an acronym for social, military, education, religion and fraternal markets. The SMERF market represents a wide range of organisations including voluntary

societies and associations; trade unions; religious organisations; charities; civic groups; political parties and professional and trade associations (Tassiopoulos, 2010:72).

Whether being an association, corporate or government buyer, all three types of buyers may employ the services of various agencies to assist in staging their events (Tassiopoulos, 2010:70). One such service may include hiring venues and facilities and thus making use of event suppliers. An event supplier is any party/person/association or businesses that make the external hire of destinations, venues and specialist services possible/available (Tassiopoulos, 2010:74). Event suppliers are critical to the success of events, taking many forms such as the supply of staff, registration, audio-visual, photography, decor, catering, event venues, parking, furniture, gifts, incentives and even event insurance (Aston Events & Communication, 2017:internet). Venues may perhaps be the most visible supply-side element of meetings, incentives, conferences, and events (exhibitions), also known as MICE (Dimanche & Andrades, 2015:325). Venues include all facilities providing a space or room available for hosting meetings, incentives, conferences and exhibition (MICE) events (Dimanche & Andrades, 2015:325). Therefore, venues can account for accommodation areas (hotels, motels or resorts), convention and exhibition centres, show grounds, race tracks, conference centres, sports grounds and race tracks, restaurants, universities, community halls, club facilities, cruise ships to specific tourist attractions (national parks, museums or monuments) (Deery, Jago, Fredline & Dwyer, 2005:4-5). In addition, some hotels may also benefit as providers of accommodation when they are in proximity of event venues (Tassiopoulos, 2010:70). Authorities, on the other hand, may strategically host events to kick-start venue development as a peripheral to the events economy of a country (Tassiopoulos, 2010:70).

Seeing that different role-players have different agendas and parts to play in creating the event experience, sustained support in them; therefore, it is necessary as it nurtures successful events (Todd *et al*., 2017:495). A successful event also relies on the event manager's capability to understand the relationships stakeholders have with one another and their overall impact on the outcomes (Todd *et al*., 2017:495). Having said this, consolidating previous research on event management can provide a better understanding of critical themes related to hosting successfully planned events, including the identification of critical success factors from a demand side and supply side.

3.2.6. Previous research regarding event management

The size of events and festivals has greatly increased over recent decades (Jones, 2012:107). Sustainable growth can be witnessed by today's commercial scale of events and

festivals while fuelled by all the media attention (Jones, 2012:107). With the increase in market demand over recent years, came the increase of academic research interest in event management (Getz, 2012b:172; Park & Park, 2016:109). This resulted in many new and diverse topics to emerge in event studies (Park & Park, 2016:109). Review studies in the field of event studies by Getz (2012a, 2012b) as well as Getz and Page (2016) depict this expanding field of event management and the wider social science contribution to this interdisciplinary area. According to their reviews, currently several international journals exist in English that cover the field of event management including *Event Management, Journal of Convention and Event Tourism, International Journal of Event and Festival Management, and International Journal of Event Management Research.*

Despite the journals mentioned above, not to mention the increasing numbers of publications and newly emerged journals, only a handful of review articles have evaluated event- and convention-related research (Park & Park, 2016:110). In 2005, Yoo and Weber (2005:198) assessed research trends on convention tourism. They examined 115 journal articles published in 14 hospitality and tourism journals from 1983 to 2003 (Yoo & Weber, 2005:196). The most reoccurring topic on convention tourism research thought-out this period across all journals was marketing, ranging from 33% in journals such as the *International Journal of Hospitality Management* (IJHM) to 100% in the *Annals of Tourism Research* (ATR) and the International Journal of Contemporary Hospitality Management (IJCHM) (Yoo & Weber, 2005:196). Using content analysis, Lee and Black (2005:1) revealed other relevant research topics for meeting and convention tourism during a similar period, such as associations' site selection processes, destination marketing, and the economic impact of convention activities. They assessed a total of 137 published convention articles in major hospitality and tourism journals from 1990 to 2003 (Lee & Black, 2005:1). In 2012, Mair (2012:137-140) identified meeting planners, meeting suppliers, attendees, destination, industry general, research reviews, and types of meetings to be popular topics for business event research among ten different journals. Mair (2012:137) also identified several popular subthemes during her review of 144 articles published on business events, including evaluation of satisfaction, services/destinations, technology, law and government, attendee decision-making process/factors, site selection process, trends and issues and the future of the industry and destination marketing. A summary of the themes identified in review studies on event management mentioned above can be seen in Table 3.2.

Table 3.2: Themes in previous event management reviews

Authors	Themes
Lee and Back (2005)	• Destination marketing and convention visitors' • Bureau (CVB) operations • Sales and operations (hotel meetings) • Convention centres (development, operations and other meeting venues) • Meeting planning (budgeting, scheduling, planners' role) • Site-selection process (attributes, factors, and criteria) • Planners' evaluation of meeting services and destinations • Meeting participation process (factors) • Trends, issues and the future of industry (forecasting) • International meeting market • Economic and socio-economic impact • Technology (advances made) • Education (college curriculum) • Law, labour and government
Yoo and Weber (2005)	• Administration/strategy (strategic planning, accounting, crisis management, communication and policy analysis) • operations (inventory management and purchasing, facility management, safety and security and quality control) • Marketing (consumer behaviours, loyalty, satisfaction and decision-making, marketing mix and market research) • Human resources (employee selection, training and satisfaction, employee benefits, labour diversity and labour costs) • Research and development (technology, information gathering and analysis and innovation) • Finance (finance management, profitability, cash flow and financial statements) • Economy (economic impact and forecasting)
Getz (2010)	• Experiences and meanings (political and social/cultural meanings and discourse, authenticity, community culture and destination identity, social cohesion and sociability, religion (rites and rituals), pilgrimages, spectacle, myths and symbols) • Antecedents (motivations and constraints) • Outcomes and the impacted (economic impacts, social and cultural impacts, place, image and marketing, personal impacts, environmental impacts, urban development, and renewal) • Planning and managing events (marketing, planning, evaluation, stakeholders, safety and security, economics and financing, human resources, sponsorships, ownership, attendance, programming, entrepreneurship (cultural), food and drink, and organising and coordinating) • Festival experience design themes (setting, programming, theme, and creativity (performances), service provision and quality, and consumables) • Patterns and processes (policy, temporal processes, knowledge creation and spatial patterns and processes)
Mair (2012)	Primary themes or focus • Attendee • Destination • Meeting planner

	• Meeting supplier • Industry general • Research reviews Sub-themes • Attendee decision-making process • Destination image • Destination/CVB marketing • Economic impact • Convention centre development • Evaluation of satisfaction/service quality/destination • Operations (hotel/meetings/sales) • Meeting planning (budgets and schedules) • Other areas including law, government, and policy) • Destination planning (other meeting venues and site selection) • Advances in technology • Trends and Issues
Getz (2012b)	• Anthropology (Cultural) • Management (Population ecology, supply and demand, economics, stakeholder and institutional) • Ecology and environment • Geography (humans, history and future studies)) • Philosophy (ethics and aesthetics) • Political Science and Law (ideology policy and law) • Psychology (event experience) • Sociology (social values, structures, and network; identity)
Kim, Boo and Kim (2013)	• Administration/strategy (Strategic planning) • Research/development • Finance (budgeting and financial management) • Control/operation (quality control and safety and security) • Marketing (consumer behaviours) • HR (Employee training, labour costs, volunteering) • Other, such as law and government
Getz and Page (2016)	• Event tourism experiences and meanings (political and social/cultural meanings and discourse) • Antecedents of event tourism (Motivations and constraints) • Planning and managing event tourism (Marketing, planning, evaluation, stakeholders, safety and security, and financial planning) • Dynamic processes (spatial, temporal, policy, knowledge) in event tourism • Economic effects of events (Economic impacts) • Social and cultural impacts of event tourism • Environmental outcomes of event tourism

Source: Researcher's own compilation

More recent research concerning a thematic review of event management can be found in work done by Park and Park (2017). Park and Park (2017:851) collected and assessed 592

research papers published from 1998 to 2013 in four event-focused journals: *Journal of Convention and Event Tourism, Event Management, International Journal of Event and Festival Management* and *International Journal of Event Management Research*. Also, another 106 research papers were reviewed on the topic of event management research in tourism and hospitality journals, including the *IJCHM, IJHM, Journal of Hospitality and Tourism Research, Journal of Travel Research* and *Tourism Management*. Park and Park's (2017:856) assessment found marketing, destination and management to be the most popular/commonly researched themes in event management, followed by six lesser researched themes including human resources (HR), evaluation, planning, education, trends, and technology. Based on a review of selected review papers (see Getz, 2010; Getz & Page, 2016; Kim *et al*., 2013; Lee & Back, 2005; Mair, 2012; Yoo & Weber, 2005) and on their finding, Park and Park (2017:853) developed a nine-theme model for coding event research (see Figure 3.2). The model identifies the general patterns and topics in event management research and codes them into themes summarising research trends (Park & Park, 2017:853).

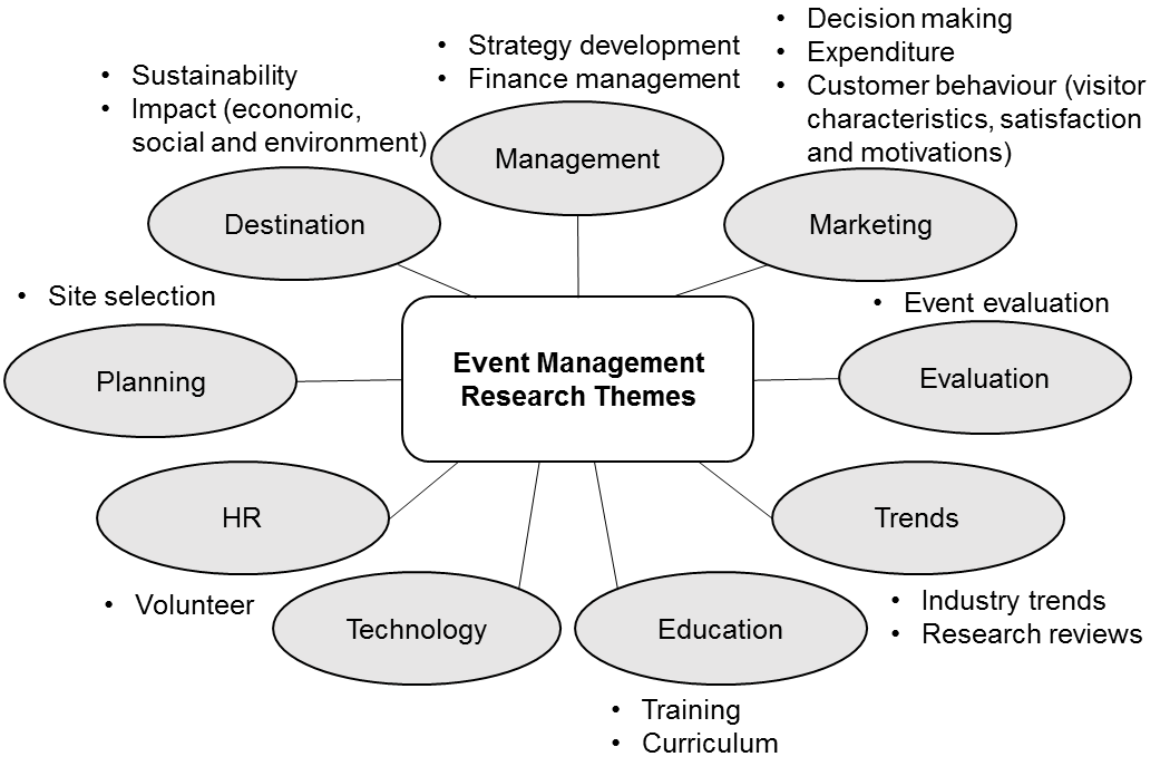

Figure 3.2: Themes for coding event management research

Source: Adapted from Park and Park (2017:853)

One of the research gaps that seems to be evident in event management review studies (see Getz, 2010; Getz & Page, 2016; Kim *et al*., 2013; Lee & Back, 2005; Mair, 2012; Park & Park, 2017; Yoo & Weber, 2005) has bearing on the little amount of research that has

focussed on the decision-making process and behaviours of event attendees. An example of this can be seen in Mair's (2012:137) review of event management research done between 2000 and 2009, revealing only 15 articles on these topics. What is more, Mair (2012:137) herself noted this as an under-researched area within the field of business events, and as such, is unfortunate, since visitor research is essential for conducting marketing and demand-side research. Getz (2012b:183), Kim *et al*. (2013:81) and Mair and Whitford (2013:27-28) also sees decision-making and event evaluation as important areas of research for event management, at the same time, Yoo, Lee and Bai (2011:529) stress the need for more research on customer/visitor behaviour. Understanding the behaviours and motives of visitors can aid in the demand-side management process of successfully modifying planning procedures and operations towards specific goals (Billinton & Lakhanpal, 1996:225). It is considered also that 'both supply- and demand-side options are integral elements in system planning and operation' (Billinton & Lakhanpal, 1996:225). Demand- and supply-side research can aid market efficiency by filling the gaps between demand and supply objectives (De Silva, 2010:5). Manners, Kruger and Saayman (2016:148) state that demand- and supply-side research within planned events are important for identifying critical success aspects that help to manage memorable visitor experiences.

Unfortunately, planned event research concerning both visitor behaviour (demand side) and that of the hosting organisation (supply-side) is very scarce in South Africa. Only a few South African studies have applied this approach, including those done by Manners, Kruger *et al.* (2015, 2016), Manners, Saayman & Kruger (2015), De Witt (2006) and Kruger (2006), even though many more can be found internationally. For purposes of this chapter and this study, focus will be centred on local and recently done international studies on demand-side and supply-side aspects of planned events. This will provide a better perspective on current and local research trends in these fields. To start off, Table 3.3 provides an overview of some of the more recent national and international event studies done from a demand side, including the respective aspects covered.

Table 3.3: Previous event studies from the demand side

Authors	Study title	Identified demand-side aspects
Manners, Kruger *et al.* (2015)	Different venues, different markets, different experiences: evidence from live music performances in South Africa	Important motivational aspects for attending • Artist affiliation & unique experience (because it is once-in-a-lifetime experience, to see well-known artists, to have a unique experience, and to see artists live) • Entertainment (to enjoy music, enjoy these types of events and these concerts are entertainment at its best) • Excitement and group affiliation (experience new things, to have fun, enjoy event with others, exciting things to do, share experience with someone special) Critical management aspects for a memorable experience • General management (clean, hygienic and adequate ablution facilities, traffic control, security and safety, friendly, professional and trained staff, and correct information on tickets) • Venue and technical aspects (good aquatics and stage visibility, good layout and accessibility, and effective technical aspects) • Marketing (assessable and user-friendly website, adequate and correct information before event, and effective ticket sale before event)
Egresi and Kara (2014)	Motives of tourists attending small-scale events: The case of three local festivals and events in Istanbul, Turkey	Reasons for attending the film festival • Like watching movies • Enjoy the atmosphere of the festival • Interested in cultural differences in productions • Productions are of high quality • Reasonable ticket prices • The festival is famous Reasons for attending two musical events • Enjoy the atmosphere • Interested in cultural differences in productions • The festival is famous • Productions are of high quality • To see my favourite artists
Jani and Philemon (2016)	Comparison of local and international festival attendees' motives and perceptions of festival impacts: Case of Sautiza Busara	Motives for attending Sauti za Busara Festival (Music festival) • International tourists o To experience the Swahili culture o Socialisation o Entertainment • Local tourists o To learn about music o Socialisation o To escape o To see special musicians

Gunlu and Lale (2015)	The comparison of the demographic characteristics of the participants regarding participation motives regarding different events	Reasons for attending the International Izmir Film Festival • Because I like films • To see different things and do different things • Because I like special events • Because of curiously • Because festivals are exciting Reasons for attending the International Bayındır Flower Festival • Because I like flowers • Love to see and do different things • Because I like special events • To participate in and gain new experiences from different/new things • Because festivals are exciting Reasons for attending the İzmir Boyoz Festival (food festival) • Love to see and do different things • Participate in company with friends • Because I like special events • Participate to see entertainment • Participate in going with entertaining people
Scholtz, Kruger and Saayman (2015)	A motivation-based typology of five-day international test cricket match spectators	Factors for a memorable experience • Parking (adequate security and parking arrangements) • Match qualities (engaging, entertaining, competitive and action-packed match, to see star athletes, quality performances, and drama of a close game) • Visibility, comfort, and accessibility (seat accessibility and comfortability and field visibility) • General management and adorability (trained personnel, visibility of personnel, adequate safety precautions, enough rubbish bins, effective and reliable marketing prior to event, and avoidable food, beverages, and tickets) • Food and beverages (variety of food and beverages)

Source: Author's own compilation

Studies on events done from a supply side can be seen summarised in Table 3.4. These studies represent but a handful of studies done over the past two decades covering critical success factors from a supply side.

Table 3.4: Previous event studies from a supply side

Authors	Study title	Identified critical success factors
Lade and Jackson (2004)	Key success factors in regional festivals: Some Australian experiences.	Festival A (Jazz festival): • Annual creative and unique programme development • Appropriately respond to feedback from results of annual research conducted at the event. Festival B (sporting theme event): • Develop a single sporting event before the festival's evolution as basis to further foster a sporting festival • Good quality and conditions of sporting facilities within and around the regional centre. • Event planning • Managing of activities • Community participation • Marketing strategies
De Witt (2006)	Key success factors for managing special events: The case of wedding tourism.	• Strategic management (setting business ethics and assessing management strategies) • SWOT analysis (internal and external environment) • Financial management (budgeting) • Market segmentation • Promotion • Operation management • Human resource management
Kruger (2006)	Critical success factors in managing a conference centre in South Africa.	• Proper operational aspects • Human resource management • Proper conference planning • An attractive venue • Good marketing management • Functional layout and appropriate variety of facilities
Manners, Saayman *et al.* (2015)	Managing a live music performance: A supply-side analysis	Aspects of a memorable experience • Good artist performance (memorable performances by artists) • Personal interactions (between artist and attendee) • Good food and drink variety • Enough abolition facilities • Well-trained staff Purpose of organising live performances • Making profit Important management aspect • Artist • Audience • Marketing and media • Technical aspects

		Timing of event management • Pre-event planning (location, venue, dates, the artist, laws and bylaws, ticket availability, staffing, and safety and security) • During event planning (implementation and execution of plans – artist management, staff management, logistics and technical security, ushers guiding visitors, coordinating with security services, police and safety and health officials) • Post-event planning (debriefing and recommendations, clean-up, traffic control, handling complaints, and ensuring payments are made)

Source: Researcher's own compilation

A comparison of the two tables reveals that keeping with the theme of an event is important both for organisers (supply side) and visitors (demand side). In other words, it is important for organisers to acquire appropriate artists or exhibitors since they are some of the main reasons why visitors attend. The venue and its operations is another aspect that contributes to the theme of an event since it provides visitors with appropriate facilities, services and accessibility to, from and within the event, including adequate parking space. Marketing is also revealed as being essential for both parties since visitors want to be informed on what to expect at the event, while organisers want to provide adequate and correct information to promote effective ticket sales. However, where discrepancies might be seen between the two is in pricing, seeing that many organisers primarily want to make a profit while visitors seek reasonable ticket prices (Manners *et al.,* 2016:156). Hence it is crucial for organiser and visitor interests to be taken into consideration during the planning phase as it is one of the most critical success factors for hosting planned events (Wanklin, 2005:119). With planned events playing a crucial part in a destination's competitiveness, development and attractiveness (Getz & Page, 2016:593; Oklobdžija, 2015:92), and in event tourism growth in general (Getz, 2008:403), it is important to understand the intertwining role they play leading to these benefits. A discussion of planned events in event tourism will thus follow in the following section.

3.3. Planned events in event tourism

Event tourism is an applied field devoted to understanding, improving and growing tourism through events (Getz & Page, 2016:595). Event management operating within the tourism industry bears the responsibility of understanding and improving tourism through events (Getz & Page, 2016:595). Planned events in tourism are particularly important for a host destination since they are created with a purpose and can provide value and positive attitudes towards a host destination (Gration, Raciti, Getz & Andersson, 2016:607; Small, 2007:54). The opposite can be true for unplanned tourism events, since it can cause

indiscriminate and unplanned tourism growth, potentially resulting in adverse effects such as social and environmental degradation (Batta, 2000:59). Therefore, planned events are increasingly moving away from individual and community initiatives to a realm of professionals and professionalism, signifying the need for and importance of event management (Getz & Page, 2016:594),

Event tourism and event management are both themes that are outlined in event studies. An event study is the study of planned events (Patterson & Getz, 2008:228). This is an interdisciplinary field that studies all planned events, the meaning attached to events and their experiences (Getz & Page, 2016:595). The central idea behind these studies lies in the conceptualisation of a planned event experience whereby meaning is attached to the type of event and its experiences (Patterson & Getz, 2008:228). Unlike tourism studies which have been performed over a longer time frame, event studies are quite scarce and scattered (Friebe, 2015:4). In fact, the term was first used in the year 2000 as opposed to tourism studies which received growing research attention from the 1970s (Echtner & Jamal, 1997 as cited by Friebe, 2015:4). Because of its more recent academic attention, the field of event studies is still presented with the problem of underlying a theoretical structure and its future advancement as a field of research (Friebe, 2015:4). Fortunately, event management is increasingly being deliberated as a distinct field of research (Thomas & Thomas, 2013:8; Ziakas, 2010:159). By investigating the underlying theories and structures in event management, one can aid in assessing the status of event studies (Friebe, 2015:4). It is also plausible to identify and compare similarities or differences between event studies and tourism studies by structuring event management knowledge (Friebe, 2015:5).

To create a framework for understanding and creating knowledge with regard to planned events one should first understand the elements involved. Getz (2007:10) identified four elements for studying knowledge on planned events in event tourism. The elements are subsequently identified as (Getz, 2007:10; 2010:1, 2012b:11-12; Patterson & Getz, 2008:228):

- Demand side (antecedents and decision-making)

This represents factors that shape the decision-making process for attendance and includes the individual or collective needs, demands and motives of event attendees.

- Supply side (planning, design, and management)

Planning and managing tourism events is largely the domain of event management, where the focus is on mobilising resources, transforming processes and management systems, setting goals and strategy formulation and professionalism.

- Patterns and processes

Patterns and processes represent the broader environmental influences and dynamic aspects within the event studies system such as temporal processes (series of events leading to a specific result); spatial patterns (arrangement of objects within an event); policy (principles, rules and guidelines for managing events); and creating knowledge through research and theory.

- Demand- and supply-side outcomes (outcomes and the impacted)

This represents the agendas and outcomes each role-player has for being part of an event, as well as the impact an event can have ranged from personal, societal, cultural, economic, environmental and political (Getz, 2008:413). The demand side representing the attendees and the supply side; the event organisers.

What is more, Getz (2007:10; 2012a:8) incorporated the elements mentioned above in creating a framework for understanding and creating knowledge concerning event tourism (Figure 3.3). The framework is used primarily as a structuring device to capture and refine the large body of literature on event tourism and provide managers and policymakers with a framework for shaping their overall understanding of and approach to event tourism (Getz, 2008:404). The problem with this framework is that it is not particularly integrative. Instead, the emphasis of this framework lies in 'identifying key research questions on each theme and suggesting possible research methods' (Pearce, 2012:69). In this way, the framework and its associated themes represent a comprehensive research agenda for researchers, serving as a useful tool in the problem formulation and research design phases of research (Pearce, 2012:69). In other words, the purpose of the framework is in 'spurring theoretical advancement, identifying research gaps, and assisting professional practice' (Getz, 2008:404).

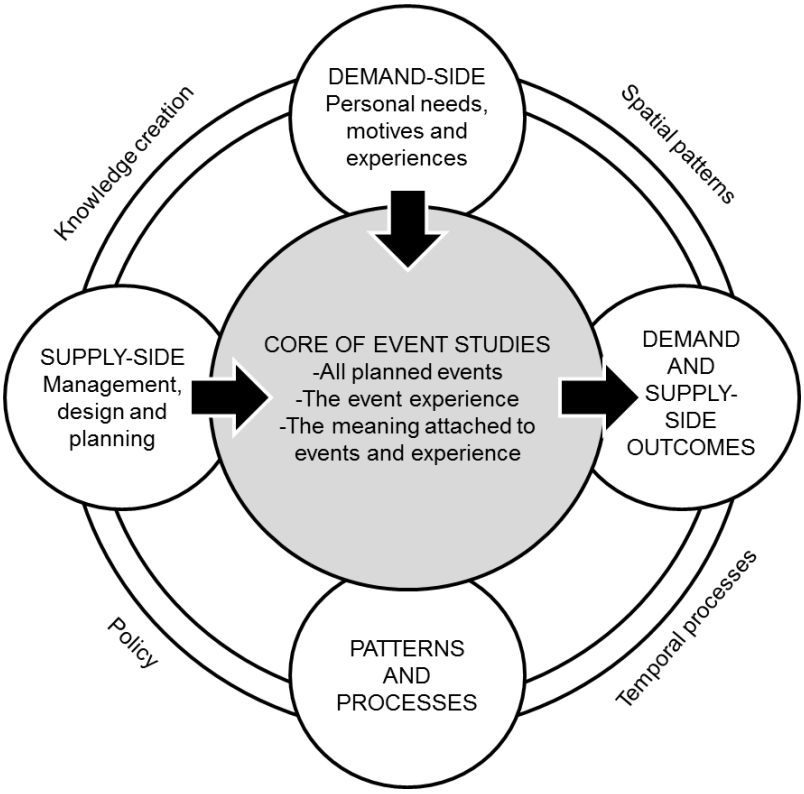

Figure 3.3: Framework for event tourism: understanding and creating knowledge on planned events

Source: Adapted from Getz (2012a:8)

One area in which theoretical structuring of a planned event in event tourism still possesses an issue is whether events should be classified as attractions or activities or both (Tassiopoulos, 2010:10). Jago and Shaw (1998:24) propose that events function as a hybrid that combines both the attraction and a range of activities. To help classify planned events, Jago and Shaw (1998:24) developed a nomological structure that aims at differentiating between different types of events. Getz (1997:7) on the other hand developed a typology of events to aid research in establishing the events sector and its segments. To incorporate planned events in events tourism, Getz and Page (2016:594) later developed a typology of planned events within event tourism. These classifications will subsequently be examined in the following sections.

3.3.1. Classification of planned events

Planned events have become a domain for professionals due to their use in satisfying various strategic goals (Getz, 2008:404). These strategic goals may serve to benefit various entities, including the image of a destination, thus being too risky to be left to amateurs (Getz, 2008:404). It is up to event managers to provide professional practice devoted to the design, production, and management of different planned events in reaching these strategic

goals (Getz, 2008:404). Event management is responsible for organising successful events, requiring a knowledgeable understanding of events and their typologies. Lewin and Somekh (2005:349) identify typology as a term used for a listing of tabulating phenomena into categories and hierarchies. In planned events, typology may serve as an organising framework for listing events and their purpose/outcomes (Lunt, 2011:47). One such typology of planned events is illustrated in Figure 3.4.

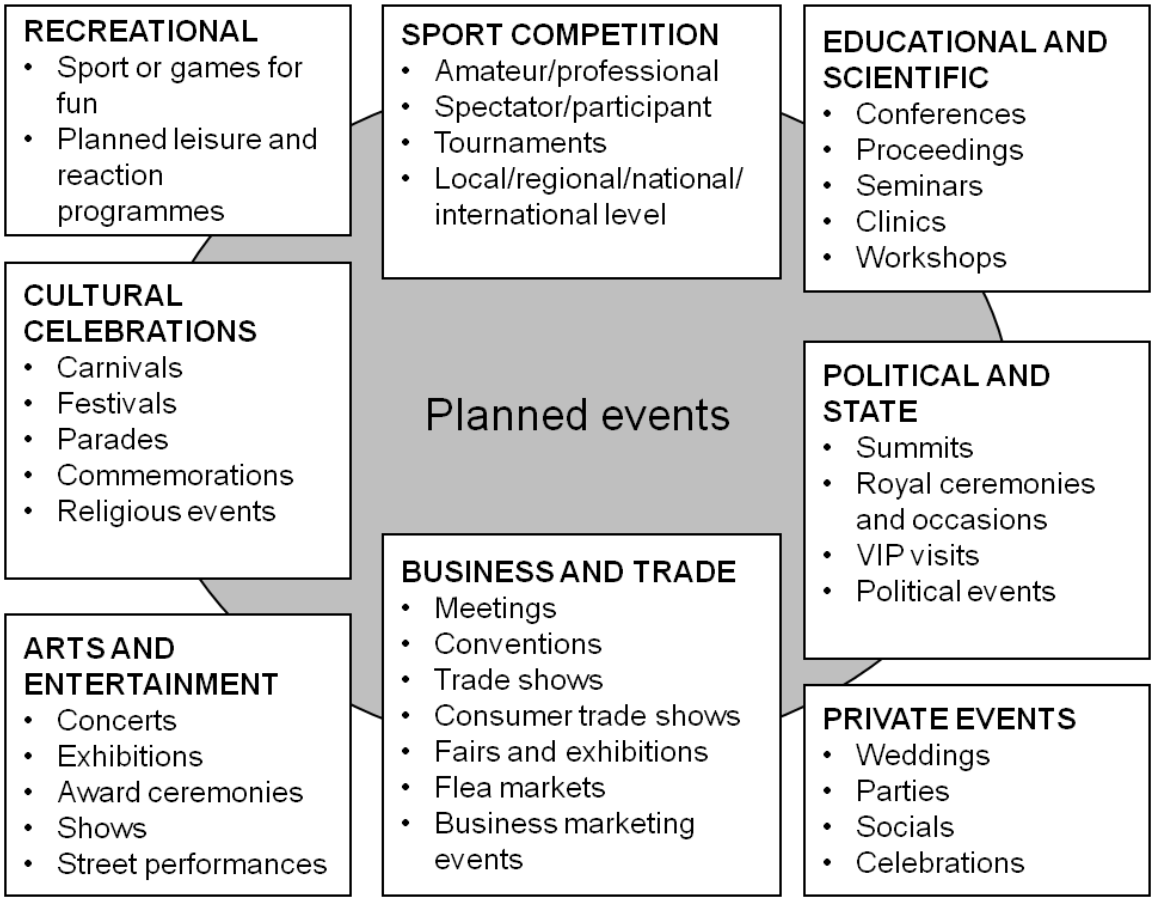

Figure 3.4: Typology of planned events

Source: Adapted from Getz (2008:404) and Oklobdžija (2015:88)

The typology in Figure 3.4 categorises planned events primarily on their form or content - differences in purpose and program (Çelik & Çetinkaya, 2013:7). Cultural celebrations, for instance, represent the community and public celebratory events that aim at fostering civic pride and cohesion, while the other categories are planned for purposes of competition, fun, entertainment, business or socialisation (Çelik & Çetinkaya, 2013:7; Getz, 2008:404).

Another way events can be categorised is according to their tourism attractiveness (Oklobdžija, 2015:89). Even though the majority of events are tourism driven such as those identified within the typology of planned events, little thought has gone into many of them for

their tourism appeal or potential (Oklobdžija, 2015:89). The reason being that no relationship was established between specific events and tourism or that the aims of the organisers do not accommodate this relationship (Oklobdžija, 2015:89; Getz, 2008:405). The purpose of planned events within a tourism context or planned tourism event is to systematically plan, develop, market and hold events as tourism attractions (Hattingh, 2014:5). To accommodate this notion, Getz and Page (2016:594) developed a typology of planned events within an event-tourism context (Figure 3.5). This typology took inspiration from work done by Allen, O'Toole, Harris and McDonnell (2005:11-16) and Van der Merwe (2008:18) who categorised planned events within a tourism context according to 'form and content'. The original categorisation done by Allen *et al.* (2005:11-16) comprised three categories, namely festivals, MICE events (Meetings, Incentives, Conventions, and Exhibitions) (business events) and sport events. Getz and Page (2016:594) later added arts and entertainment to their typology of planned events within event tourism, with the addition of their associated venues.

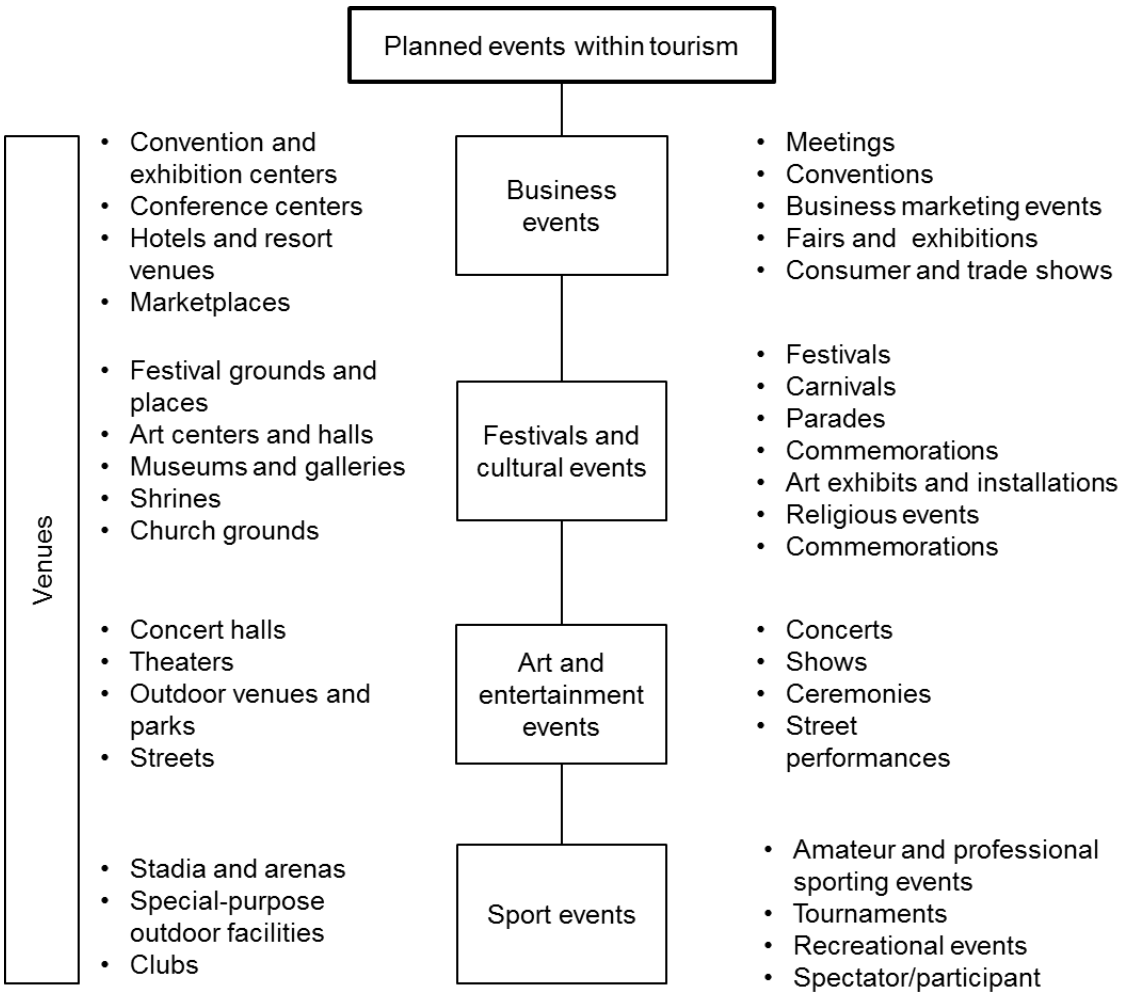

Figure 3.5: Typology of planned events within event tourism

Source: Adapted from Getz and Page (2016:594)

Each of the categories identified in the typology of planned events within event tourism (Figure 3.5) will subsequently be discussed briefly.

- Business events

Business events, also known as MICE events, are defined as all off-site gatherings that bring people together for a common purpose of sharing knowledge (Allen *et al.,* 2005:15). Different types of event within the business sector include conventions, congresses, exhibitions, conferences, seminars, workshops and symposia (Allen *et al*., 2005:15). Business events (or the MICE sector) make use of convention and exhibition centres, including numerous smaller venues such as restaurants, hotels, or resorts and are held to promote company brands and products, and to create networking (Foley, Sclenker, Edwards & Lewis-Smith, 2013:315-316). Although their primary focus surrounds business and trade, they can also include non-business-related activities (Van der Merwe, 2008:23).

- Festivals

Festivals are some of the most common events found across the world and because of this; they are often regarded events staged to increase tourism (Quinn, 2006:289). However, when describing a festival, one should not merely pass it as an ordinary event (Quinn, 2006:289). They are special events with a social and cultural function of community and destination development and not simply directed to an economic purpose of generating tourism revenue (Quinn, 2006:304). Getz (2005:21) defines festivals as 'themed, public celebrations'. The involvement of the community is what distinguishes them from other events (Arcodia & Robb, 2000:157). Moreover, Bowden *et al.* (2006:18) classify festivals under cultural events. Unlike business or sport events, festivals and cultural events are less dependent on facilities and can take place in parks, streets, theatres, concert halls or other public or private venues (Getz & Page, 2016:594). Festivals and cultural celebrations can be held for different reasons including a display of cultural, religious, creative or civic celebration (Janiskee, 1980:97; Quinn, 2009:486; Turner, 1982:11). The different types of festivals include culture, heritage, arts/crafts, wine, music, historical, local and regional fairs, harvest, religious, pageant, re-enactment, food, ethnic and also gay and lesbian festivals (Allen *et al*., 2005:14; Silvers, 2003:internet).

- Entertainment

The entertainment industry ranges from media, cinema, radio, television, recorded music, video games, film, publishing, theatre, museums, shopping, sports, theme parks, casinos and gambling to travel, tourism, and special events (Roberts, 2004:61; Vogel, 2004:355). All

these categories are so inclusive that it defies a measurement for what entertainment events entail, but there is no doubt that theatre, concerts, shows, and spectacles form a large part of event tourism and entertainment (Getz & Page, 2016:607). Entertainment events, such as concerts (music concerts) are usually provided by the private sector using many types of venues to provide mainstream entertainment experiences to the public (Ross, 2001:6). Art events, however, focus less on mainstream popularity and more on refinement and 'high culture' (cultural products of aesthetic value) (Getz & Page, 2016:594). Examples of entertainment and art events include gala performances, concerts, shows, ceremonies and street performances (Getz, 2008:404; Getz & Page, 2016:594; Oklobdžija, 2015:88). Venues for such events include concert halls, theatres, outdoor venues, and parks, as well as exhibition venues.

- Sport events

Sport events are spectator or participatory events involving recreational or competitive sport activities (Silvers, 2003:internet). The activities can be scheduled alone or in conjunction with other events (Silvers, 2003:internet). Sport events are also highly acclaimed by governments since it provides the public with entertainment and attracts national and international visitors and revenue (Van der Merwe, 2008:23). Sport events also require special-purpose facilities such as athletic parks, arenas, and stadia, and can be held to promote a love of sport and fitness (Ross, 2001:6). What makes sport events unique is that they can vary in 'size and scale' (Allen *et al.* 2005:15). An example would be that of district club football which represents a small event while a world cup football championship (FIFA World Cup) represents a Mega event.

Differences in 'size and scale' are not only limited to sport events but amongst others, planned events as well. To reference this statement, one can look into the different venues used for the events mentioned above. Therefore, it is possible to categorise planned events according to 'size and scale' as will be outlined in the next section.

3.3.2. Size and scale of planned events

It is unlikely for events to have a single, all-embracing definition since they can vastly differ in type or perspective, not to mention when viewed internationally, nationally or locally (Jago & Shaw, 1998:24). As such, Jago and Shaw (1998:24) developed the events nomological structure. In this structure, viewed from a planned events perspective (Figure 3.6), events consist of 'ordinary' and 'special events' (Tassiopoulos, 2010:10). 'Special events', a generic term used in a touristic sense, are categorised into 'minor special events' and 'major special

events' (Tassiopoulos, 2010:11). Two categories have been identified for major special events, namely 'hallmark events' and 'mega-events' (Tassiopoulos, 2010:10).

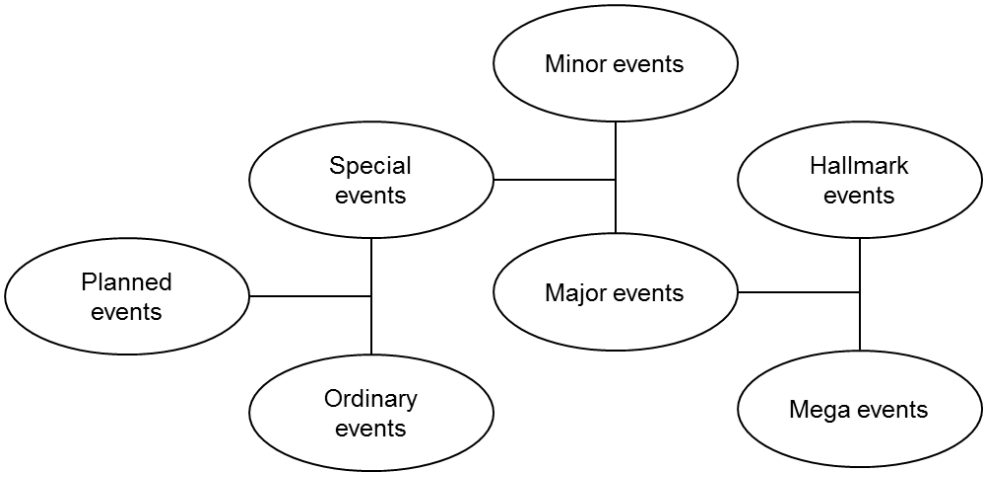

Figure 3.6: Planned events nomological structure
Source: Adapted from Jago and Shaw (1998:24) and Tassiopoulos (2010:11)

Alternatively, an international categorisation of planned special events sees hallmark events taking a tourism approach, while an approach based on impact is described by mega, major and local events (Hofman, 2011:9). These categories of events are based on 'size and scale' (Allen *et al*., 2005:110), with local events representing minor special events. Figure 3.7 illustrates this typology of the main international categories of planned events based on 'size and scale'. At the highest end, a mega event has the largest impact and at the lowest is 'local/community events'.

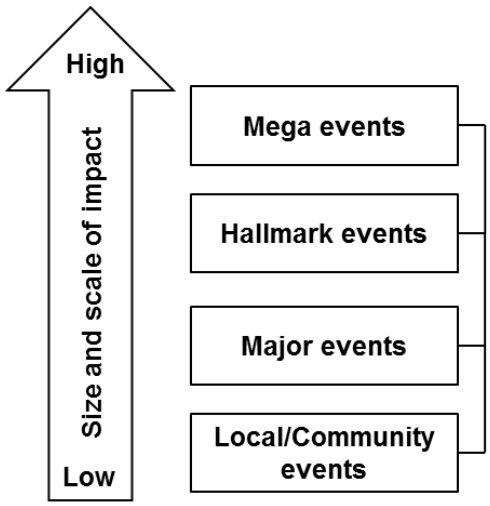

Figure 3.7: Typology of the main international categories of planned events: Size and scale
Source: Adapted from Allen *et al*. (2005:110)

- **Hallmark events**

Starting with the tourism approach, although having a smaller impact than mega events, hallmark events are primarily held to generate attention to a place city or region (Hofman, 2011:10). Hallmark events are built around major themes and serve as a tourism-planning tool for destinations (Getz, Svensson, Peterssen & Gunnervall, 2012:48; Ritchie & Beliveau, 1974:14). As time goes on, hallmark events can even become synonymous with a destination (Hofman, 2011:10). The authenticity or excellence they present a destination, not to mention being a symbol of quality, is what sets them apart from other events (Getz, 1991:51; Getz, 2005:5; Jafari, 2002:210). An example would be the E3 Gaming Expo in Los Angeles, Oktoberfest in Munich or the Rio Carnival in Brazil. It has also been suggested by Hall (1992:1) that hallmark events are image builders of modern tourism. Their high prominence in the tourism marketplace can hold social, economic and financial benefits long after the event has taken place (Hofman, 2011:10). Being one of the first to do so, Ritchie (1984:2) defined hallmark events as:

> Major one-time or recurring events of limited duration, developed primarily to enhance the awareness, appeal, and profitability of a tourism destination in the short and long term. Such events rely for their success on the uniqueness, status, or timely significance to create interest and attract attention.

Getz (2005:5) later redefined it as a term 'used to describe a recurring event that possesses such significance, regarding tradition, attractiveness, image or publicity, that the event provides the host venue, community or destination with a competitive advantage.'

By means of impact approach, mega, major and local events can present a destination with various economic, marketing, socio-cultural, and physical benefits (Hofman, 2011:10).

- Mega events

Mega events attract worldwide interest and can lead to many improvements for host cities and destinations, especially when it comes to infrastructure development (Carlsen & Millan, 2002:646). Mega-events are also occasionally equated to 'hallmark events' (Hall, 1992:1), since both events are particularly large in size (Getz *et al.,* 2012:50), hold the potential of attracting worldwide publicity (Vanhove & Witt, 1987:11), and are associated with having an extraordinary and memorable status (Roche, as cited by Torkildsen, 2005:468). The debate surrounding the terms unfortunately is on-going since no clear differentiating definition exists (Hofman, 2011:10). To give an example, Marris (1987:3) stated that mega events should exceed one million visitors, while Getz *et al.* (2012:50) on the other hand pointed out that even small events could have a 'mega' impact on a small town. To clarify, Getz (2007:25)

provided a more acceptable definition of ‘mega-events’ in that they are events that yield particularly high levels of tourism, media coverage, prestige, or economic impact for the host country, region, community, venue or organization. Mega events have also been recognised and defined as being ‘a one-time major event’ (Bowden, Allen, O’Toole, Harris & McDonnell, 2006:18) and one that changes location (Masterman, 2014:21). An example of such an event is the FIFA Soccer World Cup, which was held in South Africa in 2010.

- Major events

Opposite to hallmark and mega-events, major events are smaller conventional events that take place more regularly but, like mega events, can attract a large number of visitors and grab national or international media attention (Hofman, 2011:10). Major events are also expensive to host and hold the potential of being prestigious and financially profitable and leave a legacy (Jago & Shaw, 1998:29; Torkildsen, 2005:469). Some of the most common types of major events are large sporting events that can take place regularly on an annual basis (Allen *et al*., 2005:13). In South Africa, international rugby league events such as The Rugby Championship and the Super Rugby Championship can be considered major events. According to Müller (2015:365), for an event to qualify as a major event it should at least have one of the following characteristics:

  - > 500 000 in ticket sales;
  - >USD 100 million (±R1.2 billion) value in broadcast rights;
  - >USD 1 billion (±R12 billion) in capital investment; and
  - >USD 1 billion (±R12 billion) in total costs.

- Local events

Local events, the smallest of all specially planned events, take place on a city or municipality scale (Douglas, Douglas & Derret, 2001:358; Hofman, 2011:10). Different from major, mega and hallmark events, local events attract a small number of people (Hofman, 2011:10). They are often defined as family fun events produced by local government agencies or non-governmental organisations (NGOs) using public services, venues or facilities (Hattingh, 2017:7). Businesses occasionally also use local events to promote organisation awareness (Hofman, 2011:10). When used to fulfil community-related objectives, local events can be seen as community events (Hattingh, 2017:7). Local or community events can have varied themes ranging from local sporting championships, markets, food and wine shows, all the way to multicultural festivals (Small, Edwards & Sheridan, 2005:66). Small events such as local or community events may generate little economic activity and international attraction

but can contribute more directly to a community's well-being and satisfaction (Agha & Taks, 2015:200).

Bearing in mind the categories indicated above, it is evident that planned events can differ in 'size and scale' and 'impact'. This includes having huge tourism and economic impact, to smaller impact that directly influences community satisfaction. Since these types of benefit were merely mentioned in this section, the following section serves to provide a more in-depth look into planned event benefits.

3.3.3. Benefits of hosting planned events

Why would one host an event if it would not benefit or contribute to anything? The answer would probably be that there would be no reason to do so. It is evident from the previous two sections that planned events are purposefully held for different reasons and, based on their 'size and scale', can have different impacts. It is also evident that large events, such as mega-events, can have large-scale economic, infrastructure and tourism ramifications while small events can have community-specific impacts (Agha & Taks, 2015:200). Having said this, Getz (1997:43) provided a three-sector classification of planned events to summarise the reasons for hosting or investing in planned events. The three sectors are as follows (Getz, 1997:43):

- Private, for private-organisations
    - Organisations producing events for profit, either individually or under contract;
    - Corporations creating events for self-promotion or marketing and sales reasons;
    - Hotels, resorts or facilities using events to attract visitors and to establish an image/improve their image.
- Non-profit-making or voluntary:
    - Charity or causes using events to obtain revenue and support, and grow awareness;
    - Community-based societies and informal groups stage events to support community causes, initiatives and activities.
- Government agencies or public-private groups:
    - Leisure, sport, and social agencies organise events to support and foster sport, health and social integration;
    - Tourism agencies and economic development initiates stage events to create employment and income;

- Arts and culture agencies stage events to foster appreciation, participation and cultural and heritage sustainability.

Having a reason to host an event is one thing, but many government officials, policymakers, charity organisations, businesses, event managers or even public role-players will not do it without weighing cost against benefits (Nelson, 2014:82). Costs to benefits will predominantly be of a financial nature (Oldenboom, 2006:55), but costs could also refer to insufficient investment, congestion or overcrowding, increased tax rates or unnecessary public expenditure, unused infrastructure after events, unsupportive communities or unsuccessful events (Pettinger, 2017:internet). When benefits outweigh the costs, it can be considered feasible to spend money on an event (Oldenboom, 2006:56). This then raises the question: What are the benefits of planned events? From an organisation perspective this is covered by the reasons for hosting events, but from a destination and visitor perspective see the following two sections.

3.3.3.1. Destination benefits of hosting planned events

In an economic sense, benefits represent the change in wealth that attributes to an investment (Oldenboom, 2006:56). The potential of economic regeneration is one of the most important reasons why many events are held, particularly large events or sporting events (Davies, 2011:227; Pettinger, 2017:internet; Taks, Kesenne, Chaplin & Green, 2011:188). Economically, there are two sides to measuring benefits (Morgan & Condliffe, 2014:83). The first side is the one-time benefits derived from the construction phase such as construction expenditures and employment (Morgan & Condliffe, 2014:83). The second being operational benefits, which refers to the continuous benefits because of the event and infrastructure that was built to support it (Morgan & Condliffe, 2014:83). An example would be the stadiums that were built to support the 2010 FIFA World Cup in South Africa. During the construction phase, people had to be employed to build the stadiums while during their operational phase people had to be employed to clean, maintain and staff them. Even after the World Cup, the stadiums still needed staffing since other events and sport clubs presently make use of them.

Events also have a direct and indirect (secondary) economic impact on the hosting destination (Hodur & Leistritz, 2014:71). The economic impact refers to the net increase in regional expenditure due to an event (Hodur & Leistritz, 2014:71). Direct economic impact refers to any new money, or new spending that would not have occurred in the absence of the event, and is not to be confused with total expenditures, which represents all expenditures by event participants and visitors (Hodur & Leistritz, 2014:71). To differentiate

between the two, it is important to determine visitor motives for attending a particular event and what they would have done in the absence of said event (Tyrrell & Johnston, 2011:334). Secondary economic benefits 'arise from the spending and re-spending of initial expenditures (direct impacts) within the study area economy and are sometimes termed 'multiplier effect' (Hodur & Leistritz, 2014:73). *Multiplier effect* simply means the number of times the money spent by a visitor/tourist circulates through the local economy, leading to an income of a more significant amount than the initial money spent (Barcelona Field Studies Centre, 2017:internet).

Events may impact other aspects of a destination as well. Destination impacts, other than economic benefits, can include a boasted image and a sense of prestige among the community members, and create long-term investment in infrastructure development and maintenance (Pettinger, 2016:internet). Events such as charity or awareness campaigns can also be held to help conserve sensitive natural, social and cultural environments of a destination (Backman, Backman, Uysal & Sunshine, 1995:16). Community-wise, events can provide local entertainment and create jobs besides holding the potential of promoting local culture, improving well-being and boosting enthusiasm for tourism development (Pettinger, 2016:internet). The use of community members in cultural activities at events can promote cultural exchange and enhance a community's pride and cohesiveness (Yolal, Gursoy, Uysal, Kim & Karacaoglu, 2016:2). Tourism-wise, events provide the perfect opportunity of extending tourism seasonality to a destination and attracting new tourists (Connell, Page & Meyer, 2015:284).

Moreover, Table 3.5 provides a brief summary of event studies that have explored planned event benefits. This is but a brief compilation made by the author since there are many other not-mentioned event studies that cover these aspects. The area of benefit mentioned in the table represents some of the key areas most studies focused on, such as education, tourism, the community, the destination, the economy, and culture.

Table 3.5: Benefits of hosting events: A summary of event studies

Area of benefit	Research authors	Title of study
Economic	Agha and Taks (2015)	A theoretical comparison of the economic impact of large and small events
	Bohlmann and Van Heerden (2005)	The impact of hosting a major sport event on the South African economy
	Madlen and Grzegorz (2015)	The economic impact of events and festivals on host regions - methods in practice
Socio-economic	Jeong and Faulkner (1996)	Resident perceptions of mega-event impacts: The Taejon International Exposition case
	Grunwell and Ha (2007)	Film festivals: An empirical study of factors for success
	Quinn (2006)	Problematising 'festival tourism': Arts festivals and sustainable development in Ireland
Tourism (image, seasonality, and marketing)	Richards and Wilson (2004)	The impact of cultural events on city image: Rotterdam, Cultural Capital of Europe 2001
	Allen, O'Toole, McDonnell and Harris (2002)	Festival and special event management
	Fourie and Santana-Gallego (2010)	The impact of mega-events on tourist arrivals
	Spronk and Fourie (2010)	South African mega-events and their impact on tourism
Community (employment, support, and reception)	Gursoy and Kendall (2006)	Hosting mega events-modelling locals' support
	Ferdinand and Williams (2013)	International festivals as experience productions systems
	Fredline and Faulkner (2000)	Host community reactions: A cluster analysis
Cultural (cultural exchange and socio-cultural benefits)	Del Barrio, Devesa and Herrero (2012)	Evaluating intangible cultural heritage: The case of cultural festivals
	Gursoy, Kim and Uysal (2004)	Perceived impacts of festivals and special events by organisers: An extension and validation
	Attanasi, Casoria, Centorrino and Urso (2013)	Cultural investment, local development, and instantaneous social capital: A case study of a gathering festival in the South of Italy
	Arcodia and Whitford (2006)	Festival attendance and the development of social capital
	Manolika, Baltzis and Tsigilis (2015)	Measuring motives for cultural consumption: A review of the literature
Educational (teaching opportunities and exchange of knowledge)	Dwyer, Mellor, Mistilis and Mules (2000)	A framework for evaluating and forecasting the impacts of special events
	Mertova and Webster (2014)	Critical event narrative inquiry in higher education quality
	Presbury and Edwards (2005)	Incorporating sustainability in meetings and event management education

Well-being and quality of life	King, Pizam and Milman (1993)	Social impacts of tourism: host perceptions
	Yolal *et al.* (2016)	Impacts of festivals and events on residents' well-being
	Uysal, Sirgy, Woo and Kim (2016)	The quality of Life (QOL) and well-being research in tourism
	Uysal, Perdue and Sirgy (2012)	Handbook of tourism and quality-of-life research: Enhancing the lives of tourists and residents of host communities

Source: Author's own compilation

The above listed studies indicate but a few of the benefits explored for hosting planned events. Many of these benefits can directly influence the visitor's experience. For a more detailed discussion on visitor-specific benefits from hosting planned events, see the following section.

3.3.3.2. Visitor benefits from hosting planned events

Events differ from one another, so too will the benefits sought after by their respective audiences. According to Lee, Arcodia and Lee (2012:223), visitors in general may seek events to experience satisfying experiences (psychological benefits), to learn new things (educational benefits) and to share interests (social benefits) (Lee *et al*., 2012:223). By hosting events that allow tourists to interact with an area, its community and heritage, tourists can be provided with learning opportunities to better understand/create awareness of a destination's culture and natural resources (Grames & Vitcenda, 2012:internet; Yolal, Çetinel & Uysal, 2009:286). Concerning charity events, visitors may seek to become more knowledgeable about a cause or to socialise and engage with people supporting the cause (share interests) (Snelgrove & Wood, 2010:273-274). Charity events may also serve as an alternative opportunity for visitors to simply visit and learn about a destination (Snelgrove & Wood, 2010: 273-274), but this could also be the scenario for many other events. Many people attend sport events to support their teams, athletes or countries and to socialise, whereas a winning team may have a positive impact on game attendance (Douvis, 2014:50-51). As a niche market, science festivals may attract visitors who wish to meet scientific researchers and to have different types of science engagement (Jensen & Buckley, 2014:570). As a more common type of festival, music festival attendees may seek to attend to support their artist, to have a unique experience, discover new artists and socialise with friends (MusicWatch, Inc., 2016:9). Alternatively, events can benefit from its visitors when

said visitors communicate their experiences through word-of-mouth, multimedia (Facebook and Twitter) or print media (newspapers, journals or magazines) (Schaaf, 1995:49).

Understanding the reasons why visitors would want to visit events, as well as the organisers' motives for hosting events is a critical part of this study. In particular, the focus for conducting visitor (demand side) and organiser (supply-side) research will be on exhibitions, expositions, and conventions. Knowledge on visitor behaviour can help exhibition and exposition organisers to plan and work towards providing satisfying experiences that may be reflected through word of mouth, multi-media and print media. To gain a better understanding of exhibitions, including expositions, trade shows, trade fairs and conventions, the following section will serve as an examination of these planned events within event tourism.

3.4. The MICE sector: Understanding exhibitions

The MICE sector - namely Meetings, Incentives, Conferences and Exhibitions/Events represents a 'special kind of tourism' or 'special event' in that the meeting, convention or exhibition serves as the primary purpose for travel (Hiller, 1995:375). Considerable growth has been documented over the past decade for the MICE sector (Fenich, Hermann & Hashimoto, 2012:40). It is also one of the fastest growing sectors of the tourism industry (Vaid, Kesharwani & Dubey, 2016:71). 'MICE' or business events are a niche group within tourism that is dedicated towards planning, booking and facilitating conferences, seminars, meetings, workshops, exhibitions, trade fairs, conventions, symposia, incentive travel and expositions (Hiller, 1995:375; Khan, 2015:299). They are multi-faceted and professionally organised events of a fixed time and duration whereby the planning phase usually starts well in advance (Hiller, 1995:375; Khan, 2015:299). Activities and associates involved in planning and hosting of MICE events usually include meeting planners, logistic firms transfer/shuttle companies; private tour operators; incentive houses; professional and business trade organisations; tourism boards; tourism trade associations, travel-selling professionals, catering managers, venues and facility managers (Khan, 2015:299). An illustrative overview of the MICE industry is presented in Figure 3.8.

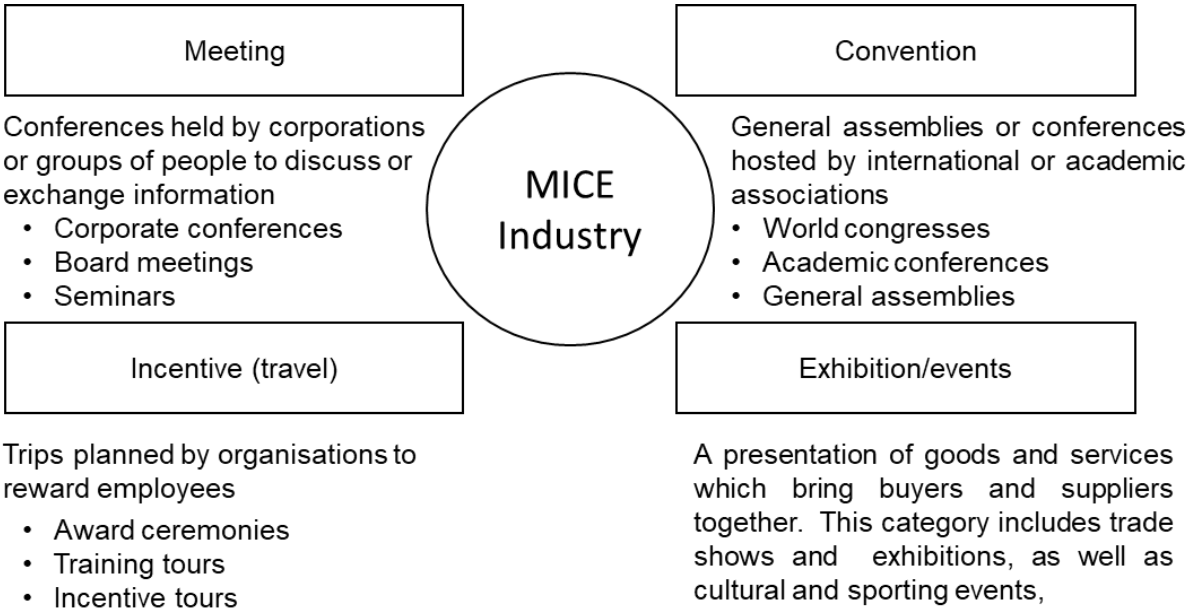

Figure 3.8: The MICE Industry
Source: Adapted from Khan (2015:302)

MICE events are largely characterised by business and trade, but may also include substantial public aspects in their activities (Bowdin, Allen, Harris, McDonnell & O'Toole, 2012:25). This can be found in business to consumer shows where the trade and business activities are directed towards the public (Bowdin *et al*., 2012:25). Exhibitions and trade fairs are examples of such shows (British Visits and Event Partnership [BVEP], 2014:37). They are events that revolve around a particular industry sector, bringing suppliers of goods and services together with their respective buyers (target audiences) (Bowdin, O'Toole, Allen, Harris & McDonnell, 2006:21). Internationally, the terms exposition, expo, trade fairs and show (trade/consumer) are occasionally used interchangeably, while in the UK the term 'exhibition' has been adopted as the overarching term (Bowdin *et al*., 2006:21). Therefore, in keeping with this study's continuity, whenever the term 'exhibition' is mentioned and not exposition or expo (in the same sentence or title), the term 'exhibition' will present an overarching term.

'Exhibition' is understood by Bowdin *et al*. (2006:21) and the Exhibition Liaison Committee (1995:2) to be an event providing a presentation of products or services to an invited audience with the purpose or objective of inducing a sale or providing information. Similarly, Rogers (2003:16) sees it as a professionally organised event that facilitates the meeting of sellers and buyers. Moreover, they can be defined according to the market or visitors they target (BVEP, 2014:37). As such, exhibitions may be business-to-business (B2B), business-to-consumer (B2C) or public/trade exhibitions that attract both types of visitors (Rogers,

2003:16). B2B exhibitions are primarily aimed at those working in a particular trade sector and serves as a meeting place to fulfil a multitude of business objectives (BVEP, 2014:37). Public exhibitions are aimed at the general public or focussed on consumer groups, while a combination of both trade and public exhibitions allow for trade representatives and consumers to meet amongst one another (BVEP, 2014:37). Thus, expositions, exhibitions, trade shows and fairs can serve the businesses as well as the consumer realm (Beier & Damböck, 2011:4).

This means that there is much more to the terminology, which is 'exhibition'. A review of the terminology and literature can assist in identifying how exhibitions are classified and managed, the benefits of hosting them and also in identifying their current state in South Africa. The following section aims to provide a comprehensive review of these topics starting with how exhibitions are classified.

3.4.1. Classification of exhibitions

The root of the terms 'fairs, expositions, and exhibitions' can be traced back to the Latin word 'feria', which meant holiday as well as market fair (Barnhart, 1988:366). 'Feria' also accords with the Latin word 'feriae,' meaning 'religious festival' (Barnhart, 1988:366). Evidence of this connection can be traced to the 12th century when fairs were held close to churches; thus this concept (religious festival and market fair) was combined in the common language (Walters, 2000:7). The term 'fair' also dates back to Middle Age English with the word 'feire' which means the gathering of people at regular intervals to trade or barter goods (Morrow, 2002:11). During this period, trade-related meetings grew in popularity and importance (Walters, 2000:7).

The word 'exhibition' however was mentioned some years later and can be found used as early as 1649 (Morrow, 2002:11). The term derived from the Latin word 'exposition', which refers to 'displaying' or 'putting on a show' (Morrow, 2002:11). Interestingly, the term 'exposition' was also a relatively new term used when the term exhibition first started circulation (Beier & Damböck, 2011:3). The term exposition also had its roots in old French and was used similarly to its English counterpart, exhibition (Beier & Damböck, 2011:3). Unlike exhibitions, expositions were held in facilities built specifically for them (Beier & Damböck, 2011:3). In the past, expositions were organised by the government or by groups of entrepreneurs with government support with the purpose of promoting trade (Morrow, 2002:11). Manufacturers were usually invited to expositions to show or promote their goods (Morrow, 2002:11). Today, expositions and exhibitions not only serve as a collection of interesting objects brought together at a defined time and space but as a form of human

exchange where exhibitors and promoters communicate with visitors (Beier & Damböck, 2011:3). On topic, Kárpáti and Vásárhelyi (2013:109) suggested a categorisation of exhibitions based on venue type and event duration. In this categorisation, exhibitions are divided into four types of events, namely (Kárpáti & Vásárhelyi, 2013:109):

- Chamber exhibitions - A small-scale display or exhibit that is open for a brief period ranging from a few hours to a week. These events include conferences, trade shows, expositions or festivals.
- Temporary exhibitions - Regularly organised exhibitions that can last a few weeks to a couple of months. The duration of these exhibitions usually depends on the collection displayed, the schedule of facilities and the potential visitors. Art galleries and museums are the usual culprit venues for these types of event.
- Permanent exhibitions - An exhibit that may last for years and are common among museums. Many museums consider an exhibition out-dated after five to ten years.
- Travelling exhibitions – An exhibit that is loaned between venues for months or even years, which is more or less constant throughout its lifecycle in form and content. Museums and exhibition centres can play host to travelling exhibitions.

Another categorisation of exhibitions, as identified by the Exhibition Liaison Committee (1995:8), focuses on the type of exchange taking place. In this categorisation by the Exhibition Liaison Committee (1995:8), exhibitions are divided into four types of events, namely agricultural shows (country-side shows held once a year for one to 5 days), consumer shows (business-to-consumer shows), specialised trade shows (business-to-business shows) and private exhibitions (exclusive invitation shows). Beier and Damböck (2011:4) later adapted these categories to better differentiate between the conceptual aspects that exist among fairs, expositions, and exhibitions because of their similarity in purpose and nature (see Figure 3.9).

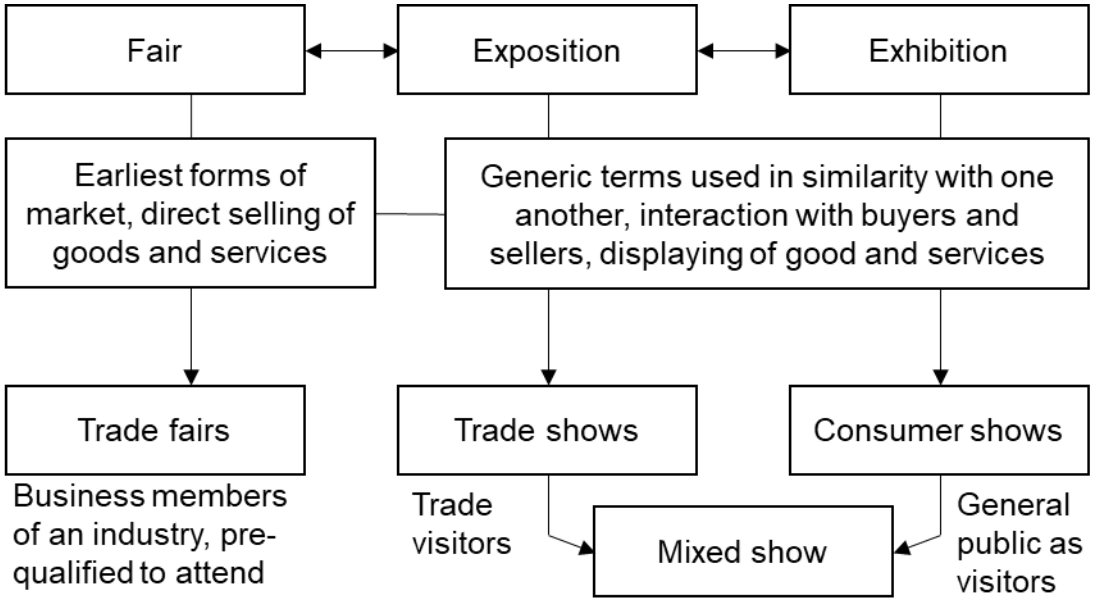

Figure 3.9: Types of exhibition

Source: Adapted from Beier and Damböck (2011:4)

As displayed in Figure 3.9, four types of exhibition exist, namely trade fairs, trade shows, consumer shows and mixed shows. Firstly, trade fairs are confined to a specific industry or a specific segment of an industry and are primarily used as a marketing medium of exporting countries (Beier & Damböck, 2011:6). Buyers are usually pre-qualified for a trade fair and trade fairs usually involve business members of industry (Morrow, 2002:14). An example of a trade fair is that of China's Import and Export Fair or also known as 'Canton fair' held twice a year.

Secondly, trade shows are B2B events, where companies can display and demonstrate their products and services (Beier & Damböck, 2011:6). They are the marketplace for commercial suppliers of products and services and are often held annually at the same period in the same location (Wong, Li, Peng & Chen, 2014:325). Trade shows are usually limited to company representatives, distributors, industrial end users and members of the press, but some trade shows with consumer goods are open to the public (Beier & Damböck, 2011:8). Examples of B2B trade shows are the My Business Expo in Durban (10 Times, 2017:internet) and the Small Business Expo in the United States (Small Business Expo, 2018:internet).

Thirdly, consumer shows (B2C), also known as public shows or consumer trade shows, are business-to-consumer shows (Gottlieb, Brown & Ferrier, 2012:90). Consumer shows are essential avenues for manufacturers and retailers to engage with their target markets

(Gottlieb *et al*., 2012:90). The primary purpose of consumer shows is to directly sell products to the consumer (public) while providing the consumer with a diverse product mix, expert advice, educational value and entertainment (Beier & Damböck, 2011:10).

Lastly, in the case of a mixed show, the show is open to both trade and public visitors (Beier & Damböck, 2011:10). Mixed shows are therefore a combination of both public and trade shows (Bowdin *et al*., 2012:26-27; Rogers, 2003:16). An example of a mixed show can be the London Boat Show in England or the East Rand Show in Benoni, Johannesburg.

Regardless of the type, all exhibitions have a basic structure that needs to be addressed. This includes the venue (facilities), duration, attendee and exhibitors, marketing and promotion, understanding the trends and running the exhibition (Northern Virginia Community College, 2012:1). Addressing these basic structures relies on the expertise of exhibition managers (see Northern Virginia Community College, 2012:1). As a marketing tool, it is important for exhibitions to be organised by such professionals to ensure its success as a marketing medium (The Global Association of the Exhibition industry [UFI], 2016:1). The reason being that no other marketing tool exists that offers the same level of transparency where products are presented physically and in detail, and complemented by direct customer contact (Koong, 2000:2). Since exhibition managers are clearly important to the success of exhibitions as a marketing tool or as a marketing mix for industries (see McCoy & Du Plessis, 2000:460), this then raises the questions as to what exhibition management is and why it is important.

3.4.2. Exhibition management

Event management or event organisers are professionals that provide services in organising events from conceptualisation and planning towards hosting the complete event (Thailand Convention and Exhibition Bureau [TCEB], 2014:150). Event management follows defined aims and objectives that serve as guidelines for planning and controlling event activities (TCEB, 2014:150). This is no different for the MICE sector since multiple aspects must be planned and managed, prior to, during and after the event (TCEB, 2014:161).

Successful organisers of MICE are those who accurately predict the future macro-environment and who plan to efficiently adapt to changes (Swarbrooke & Horner, 2001:73). The macro-environment involves the entire economy of business and represents the political, economic, social and technological factors of a business (Frue, 2017:internet). All these factors can influence event organisers in the way they manage financial resources, human resources, operations and marketing (Reynolds, 2008:11). Politically, legislation and

regulation can affect marketing campaigns and their content; economic situations can affect the financial capability to attend events, lifestyle changes and emerging trends affect changes in demand, while new technologies can impact marketing efficiency (Swarbrooke & Horner, 2001:73-74).

To maximise positive local economic, social and tourism impacts host business tourism events of many cities and countries (Rogerson, 2005:179). Evidence of this can be seen in the many conventions, exhibitions, and purposefully built facilities that have sprung up over the past few decades in major cities, capitals and resort areas (Tansakul, 2007:1). Being one of the most recognised sub-sectors of the business tourism sector, exhibitions play a significant role in maximising positive economic, social and tourism impacts (Rogerson, 2005:179). It is thus the responsibility of exhibition managers to not only adapt to and study their macro-environments but to also plan towards maximising economic, social and touristic outcomes. As mentioned in the previous section, planning requires setting clear goals and objectives as guidelines towards achieving the necessary outcomes. Both the outcomes of the event organisers and those of the visitors need to be taken into consideration during the planning phase. This is evident by Bowdin *et al.'s* (2012:27) statement that both demand- and supply-side aspects need to be considered when planning exhibitions. Managing both sides are key to hosting thriving events in well-structured industries such as exhibitions (Bowdin *et al.,* 2012:27). Therefore, to understand what is meant by the demand and supply aspects of exhibitions, the following section provides an overview of previous research done in this field.

3.4.3. Previous research: Exhibition demand and supply

A demand and supply analysis is a fundamental subject in microeconomics (Eastin & Arbogast, 2011:2). It serves as a planning tool to analyse the feasibility of future service, commodity or in this case an event based on a systematic study of existing historical data (Abou-Moghli & Al-Abdallah, 2012:96). This data includes how buyers and sellers interact to determine transaction prices and quantities (Eastin & Arbogast, 2011:2). Studies done that contribute to demand and supply data on events include research on consumer behaviour and motives (see Abou-Moghli & Al-Abdallah, 2012:96) and success factors that create memorable experiences or product offerings (see Manners, Saayman *et al*., 2015:4).

In 2012, Gottlieb *et al*. (2012:91) conducted a literature review on trade shows and consumer shows, which identified that most studies on trade show effectiveness covered organisers and exhibitors, with limited research focussing on visitor perceptions. Tafesse and Skallerud (2017:20) found that between 1980 and 2014, only 4% of articles (from 91

articles) studied the organisational mode (supply side), 16% the visitor mode (demand side) and 66% the exhibitor mode in journals that contained trade-show articles. Firstly, the exhibitor mode and most popular area of research involves the participant. The participants of trade shows are those who set up physical exhibits, display products and who have face-to-face contact with potential customers (Gopalakrishna & Lilien, 1995:26; Tafesse & Skallerud, 2017:20). Secondly, the organising mode represents the managing of trade-show events, which involves planning and implementing various creative, marketing and logistical activities (Dawson, Young, Tu & Chongyi, 2014:496; Tafesse & Skallerud, 2017:20). Seeing that the organising mode is an important focus point of this study, as it represents the supply side, it is important to identify the factors that are key to its success. Therefore, a summary is compiled of some previous research performed on trade shows from an organisational perspective, as presented in Table 3.6.

Table 3.6: Previous research on trade shows as viewed from an organisational perspective

Authors	Title	Focus area	Success factors identified: supply-side
Kerin and Cron (1987)	Assessing trade show functions and performance: An exploratory study	Identify marketing strategy-related variables that affect the performance of trade shows, including important factors for managing trade shows	• Disseminate more information to the marked place when a greater variety of product offerings exists • Identify marketing- and trade-show variables • Write down trade-show objectives • Identify visitor characteristics and the type of event being hosted • Appropriate event evaluation procedures and measures • Identify trade-show spending decisions
Tafesse and Korneliussen (2012)	Managing trade show campaigns: why managerial responsibilities matter?	Identifying multiple, task-managerial responsibility linkages in business to business trade shows	• Match trade-show tasks with appropriate management levels • Top managers should focus more on strategic efforts such resource allocation while middle and lower management should focus on implementation • Leave the selection, planning, and implementation of specific trade show campaigns to middle and lower-level decision makers • Prioritise market and geographic importance
Kirchgeorg, Jung and Klante (2010)	The future of trade shows: insights from a scenario analysis	Identify factors that shape the future of trade shows as a marketing instrument as well as strategic decisions made by trade show organisers to respond to future challenges	• Trade show companies must move away from the selling space towards becoming information brokers facilitating networking and market interaction • Focus on offering a broad range of high-level services • Determine own activities without excessive government interference

			• Personal contact between decision-makers, companies, and customers in an attractive and emotionalised setting • Provide efficiently and involve settings on industry-relevant themes
Tafesse (2014)	Understanding how resource deployment strategies influence trade show organisers' performance effectiveness	Examining how resource deployment strategies influence trade-show organisers' performance effectiveness from an organiser's perspective	• Market-based resources are instrumental to trade-show management, notably consisting of: o reputational (trade show longevity), o customer linking (industry association support, webpage interactivity) and o physical resources (exhibition duration and exhibition area) • Increase exhibitor numbers by highlighting the longevity of their show in promotional and interfacing works • Leverage industry association support to boost the number of exhibitors • Improve the interactivity of webpage for effective information exchange • Increase the number of exhibitors and visitors by increasing show duration and floor space

Source: Researcher's own compilation

An evaluation of Table 3.6 reveals that corresponding key factors for hosting trade shows and exhibitions involve disseminating information, gathering market information (behaviour and characteristics), setting goals and objectives, planning shows, appropriating task and resource allocation, linking customers with exhibitors (personal contact), appropriating venue and setting, keeping with industry theme, providing a broad range of exhibitors and activities and providing networking opportunities.

Lastly, the visitor mode represents potential buyers that visit trade shows (Godar & O'Connor, 2001:77). Potential buyers to trade shows come to evaluate potential suppliers and may gather information, build network connections and examine product offerings (Godar & O'Connor, 2001:77). Visitors or potential buyers represent the demand side of events and due to their relevance to the study, a literature review was performed to analyse some of the demand aspects found in research studies covering trade shows and exhibitions (Table 3.7). The review provides but a handful of studies on the visitor mode to MICE events and does not represent all available studies on the topic.

Table 3.7: Previous research on trade shows, exhibitions, and expositions from the visitor perspective

Authors	Title	Focus area	Demand-side aspects
Blythe (1999)	Visitor and exhibitor expectations and outcomes at trade exhibitions	Expectations of exhibitors at trade shows as well as visitor expectation at trade exhibitions	Reasons for attending • To see new products and developments • To obtain technical or product information • To gather up-to-date information on legislation • To try new products and demonstrations • To see new companies • To see a specific company or product • To make business contacts
Godar and O'Connor (2001)	Same Time Next Year - Buyer Trade Show Motives	Buyer (business buyers) motives for attending trade shows	Buyer-trade show motives • To become educated and make potential purchases. • To educate themselves on various aspects (trends and product info) • To support the industry, company or product. • To network in a web of interactions that includes other buyers, influencer, and the seller/exhibitor.
Lee, Yeung and Dewald (2010)	An exploratory study examining the determinants of attendance motivations as perceived by attendees at Hong Kong exhibitions.	Exhibition Attendance Motivators	Exhibition Attendance Motivators • Information search o To see new products and developments o To keep abreast of current technologies o To see new companies o To be up-to-date on new technologies and offerings • Market investigation o To compare products o To try new products o To investigate alternatives • Networking opportunity o To build insights into the industry • Fulfilment of business needs o To see a specific product or service o To establish business contracts
Kruger, Saayman and Ellis (2014)	The influence of travel motives on visitor happiness attending a wedding expo	Motives for attending a wedding expo	Event attributes/attractiveness • To gain new ideas on trends • To compare prices • To explore the many exhibitors, • To inspire creativity • To apply personal preferences • To explore wedding planning aspects

			• To awaken my curiosity • To learn about new things Enhancement of kinship/relationship • To spend time with someone special • To build stronger relationships • To relax • To have a fun experience • The benefit of travelling in a group • Because it is exciting
Chung, Koo and Kim (2014)	Extrinsic and intrinsic motivation for using a booth recommender system service on exhibition attendees' unplanned visit behaviour	Unplanned booth visit behaviour regarding extrinsic and intrinsic motivation drivers to conventions and exhibitions	Extrinsic motivation • Information gain o To inquire about task-related expert information o To obtain a new product and information o To acquire a new idea o To increase my knowledge o To meet an expert Intrinsic motivation • Escape o To relieve daily stress o To relieve boredom o To escape from routine life o For a change of pace from everyday life o Getting a change from a busy job • Event attractions o To enjoy a unique atmosphere o To see new and different things
Wei and Lin (2015)	Factors impacting trade and public visitors' satisfaction in food-related exhibitions in Taiwan	Examine visitor perceptions on the performances of exhibitions and identify the attributes that influence trade at exhibitions	Purpose of attending exhibition • Collecting information • Socialise • Procurement opportunity • Exploring market trends Performance of exhibition service quality • Booth content • Exhibition content • Promotion mix • Services • Layout and signage • Functionality

Source: Researcher's own compilation

When evaluation the demand-side aspects mentioned in Table 3.7, it is revealed that information gathering (to be educated, increase knowledge and compare products/services), having contact with exhibitors (face-to-face), networking opportunities, having a good variety

of exhibits and a suitable venue that contributes to the atmosphere and functionality of the event all are important reasons for visiting trade shows. These aspects in particular also correspond to the success factors identified for hosting trade shows and exhibitions. Moreover, other factors mentioned for visiting trade shows and exhibitions included: to escape from daily routine, to relax, to have fun, to socialise, to do something novel, to be inspired creatively, to get updated on the newest trends and technologies and to test new technologies. Hence, for an event or exhibit manager it is important to host theme-appropriate exhibitions at suitable venues that can accommodate networking, interaction and knowledge creation, and present a fun, relaxing and sociable platform for buyers and sellers to meet.

Despite the above results, 'academic research still struggles to answer the most basic questions: why organise, exhibit at, and visit trade shows?' (Tafesse & Skallerud, 2017:19). This is particularly true when it comes to expositions, with only a handful found that focussed on visitor motives to attend expositions (see Kruger *et al*., 2014:654-655 Lee, Kang & Lee, 2013:654; Lee, Lee & Wicks, 2004:69) and even less that focussed on why organisers supply them (Tafesse & Skallerud, 2017:19). Evidence of this can be seen in the lack of research done on video gaming events such as the rAge Expo in Johannesburg, LANX Gaming and Expo Event in Pretoria and the Electronic & Gaming Expo (EGE) in Cape Town. The same applies to international expositions, exhibitions and trade shows such as Gamescom in Köln, Germany, BlizzCon in Anaheim, California, Game Developers Conference in San Francisco California and the Electronic Entertainment Expo (E3) in Los Angeles, California. Most research done at these events usually only involves attendance, exhibitor and games showcased numbers.

Numbers and figures may show how popular an event is but do not justify the reasons why. Research on why exhibitions are hosted and attended can provide one with a better understanding of how they benefit these parties. There would be little motive in the way of attending or hosting an event if it does not contribute to anything. To have a better grasp on the benefits of hosting exhibitions and one that is a deciding factor in their demand and supply, the following section will discuss the benefits thereof.

3.4.4. Benefits of hosting exhibitions

'Many cities would like to develop MICE because of the benefits MICE bring to a city.' (Lau, 2016:11). 'Meetings' also represents a collective meaning for the MICE industry due to the widely held view that all MICE activities provide opportunities to meet (TCEB, 2014:5). The World Tourism Organization (UNWTO, 2006:4) has defined the meetings sector to include:

> …activities based on the organisation, promotion, sales and delivery of meetings and events; products and services that include corporate, association and government meetings, corporate incentives, seminars, congresses, conferences, conventions events, exhibitions, and fairs.

The definition provided is also used in conjunction with defining the MICE sector (UNWTO, 2006:4). The meetings industry can have immense positive impacts on the broader economy (UNWTO, 2014:10). UNTWO (2014:10) proffers several other reasons for why the meetings industry is essential and the benefits thereof, including that it:

- plays an important role in supporting other businesses,
- promotes investment, trade, communications, and technology,
- brings education and professional development to the local community,
- creates job opportunities and retains work forces,
- promotes and supports other business sectors,
- attracts global expertise
- creates and spreads knowledge,
- builds community profiles,
- promotes and supports other business sectors, and
- promotes global understanding and cooperation.

As a valuable contributor to the meetings/MICE industry, exhibitions and expositions play an essential part in promoting these mentioned benefits (see Lau, 2016:11). Additionally, exhibitions and expositions can directly benefit the hosting organisation, its exhibitors and attendees, as well as the hosting destination. Firstly, an organisational perspective may see hosting exhibitions as a means of making a profit (Manners *et al*., 2016:156). Exhibitors may seek them for similar reasons or as an opportunity to create brand awareness or use them as a tool for advertising amongst a target market (Queensland Government, 2017:internet). Exhibitions also provide exhibitors with a marketplace to meet new buyers, to be educated on trends, to gather new inspiration, and to get regulatory updates on issues that could impact future business (JPMA [The Juvenile Products Manufacturers Association] Show, 2017:internet). As for exhibition visitors or attendees, reasons may differ based on the type of visitor attendance. To evaluate potential suppliers, gather information on competitors and build networking is usually particular to the business visitor or buyer (Godar & O'Connor, 2001:77). The general public or the consumer visitors, however, may seek such events to socialise, compare prices, catch up on trends, be entertained and/or to learn about new things (Kruger *et al*., 2014:654; Lee *et al*., 2013:654).

At the same time exhibitions could provide destination-specific benefits such as creating temporary or permanent jobs, improving local infrastructure (purpose-built facilities and their maintenance) and increasing local and international tourism to the area (Getz, 2008:407). As a result of increased tourism and spending, exhibitions could directly and indirectly benefit restaurants (local culinary industry), hotels (local accommodation industry), car rental agencies (local transportation industry) and other businesses (local retail industry) (The New York Times, 2013:internet). Knowledge of the impact that exhibitions can have on the brand of a city could aid in planning a city's branding activities such as those assets and attributes that give it its unique proposition (Kowalik, 2012:630). If a city has a strong brand or image it could positively shape the way citizens, visitors and businesses respond to it (Kotler & Gertner, 2002:251).

Unfortunately, the benefits of exhibitions, trade shows and trade fairs in the regions in which they take place are often underestimated (Beier & Damböck, 2011:33-34). At the same time, due to increased globalisation, the infrastructure, quality of life and amenities in many large cities have become alike, increasing the need for them to differentiate (Richards & Wilson, 2004:1931). Understanding the impact of such events and their recurring influence on a destination can aid in their expansion and on-going support. Examples of such support can be seen when exhibition events are included in a city's development strategy (Kowalik, 2012:636-637). Lublin in Poland is an example of a city that includes fairs in the city development strategy as an element of competitive advantage and future development direction (Kowalik, 2012:637). Kielce is another city in Poland that positions fairs and trade shows with industries in line with the strategic goals of the city (City Council of Kielce, 2015:22-23). Tourist-popular cities such as Dubai have also understood the impact of such events and has used exhibitions as a strategic development plan aimed at creating jobs improving citizen quality of life and positively transforming a city's image (Jain, 2012:internet). In South Africa, the Cape Town International Convention Centre (CTICC) has positioned itself as hosting the highest number of international association conferences in Africa (Meetings Africa, 2017:4). The convention centre has been used as an instrumental driver for spurring economic growth, job creation and transforming the economy and landscape of Cape Town (Cape Town Government, 2014:2). The city of Johannesburg and province of Gauging as a whole, however, are considered the epicentre of South Africa's business events (MICE) and meetings industry, offering world-class venues and infrastructure for meetings, incentives, conferences, exhibitions and events (Meetings Africa, 2017:8). To further examine the exhibition landscapes in South Africa, see the following section as it provides information on the MICE industry and previous research done on exhibitions.

3.4.5. Exhibitions in South Africa and previous research

In South Africa, the MICE sector has contributed and is continuing to contribute significantly to the continued growth of the national tourism industry (Fenich *et al*., 2012:40). In 2009, business tourism represented 4.7% of all international tourist arrivals, of which 500 000 tourists engaged in MICE activities (Van Schalkwyk, 2011:1). The total economic value of MICE tourism in South Africa for the year was estimated at R4 billion (Van Schalkwyk, 2011:1). In 2015, however, the direct spending of business tourists in South Africa was estimated at R42.4 billion (Hanekom, 2017:internet). It was also estimated that South Africa's MICE sector supported roughly 280 000 direct and indirect jobs that year (Hanekom, 2017:internet).

In 2018, EventsEye's (2017:internet), 'directory of Trade Fairs, Conferences & Trade Shows Worldwide with a comprehensive Trade Show Classification', identified almost 100 trade shows, exhibitions, expos, and fairs to take place in South Africa in 2018 and 2019. The list provided by the website was primarily limited to trade-related events, and excluded many other business-to-consumer, business-to-business, and mixed shows. A list by 10Times (2018:internet), the 'world's largest business event platform', revealed more than 180 trade shows to take place in South Africa in 2017 and 2018. Interestingly enough, many local video gaming expositions are excluded in the list, such as Con.ect (Port Elizabeth's Geek Convention), Canal Walk's Gaming Expo, Capegate Tech & Gaming Expo, Geekon, Rush (esports-focused Expo), LanX (gaming and Expo event), ICON (comics and games convention), GeekFest, and FanCon (see Zombiegamer, 2017:internet). Furthermore, the lists seem insignificantly small compared to the almost 2 000 exhibitions that are held annually in South Africa as identified by Siyabona Africa (2017:internet). The lack of a comprehensive list of available trade shows, exhibition and expositions only shows that the South African MICE industry may be much more significant than anticipated.

In contrast to the size, scope, and availability of MICE events today, many of South Africa's first event organisations, dating back to the 1960s, started relatively small and focused on organising conferences (Tassiopoulos, 2005b:2). It was not until after 1994 that the country saw record numbers in annual tourist arrivals (Fenich *et al*., 2012:40). The abolishment of Apartheid (separate development of the different racial groups) resulted in a surge of business travellers to the country and as such is considered a landmark date for South Africa's growing MICE sector (Tassiopoulos, as cited by Fenich *et al.,* 2012:40). The MICE continues to play an essential part in developing urban tourism in South Africa (Rogerson & Visser, 2005:63).

Traditionally, the MICE sector relied on tourism infrastructure associated with hotels and game lodges for hosting events (Fenich *et al*., 2012:41). Today, however, many large multi-purpose venues are built and used in major cities to promote business tourism (Fenich *et al*., 2012:41). As of 2017, there are more than 1 700 conferences, exhibition and international convention venues in the country (South African National Convention Bureau [SANCB], 2017:internet). One such venue is the Ticketpro Dome in northern Johannesburg (Randburg) South Africa. This is a large, urban, multi-purpose venue used for hosting a significant number of events annually ranging from live music concerts, trade shows, food and wine shows, to hobby expositions/exhibitions such as the rAge Expo (Ticketpro Dome, 2017:internet). The Wedding Expo is another exposition that is held at this venue and one which has received academic interest.

In 2012, Kruger *et al*. (2014:652) surveyed the Wedding Expo to determine the influence of travel motives on visitor happiness attending the Expo. They found that event attributes/attractiveness, enhancement of kinship/relationships, and event novelty to be the most important reasons for visiting the event. Based on their findings, Kruger *et al.* (2014:661) suggested that management should focus on these motivational aspects when marketing future Wedding Expos. Other research on exhibitions and expositions in South Africa includes those industry and research reports compiled by the tourism research unit of North-West University, Tourism Research in Economics, Environs and Society (TREES, 2012; 2013a, 2013b; 2015; 2016a; 2016b). These reports mainly focus on socio-demographic profiles, economic information, attendance motives and spending behaviours of visitors to expositions and trade shows such as the Wedding Expo, HuntEx, and Decorex Expo in Johannesburg and the Good Food and Wine Show in Cape Town. Unfortunately, many of these reports are not made publically available and are only available to those event organisers. This accords with Reynolds' (2008:77) remark that the operational knowledge of exhibitions, as a marketing medium/tourism driver, is mostly restricted to those working in the exhibition industry.

Concerning locally available research on exhibitions, expositions, conventions, trade shows and fairs, see the works of Fenich *et al*. (2012), Mbowane, De Villiers and Braun (2017), McCoy and Du Plessis (2000), Ngcoza, Sewry, Chikunda and Kahenge (2016) and Reynolds (2008). Fenich *et al*.'s (2012) research focused on a framework for developing qualifications in the meetings, expositions, events, and conventions industry in South Africa. Mbowane *et al*. (2017:76) focussed on teacher participation in science fairs, which have shown that science fairs provide teachers with opportunities for networking, exchanging knowledge and growth in professional identity. Ngcoza *et al*. (2016:197) examined science

events whereby it was revealed that coordinators motivate learners to participate in science expos because it can promote long-term interest in science, provide opportunities to meet other learners, gain ideas for projects and offer chances to win various prizes. McCoy and Du Plessis (2000:468) found that exhibitions play an important role in the marketing mix of businesses in South Africa and that exhibitions are a powerful sales tool for penetrating new markets. Reynolds' (2008:77) study on 'The significance of the business tourism sector in South Africa: the role of exhibitions' identified that exhibitions are a key component of growing business tourism in South Africa. Reynolds (2008:77) also noted that little academic research exists in this field in South Africa. Likewise, Rogerson (2005:177) stated that the 'developing world as a whole had been a limited focus for research on business tourism, not least the continent of Africa, which has received no scholarly attention'. Swarbrooke and Horner (2001:11) also raised similar concern back in 2001 by stating that there is a general lack of literature and reliable statistics in the field of business tourism. To recognise the value of business tourism, it is necessary to develop an understanding of the inner workings of the industry through research (Reynolds, 2008:2).

3.5. Conclusion

It is evident from the chapter that events are essential motivators for tourism. They hold the potential of improving a destination's image and bringing about social and economic benefits. Planned events, in particular, are hosted for the purpose of creating destination value or as an important strategy to achieve social, economic, business and/or environmental goals. To obtain these goals without the risk of running into costs greater than its benefits, many planned events are organised by event professionals. Event management is seen as that which is performed by professionals accountable for achieving such goals and objectives. They do this by balancing and responding to the needs of the event (event management and organisation, suppliers and buyers, exhibitors and retailers, performers and artists, products and services, and theme and design), the sponsors and the audience/visitors and community. Their operational responsibilities also include planning, organising, marketing and hosting planned events. Research concerning supply- and demand-side options is integral with the planning and operation system (Billinton & Lakhanpal, 1996:225).

Unfortunately, limited research has been done on supply- and demand-side options concerning MICE tourism in South Africa, with MICE being planned business tourism events. This limitation of research also extends to local studies done on exhibitions – an overarching term used for planned events including expositions, trade shows and trade fairs. A literature

gap on both sides is disturbing as it serves as a valuable resource for planning and growing thriving events, particularly on evolving industries such as the video gaming industry.

Fortunately, this chapter served as a literature analysis of research that has been done on exhibitions, in addition to identifying important demand- and supply-side aspects. Demand-side aspects identified as being important motivators for attending exhibitions included: to have fun, relax, socialise, gather information, doing something novel, getting updated on trends, having contact with exhibits and exhibitors. Those identified for hosting thriving events included: keeping with the industry theme, having a variety of exhibits, having a suitable venue, information dissemination, gathering market information, setting goals and objectives, event planning, appropriate task and resource allocation, linking customers with exhibitors, and providing networking opportunities. These aspects are but a few examples of information uncovered in this chapter that assisted in constructing relevant questions for the visitors survey done at the 2016 rAge Expo in Johannesburg, and in constructing interview questions aimed at video gaming event organisers. Information gathered from the surveys and interviews, in combination with this chapter, aid in narrowing some of the research gaps found on exhibitions. More particularly, the visitor survey and organiser interviews provide information on video gaming exhibitions in South Africa from both a demand- and supply-side perspective.

With all that has been said about current exhibition research in South Africa, little research in general has gone into studying video gaming events or exhibitions, not to mention South Africa's video gaming industry. As such, the following chapter aims to shed light on the video gaming industry and specifically that of South Africa.

Chapter 4: A literature analysis of the video gaming industry

4.1. Introduction

Video games form an integral part of entertainment, with audiences estimated at between 2.2 and 2.6 billion people worldwide (The UK Interactive Entertainment Association [Ukie], 2016:internet). As a result of advances in technological entertainment and a growing consumer base, the video gaming industry – including gaming hardware, software, and services – has become one of the most profitable technology markets to date (Dey & Lahiri, 2016:546). It is a market that has shown substantial growth over the past few years, from US$20 billion in 2001 to over US$100 billion in 2016 (Dey & Lahiri, 2016:547). In 2016, the global market was estimated to be worth US$101.1 billion and is expected to grow to US$128.5 billion by the end of 2020 (Ukie, 2016:internet). This is very plausible and could even exceed expectations as the market is already projected to reach $108.9 billion in game revenues in 2017 (Newzoo, 2017a:internet).

Besides being a powerhouse of the entertainment industry, the video-game industry is also believed to have experienced the highest level of creative industry growth since its emergence back in the early 1970s (Cabras, Goumagias, Fernandes, Cowling, Li, Kudenko, Devlin & Nucciarelli, 2017:305). Going beyond the creative industries, South Africa's video gaming industry is projected to be the fastest growing industry in the country (Big Fish Games, 2017:internet). Presently, video gaming is already the fastest growing segment of the South Africa's media market and is predicted to keep growing at a steady rate of 10% each year (Mcilhone, 2015:internet). At its current growth rate, the industry is expected to reach R3.6 billion by 2018 and is a direct result of increased access to new technology (mobile devices and consoles) and the internet (Big Fish Games, 2017:internet). 'Consumer demand for technology that adapts to their needs and expectations is regarded as the driving force behind the increase in sales…' (Mcilhone, 2015:internet).

Unfortunately, little is known of South Africa's video gaming industry or its consumer-base, besides some sales and revenue figures and projections in reports by Big Fish Games (2017:internet), Newzoo (2017b:internet, 2017c:internet), PricewaterhouseCoopers (PwC, 2016:36-37), Statista (2017:internet), and developer figures by Make Games South Africa (MGSA, 2015:internet). Similar limitations can be found in the video gaming industry in general. For example, Granic, Lobel and Engels (2014:67) stated that little research has focused on the benefits of playing video games, while Cabras *et al*. (2017:305) identified that the number of studies analysing the video-game industry and its impact on economic systems remain relatively low. Many previous studies on video games, particularly in the

field of problematic gaming and psychosocial well-being, has also overlooked person-level factors such as reasons for using games, differences in personality traits, demographic characteristics and social factors associated with different games (Carras *et al.,* 2017:474). Similarly, Lee, Clarke and Rossi (2016:833) noted that little research exists on how gamers and other stakeholders select, acquire and play video games. Another obstacle facing video gaming industry research is the rapid evolution of media and information technologies, as well as changes to its object as it can cause research to become quickly out of date (Rebetez & Betrancourt, 2007:132). These changes include the evolution of text-based adventure games to next generation high-definition first-person shooters, penny arcade video games to personal console and home computer experiences, and the move to more mobile-augmented reality and virtual reality gaming (Rebetez & Betrancourt, 2007:132).

With an industry that is rapidly evolving and growing, it is unfortunate to see that a lack of understanding still clouds the topic of video gaming. However, as a result of online media space popularity, most of that which has been done on video gaming-related topics and statistics are confined to online news (see Bloomburg Technology, 2017; Chalmette, 2017; Dassanayake, 2017), reports (see Big Fish Games, 2013, 2017; Business Insights, 2009; Entertainment Software Association [ESA], 2015, 2016; Germany Trade & Invest [GTAI], 2017) and articles (Leadbetter, 2017; Melanson, 2006; Polygon, 2013). Thus, many of the sources in this chapter will be based on internet source material since little academic and publication research exists on video gaming in general (see Clarke, Lee & Rossi, 2015:834; Crawford, 2011:57; Granic *et al*., 2014:67; Griffiths, 1999:203; Lee *et al*., 2016:833; Redmond, 2010:2; Schrier, 2010:28).

Hence, with the aim of providing a more comprehensive overview of the video gaming industry, this chapter serves as an analysis of the video gaming industry, its evolution/history of games, the game development process, the video-game value chain, gaming trends, challenges and benefits, and the gaming behaviours and motives of its consumers. Lastly, in this chapter, an overview is provided of the research performed and industry reports compiled on video gaming in South Africa. In doing so, this chapter serves to provide insight on the subject matter, as well as to identify the research gaps surrounding South Africa's video gaming market and that of video gaming in general.

4.2. The video-game industry

The video-game industry constitutes the development, publishing, manufacturing, distribution and selling of electronic gaming devices, software, and accessories (Langlotz, Rode & Whaley, 2008:6). In the past, or traditionally, the video-game industry was referred

to as gaming on ‘raster’ display devices (dot matrix data structure representing a rectangular grid of pixels), but due to evolving technological advancements and 3D polygon imagery it is now referred to as gaming on any type of display device (Langlotz *et al*., 2008:6; Lysenko, 2007:5-9). The evolution of display devices has enabled the advancement of different platform technologies, previously dominated by television sets and now includes many new devices that can display video signals such as tablets, monitors, cellular phones, virtual reality headsets, dedicated handheld gaming devices (3DS) and other handheld devices (Langlotz *et al*., 2008:6). All these devices can be identified or categorised as the hardware side of the video gaming industry since they represent the physical devices on which video games are played. Deciding on a platform or platforms can largely depend on the availability of games on said hardware (Binken & Stremersch, 2009:88). For playing video games one would require a video-game device (platforms and accompanying peripherals) and a video game; thus two products having complementary and interdependent properties are needed for playing video games (Binken & Stremersch, 2009:88). To assist in understanding the industry and its components, Figure 4.1 illustrates a visual presentation of the video gaming industry.

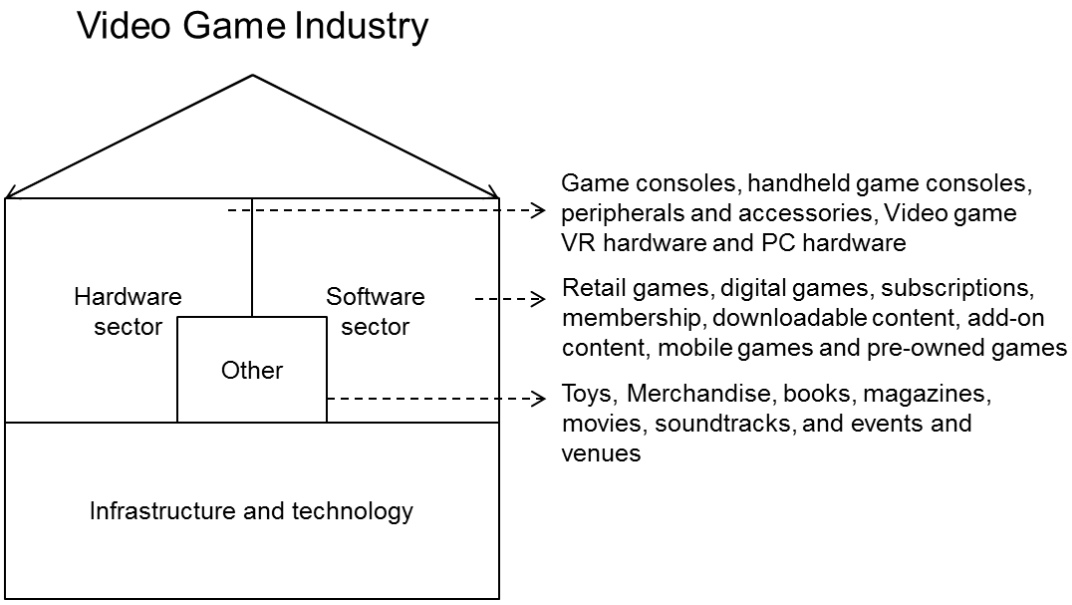

Figure 4.1: The video-game industry

Source: Adapted from Langlotz *et al.* (2008:6) and Ukie (2017:internet)

As shown in Figure 4.1, the conjunctional use of video games and their platform devices, segments the video gaming industry into two sectors, namely the hardware sector and the software sector (Daidj, 2015:269). The hardware sector consists of gaming consoles (PS4, Xbox One etc.), handheld gaming consoles (3DS, Nintendo Switch etc.) and accompanying

gaming accessories/peripherals (remotes, controllers, VR etc.), while the software sectors include retail game sales and digital sales such as subscriptions, memberships, downloadable content, add-on content, mobile games and digital games (Hollingworth, 2014:internet; Morris, 2015:internet). The consoles scope of the video-game industry includes consoles and handheld consoles (hardware), console games (software) and accessories (virtual and physical), while the same goes for the personal computer (PC) gaming scope (Chalmette, 2017:5). As for the handheld scope (tablets, cell phones and mobile devices excluding dedicated gaming handheld devices), revenue values are limited to software sales (Chalmette, 2017:5).

A third sector can also be identified as a necessity for a flourishing video gaming industry, and this is the infrastructure and technology sector (Langlotz *et al*., 2008:6). Although the infrastructure and technology sector is not financially measured in conjunction with the video gaming industry, it however 'encompasses the support necessary to distribute the improved technology offerings needed for playing the games' (Langlotz *et al*., 2008:6). The sector includes elements such as access to online, broadband, and high-speed internet (Langlotz *et al*., 2008:6). What is more, the infrastructure and technology sector influences the technology behind the video gaming software and hardware sector (Langlotz *et al*., 2008:6), the development process (Stevegames, 2012:internet) and distribution process/value chain (González-Piñero & Soto, 2017:28).

In addition, although software and hardware sales are the most preferred way of determining the video gaming industry's size, the United Kingdom's (UK) video gaming industry went beyond this traditional route and included gaming-related toys and merchandise, books and magazines, movies and soundtracks as well as events and venues as part of their consumer spending total (Ukie, 2017:internet). Video gaming events and venues in the UK contributed £7.5 million in 2016 which is 20.6% higher than the previous year with a consumer spending of £6.2 million (Ukie, 2017:internet). In total, the UK gaming industry's total 2016's consumer spending was estimated at £4.33 billion (Ukie, 2017:internet).

So why care about events such as these if they merely scrape the surface of the greater video gaming industry? Well for one, events such as these can bring 'together representatives of every link in the industry's value chain, from developers and publishers to retailers and consumers, and creates forums for discussion at every level' (Bundesverband Interaktive Unterhaltungssoftware [BIU], 2017:25). The second reason is that it is a growing sector of the video gaming industry (Ukie, 2017:internet). Thirdly, it provides business opportunities for exhibitors, trade professionals, and the media, as well as a unique

entertainment experience for consumers (BIU, 2017:25). Fourthly and on the topic of this research study, such events can attract large numbers of people both nationally and internationally. Take, for example, the Gamescom video gaming event in Germany which attracts over 345,000 people from 97 countries (BIU, 2017:25). According to Gerald Böse, CEO of Koelnmesse Gesellschaft mit beschränkter Haftung (GmbH), '[g]amescom is the most important business platform for the European computer and video-game industry' (BIU, 2017:25). Böse also stated that the event grew by 9% from 2015 to 2016 and also attracted more international exhibitors than in previous years (BIU, 2017:25).

It is therefore evident that the video gaming industry goes beyond software and hardware sales and that other sectors (information, technology and events) within the industry can play a vital role in its success. However, like many evolving industries, video gaming did not just suddenly gain instant success. To have reached its current status and dominance in the entertainment industry it must have started somewhere or for some reason. Understanding this past and history can help pave the way towards understanding its future growth and as such is the topic of the following section.

4.3. The evolution of the video games Industry

> From the laboratory to arcades and, later, onto shelves and into the cloud, video games have rapidly and radically evolved in the past half century (Epstein, 2014:internet).

With this citation in mind, the following section serves to provide a brief history of the origins and evolution of the video gaming industry, its current state and what its future holds, starting with the definition of video games

4.3.1. Defining video games

Before starting with the origins, it is important to firstly understand what is included in the definition of a video game. At its base, the definition of a game can be derived from two perspectives, namely having a humanistic perspective and a mathematical perspective (González-Piñero & Soto, 2017:8). In game theory, the humanistic theory is the most common approach and is defined by Huizinga (1949:27) as:

> ...free action performed 'what if' and is felt as lying outside of everyday life. It can completely absorb the player, without any material interest or advantage, and runs within a certain time and a certain space. It takes place in a specific order subject to rules and gives rise to associations which tend to surround themselves with mystery or disguise and stand out from the usual world.

As a representative of the mathematical perspective, Von Neumann and Morgenstern (1944:49) defined a game as simply being ‘the totality of rules that describe it', including ‘all forms in which it is used are understood for playing’. The moves within a game represent the alternative set of choices players can make within the boundaries of game rules and embodies the strategies that govern the outcome of each player, while a breach of game rules stops the game (Von Neumann & Morgenstern, 1944:49).

The afore-mentioned thus leads to the question - but where does this leave video games? First of all, video games can be played on many different platforms and have many different experiences. Because of this, it is very difficult to exactly define a video-game or have a unified definition or theory for defining a video-game (Rodríguez, 2002:12). Fortunately video games do poses characteristics from the afore-mentioned game perspectives, together with some fundamental areas theorists in video gaming agree upon (González-Piñero & Soto, 2017:8). The first being that video games are interactive as identified by the following definitions:

> Interactive animated images accompanied by an environmental sound and an Interface (Clais & Dubois, 2011:16).
>
> ...an electronic or computerised game played by manipulating images on a video display or television screen (Bogdanowicz, De Prato, Nepelski, Simon & Lusoli, 2010:17).

Secondly, video games take place in a computerised environment or contain computerised elements and thirdly that it is governed by rules and objectives such as seen in the following definitions:

> It is an enveloping activity with a specific goal, in a micro-world controlled by relatively simple and clear norms (Darley 2000:164).
>
> A game consists of a computing environment on a screen whose rules have been previously programmed (Levis, 1997:27).

Rules and objective within video games correspond with elements of the mathematical theory of a game (González-Piñero & Soto, 2017:9), while the humanistic perspective of absorbing a players attention (fourth concept) corresponds with Crawford’s (1982:8) definition of a video game. In Crawford’s (1982:8) definition, a video-game is an ‘artistic representation of a phenomenon’ and ‘the designer simplifies this phenomenon deliberately to focus the player’s attention on those important factors.’ By combining all the definitions outlined above, a video-game can be defined as an interactive and computerised experience

governed by rules and objectives where a person's attention is absorbed in a situation where there is a disregard for the realism of the situation.

To understand how the concept *video games* has evolved over the years, see the following sections for an examination of its origins, history and present.

4.3.2. Origins of video games

The origins of video games date back to the late 1940s when Thomas T Goldsmith Jr and Estle Ray Mann designed a simulation, also argued as being the first game, to be played on a Cathode Ray Tube (CRT) (Inimaginable, 2017:internet). The idea behind the simulation was inspired by radar displays used in World War II and simulated a missile being fired at a target where several knobs were used to adjust the curve and speed (Likhachev, 2011:13). At the time, small targets drawn on a simple overlay were placed on the CRT since no graphics could be drawn electronically (Inimaginable, 2017:internet).

In 1951 Nimrod, the Nim-playing digital computer, was developed by the British computer company Ferranti (Jørgensen, 2007:284). This was the first computer for games, and more specifically it played the 'Nim' game (Fritts, 2013:5). Nim being a strategic mathematical game involved:

> Initially we have any number of heaps, each containing any number of tokens (usually matches). In the simplest form, two contestants play alternately and may pick up as many matches as they wish at one time from one pile, but they must take at least one match. The aim is to avoid taking the last match of all. (Bowden, 1953:304)

Although Nimrod computer was the first computer for games, the first game to run on computers in general was checkers in 1951 and 'OXO' (a tic-tac-toe game) in 1952 (Fritts, 2013:5).

Alternatively, Hadzinsky (2014:3) argues that although the Cathode Ray Tube amusement device and the Nimrod computer merely flirted with the idea of video games, the birth of video games as they are known today started some years later. According to Rabin (2005:4), the first true video-game can be attributed to William Higinbotham, the head of the Instrumentation Division for Brookhaven National Laboratory and prior employee on the Manhattans Project. In 1958, at the annual visitor's day at Brookhaven, Higinbotham had a brainstorm and thought it interesting to have an interactive display as people were not interested in the static exhibitions of previous visitor days (Rabin, 2005:4). In a matter of

three weeks, William, together with Robert V Dvorak, a technical specialist developed 'the very first video game' (Rabin, 2005:4). The game was called 'Tennis for Two' and ran on an analogy computer hooked up to an oscilloscope. Unlike 'Pong', the table tennis sports game, this game was played from a side-way perspective and not a top-down view (Rabin, 2005:4).

In 1951 Ralph Baer, a television engineer at Loral, had the idea of adding an interactive game to a television to set it apart from its competitors (Likhachev, 2011:14). At the time the idea seemed unfathomable and got rejected by Barres's boss (Langlotz *et al.,* 2008:8; Likhachev, 2011:14). Fifteen years later, however, he rekindled this idea for a secondary use of a television and started working with his engineers on the development of a game (Langlotz *et al.,* 2008:8). The name of the game was the Chase Game (Hadzinsky, 2014:4). A year later (1967) Baer and his team of engineers developed the first video-game console to be used with a television set (Herman, Horwitz, Kent, & Miller, 2002:internet). The console was a bulky rectangular brown wooden box, also referred to as the 'Brown Box' and could play the Chase Game, Ping-Pong, Tennis, Handball, Volleyball, and a light-gun game (Poh, 2016:internet). This was just a prototype at the time (Poh, 2016:internet).

Ralph did not stop there and over time added new ideas and built new prototypes (Hadzinsky, 2014:4). In 1970, Ralph and a partner demonstrated a prototype to Magnavox, a television manufacturer Gerry Martin, the Vice President (VP) of Marketing, who was impressed by the idea and convinced the rest of the corporate management to manufacture and distribute Ralph's game box (Hadzinsky, 2014:4). In early 1972 Magnavox showcased the Odyssey at shows showing the year's product line, Ralph's newly named game box, and in August that same year officially released the console (Hadzinsky, 2014:4). The release of the Magnavox Odyssey gave birth to the video gaming industry as it is known today (Rabin, 2005:4). In many people's eyes, this made Ralph Baer the father of video games (Smithsonian, s.a.:internet; The Centre for Computing History, s.a:internet). In 2006, the then United States (US), President George W Bush, awarded the National Medal of Technology to Ralph Baer for his contributions to the video-game industry and more specifically for inventing the home console (Langlotz *et al*., 2008:8; The Centre for Computing History, s.a:internet). Ralph Baer might have sparked an industry but the evolution of video gaming did not stop there as many new iterations and inventions throughout history gave way to its growth and expansion into new sectors (mobile, medical, aviation, education etc.).

4.3.3. The beginning of an Industry

The video-game industry first emerged in the US with the likes of Thomas T Goldsmith Jr, Estle Ray Mann and Ralph Baer and the release of the Magnavox Odyssey (Cucuel,

2011:2). During the Magnavox Odyssey product demonstration on the 24th of May, 1972 in Burlingame, California, the eventual co-founder of Atari, Nolan Bushnell, played the Odyssey and was deeply inspired by its Ping-Pong game (Hadzinsky, 2014:5). After the event, Nolan hired an engineer and started working on a coin-operated arcade game, and by the end of that same year, *Pong* was born (Winter, 2013:internet). 'Pong' was a sensation and would lead Atari to new heights (Hadzinsky, 2014:5).

At the time, early to late 70s, Atari was the only American company in the video-game sector (Cucuel, 2011:2). Video gaming was in its infancy and considered very antisocial since it only allowed one user for playing on a screen that did not allow others to get involved (Lange, 2002:46). Despite having a negative connotation, 'Pong' inspired new iterations or 'clones' of the game, causing a large number of new entrants into the market (Cucuel, 2011:2). This flooded the market with new developers and established big firms such as Mattel and Coleco (Cucuel, 2011:2). In the US, many new job opportunities for programmers and engineers were created as a result, many of whom trained for the defence force (Cucuel, 2011:2).

Since the game 'Pong' and Magnavox's Odyssey console, the video gaming industry has seen many new technological advances in the field of video-game software and console hardware. An historical overview of the console generation up until the present day can be seen illustrated on a timeline in Figure 4.2.

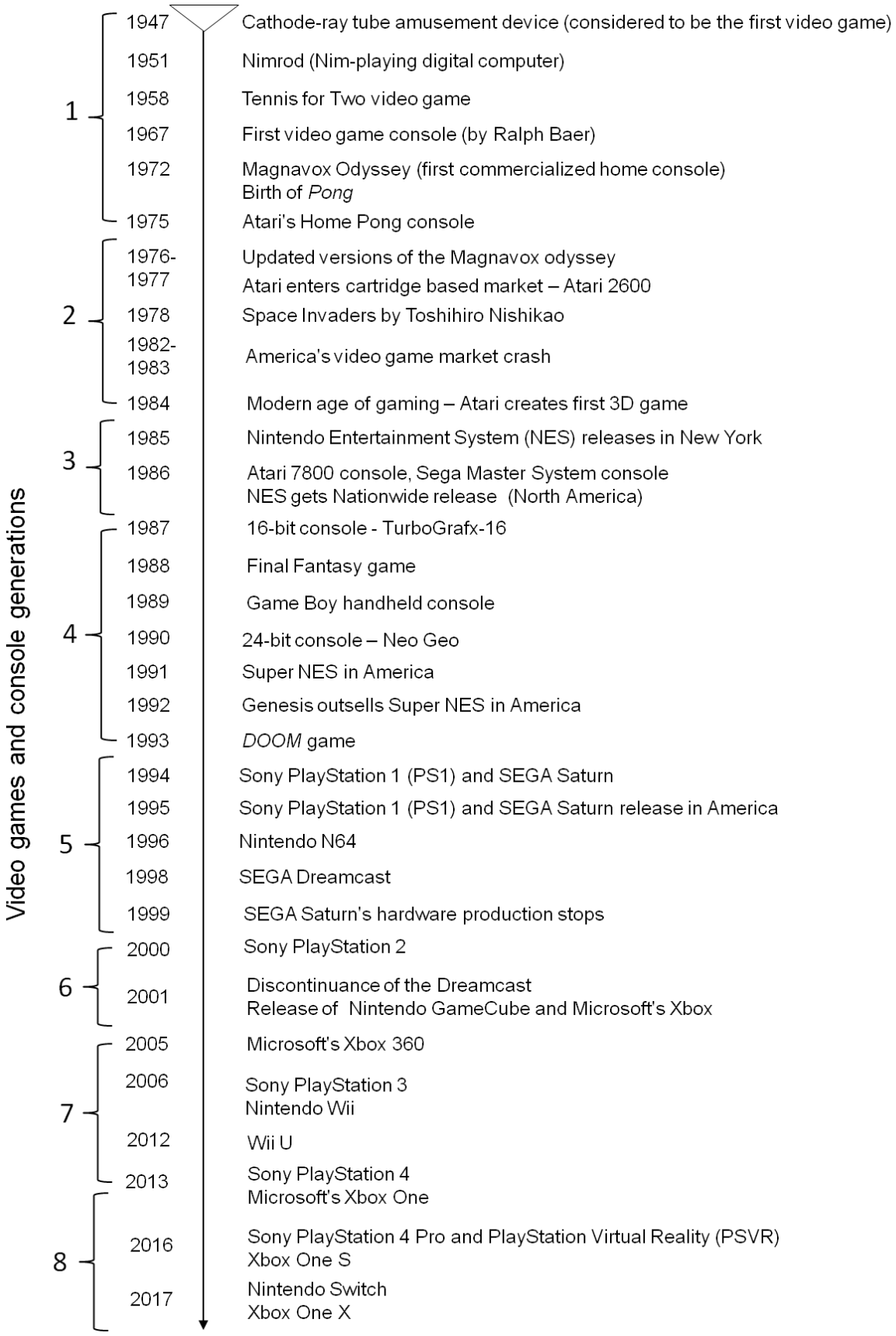

Figure 4.2: Timeline of video games and video-game consoles

Source: Author's own compilation/illustration based on existing literature and information

As shown in Figure 4.2, the following dates are a summary of key historical events in video-game history which shaped the industry as it is known today.

- **1972:** The 'Pong' arcade craze. Atari released the Pong arcade machine in late 1972, which resulted in 19,000 machines sold (Winter, 2013: internet).
- **1975:** Atari's Home Pong console. The Pong arcade machine became so popular in 1973 that Atari decided to market the game as a home console by 1975 (Poh, 2016: internet).
- **1976-1979:** The Odyssey, Atari and Nintendo. During 1976-1977 new versions of the Magnavox Odyssey consoles were produced with some modification to the graphics, controllers and scoring system on-screen although playing the same games (Poh, 2016: internet). In 1977 Atari first entered the cartridge-based home console market with the launch of the Atari Video Computer System (or Atari 2600 as later redubbed) (Rabin, 2005:4). That same year, Nintendo entered the home console market and delivered their first series of game consoles from 1977 to 1979 (Poh, 2016:internet).
- **1977 and 1982/83:** The crash of video games. Due to a lack of creativity and an overwhelming amount of 'Pong' clones by 1977, many companies had to sell their stock just to clean house (Hadzinsky, 2014:5). The arrival of relatively cheap programmable home computers also caused a market collapse in 1982/1983, since it allowed programmers to programme their games (Cucuel, 2011:2). The Atari 2600 was also partly to blame due to poor third-party support and bad high-profile first party titles, specifically the home console version of 'Pac-Man' and the 'ET' movie tie-in game (Rabin, 2005:4). This crash, however, was mostly limited to the American market as many international markets continued to grow (Kent, 2001:278). This was particularly true for Nintendo, a Japanese company and arcade giant at the time, which released the Famicon (game console) in 1983 (Kent, 2001:278).
- **1978-1983:** The spark of revival. Following the US video-game market collapse, *Space Invaders* was released in 1978 by Toshihiro Nishikao's a Japanese developer (NowGamer, 2009:internet). The game sparked the revival of the video-game industry, generating US$2 billion in quarters by 1982 and resulted in many arcade machines to become commonplace in malls, stores, and restaurants (Hadzinsky, 2014:5; NowGamer, 2009:internet). This time frame also saw the introduction of new games that would later become iconic names in gaming history such as the release of 'Packman' in 1980 by Namco, 'Super Mario' and 'Donkey Kong' by Nintendo in 1981, 'Ms Pacman' in 1981 by Namco targeted at female users and 'Star Wars' by Atari in 1983 (Kent, 2001:155; School of Informatics, University of Edinburgh,

2008:11). In 1982 a title-page was devoted by Time magazine to acknowledge video games (School of Informatics, University of Edinburgh, 2008:11).

- **1984:** The modern age. In 1984 Atari created the first 3D game ('I, Robot') which brought about the modern age of video games (School of Informatics, University of Edinburgh, 2008:12).
- **1985:** The NES. Nintendo introduced the Nintendo Entertainment System (NES) to the North American market in New York by which its success saw a whole US release in 1986 (School of Informatics, University of Edinburgh, 2008:12). In that same year, a Russian mathematician by the name of Alex Pajitnov designed the game Tetris (Kent, 2001:XIV).
- **1986:** The console craze. In 1986 Atari released the 7800 Atari game console, Sega, its Sega Master System and the NES saw a nationwide release in America (Kent, 2001:XIV).
- **1987-1988:** The 16bit console. The first 16bit console, TurboGrafx-16, or PC Engine, was released by Nippon Electric Company (NEC) in 1987 and it was the first console featuring a CD-ROM peripheral graphics (Giant Bomb, 2018:internet). It was also the first console that came relatively close to arcade-quality graphics (Giant Bomb, 2018:internet). In that same year the Legend of Zelda game was released by Nintendo and in 1988 Square Soft published Final Fantasy, which is still a major selling and ongoing franchise to date (Kent, 2001:XIV). In 1988, Tonka acquired the US distribution rights to the Sega Master System (Kent, 2001:XIV).
- **1989:** The handheld giant. In 1989 the Game Boy handheld console was released worldwide by Nintendo (Kent, 2001:XV). Although not being the first handheld gaming device, see Mattel's LED-based Handhelds (1977-78), Milton Bradley Microvision (1979), Nintendo's Game and Watch series (1980-1991) and Epoch Game Pocket Computer (1984), it would however, become 'the most successful video-game system ever – handheld or otherwise' (Melanson, 2006:internet). 1989 is also known for its US releases Sega's Mega Drive and NEC's TurboGrafx under the name Geneses (Kent, 2001:XV).
- **1990:** The golden cartridge game. Super Mario Bros. 3 was released in 1990 by Nintendo, which became the most successful non-bundled game cartridge of all time (Kent, 2001:XV). The SNK Corporation released its Neo-Geo console in 1990, which featured a 24-bit engine that made it 'the most powerful machine of the lot' that rivalled arcade machine graphics (Glancey, 1996:69).
- **1991-1993:** Sega, new consoles, ground-breaking 3D graphics and politics. In 1991 Nintendo released the Super NES in America, while Sonic the Hedgehog became

Sega's new Mascot (Kent, 2001:XV). In 1992 Sega effectively dominated the US console market with their Genesis console outselling Nintendo's Super NES (Kent, 2001:XV). In 1993, Id Software published the game *Doom* for PC's, a violent and gory, but technically and graphically masterful 3D game that sparked political debates and Senate hearings on video-game violence (Kent, 2001:XV).

- **1994:** Console wars. Rivalry and competition was not uncommon among video-game console developers and manufactures at the time but it was not until 1994 when Sony introduced the PlayStation that the true 'console wars' began (Park & Lowood, 2002:9). This involved a rivalry between Sony, Sega and Nintendo, with Sega and Nintendo already being household names in the video gaming industry. Sega was the first to launch in Japan on 22 November 1994 with its Saturn game console, while Sony's release of the PlayStation followed less than two weeks later (Park & Lowood, 2002:9). A bit of market miscalculation on Sony's part with the arcade hit release of 'Tekken' on the PlayStation caused Sony to regroup and fight for its survival as Sega ruled with sales in Japan by the end of 1995 (Park & Lowood, 2002:10).
- **1995:** Changing Tides. In 1995 Sega and Sony shifted their focus on America, with the release of the Saturn and PlayStation in US markets (Kent, 2001:XV). What was successful for the Sega in Japan failed in America, but unlike Sega, Sony successfully understood and bridged the cultural gap (Park & Lowood, 2002:9). According to Statista (2016b:internet), the PlayStation went on to achieve the 4th highest video console sales of all time with 104.25 million units sold by 2016, whereas Sega's Saturn had estimated sales ranging from 9.5 million units to 17 million units (Sega Retro, 2017:internet).
- **1996:** Its mostly about Nintendo. 1996 Marks the year when Nintendo sold its billionth game cartridge worldwide (Kent, 2001:XVI). Also, to compete with Sega and Sony's consoles, Nintendo released the Nintendo 64 (N64) in the US, while during the same year discontinuing their Virtual Boy 32-bit table-top video-game console (Kent, 2001:XVI).
- **1997:** Saturn's demise. With lacklustre sales in the US and poor market knowledge, Sega Saturn projects got abandoned in the West by the summer of 1997 (Sega Retro, 2017:internet; Kent, 2001:XVI). Nintendo's N64 also did not do Sega's Saturn any favours, since console sales for the Saturn had fallen well behind that of Sony's and Nintendo's machines after the holiday shopping season in 1996 (Sega Retro, 2017:internet). It also did not help Sega at the time that its competitor's consoles were easier and cheaper to produce. The production of Saturn hardware however

ceased by 1998 and software production for the system ended by 1999 (Sega Retro, 2017:internet).

- **1998-1999:** A failed comeback. As an attempt to learn from their past mistakes, Sega released the Dreamcast in 1998 (Kevingifford, Polygon, 2013). The console was more developer friendly and one that could appeal to more gamers (casual and hard-core) (Kevingifford, Polygon, 2013). Unfortunately, due to a 'price war' between the company's competitors and high production costs of the Dreamcast, the company actually lost money on the console (Kevingifford, Polygon, 2013:internet).
- **2000:** The bestselling console of all time. In 2000, the PlayStation 2 was released in Japan (Kent, 2001:XVI). The PlayStation 2 was the successor to the original PlayStation and would later become the console that sold the most units worldwide (Lee, 2012:85). As of June 2016, the PlayStation 2 sold 157.68 million consoles worldwide (Statista, 2016a:internet).
- **2001:** Out with the old in with the Xbox. The release of the PlayStation 2 the previous year meant that Nintendo had to up their game and thus release two successor consoles, the Gameboy Boy Advance for the handheld market and GameCube for the television console market (Kent, 2001:XVI). The Nintendo GameCube was also Nintendo's first console to feature an optical drive to play CDs and DVDs (Payton, 2012:6). Sega's failure to make a comeback resulted in the discontinuance of the Dreamcast in 2001, the same year Sega's Chairman past away, Isao Okawa (Kent, 2001:XVI). Although a tragic year for Sega, a new console came into play and this was Microsoft's Xbox (Lee, 2012:86). The Xbox would become even more popular than its Nintendo's competitor console the GameCube and as of June 2006 sold 24.65 units, 2.91 units more than the GameCube (Statista, 2016b:internet). The Xbox was also the first console featuring a hard drive for saving games and online content, and differed from its competition with its focus on online multiplayer and subscription live service (Payton, 2012:6).
- **2005-2013:** The three industry leaders. In 2005, the Microsoft Xbox 360 was released as the successor to the Xbox and marked the 7th generation of video-game consoles (Payton, 2012:7). The Xbox 360 was the first High Definition (HD) capable console and could achieve a native Full High Definition (FHD) resolution (1920x1080 pixels) (Payton, 2012:7). The following year (2006) Sony released its PlayStation 3 and Nintendo its Wii console. Sony's PlayStation 3 featured a Blue Ray Disc drive never before seen on a home console, which could play Blue Ray movies at FHD resolution. Blue Ray technology was very new at that stage in the general market and would even be used in successor consoles (8th generation consoles). The Wii

however was the least powerful console of the three consoles, but featured an infrared-camera and accelerometer-equipped controllers that motion tracked your movements for a new level of gaming interactivity in a 3-dimensional space (Payton, 2012:8). Although being a much graphically weaker console, the Wii outsold both the Xbox 360 and PS3, proving that casual gaming, as well as creativity and originally still had a big role to play in the video gaming industry (Payton, 2012:8).

- **2013 to present:** The current generation. Nintendo had its foot first out of the door with the release of the Nintendo Wii U back in November 2012 (Delforge & Horowitz, 2014:5). Unfortunately, the rush to be this first next generation console, a lack of clear marketing communication and a meagre graphical leap over current hardware (at the time) resulted in the Wii U having very poor market reception/sale numbers, which sold only 13.14 million consoles by June 2016 compared to the Wii's 101.18 million units (Statista, 2016b:internet). The following year (2017) Sony released the PlayStations 4 and Microsoft its Xbox One console, although misleading by name is the successor to the Xbox 360.

The PS4, Xbox One and Wii U represents the current and 8th generation of home consoles, but it does not end there as new iterations of Sony's and Microsoft's consoles received upgraded versions in 2016 and 2017 respectively. Nintendo also made a new move by introducing its Switch console in 2017 but this will be discussed in the following section that covers the current video gaming industry and console generation.

4.3.4. The current industry and console generation

The video-game industry was worth US$ 101.1 billion in 2016 and is expected to reach US$ 108.9 billion in 2017, US$ 115.8 billion in 2018 and grow to USD 128.5 billion by 2020 (Newzoo, 2017a:internet). It is also projected that the current mobile video-game market (smartphones and tablets) will be the majority revenue stakeholder by 2020, representing 50.5% of the video-game market as compared to the 42.3% in 2017 (Newzoo, 2017a:internet). By no means will this make the console and PC gaming industry irrelevant since new hardware and games are still in development and released yearly. The video-game console industry is even projected to be profitable by the year 2020 (Bitto & Scott, 2015:4). The compound annual growth rate of the console market has also been estimated to grow 11.5% annually over the period of 2015 to 2020 (Bitto & Scott, 2015:4).

However, what makes this console generation different from previous ones are Sony and Microsoft's alternative focus towards releasing upgraded consoles playing the same generation games. This is due to fast-growing and recent advances in TV technology (Ultra

High Definition (UHD) and High Dynamic Range (HDR)), as well as in the field of computer graphics (Wang, Wang, Sloan, Wei, Tong & Guo, 2007:17). To briefly explain, HDR on TVs aims at making colours appear more realistic with panels that offer more colours (wide colour gamut) and increased contrast levels between black (dark blacks) and white (bright whites) (Thang, 2017: internet). UHD or 4K resolutions represents four times the resolution of Full HD, thus having four times 1920x1080 pixels on a TV or monitor which amounts to 3840x2160 = 8,294,400 pixels (Thang, 2017:internet). In other words, the more pixels, the better the image clarity and sharpness. Dynamic 4K or adaptive 4K represents resolutions that can vary above 1080p and equal or below 2160p and can use up-scaling and checker-boarding techniques to look much better on our 4K screens (Leadbetter, 2017:internet).

Microsoft was the first one out of the gate, releasing the Xbox one S in August 2016, a refreshed console of the Xbox One. The console could support HDR and UHD content and featured a 4k Ultra HD Blue-ray player (console first) (Xbox, 2017:internet). However, this only meant the console could support UHD content and does not play games at that resolution as it was merely adapted to take advantage of these new television technologies. On 10 November 2016 Sony released the first console (PS4 Pro) that truly supported native 4k UHD and Dynamic 4k UHD gaming together with High Dynamic Range support (PlayStation, 2017:internet). The PS4 Pro is a high-end version of the PS4 that plays the same games as the PS4 but with better-looking graphics/resolutions and frame rates (Shuman, 2016:internet). In response to the PS4 Pro, Microsoft released the Xbox One X on 7 November 2017 (Dingman, Chacos & Yee, 2017:internet). Besides better hardware and a 4k UHD Blue-ray player, which PS4 Pro does not have, the Xbox One X ultimately serves the same purpose as the PS4 Pro.

Alternatively, while Sony and Microsoft competed for having the most powerful console on the market, Nintendo had a different vision and released the Nintendo Switch on 3 March 2017 as the successor to Wii U (Reynolds, 2017:internet). Unlike the PS4 and the Xbox One and their upgraded versions, the Nintendo Switch can be played on the move since it is both a portable handheld console with a screen and a home console when its docked and plugged into a TV set (Nintendo, 2017:internet). It also seems that Nintendo has learned from its past mistakes, since launch sales for the Nintendo Switch were well above that of the Wii U, having sold 4.7 million consoles in roughly four months from its release date (Morris, 2017:internet). Unfortunately, due to high demand for the Nintendo Switch, stock shortages have become an obstacle for the company and as a potential result saw the PS4 outselling Nintendo’s console during June and July 2017 in Japan (Dassanayake,

2017:internet). By January 2018 the Nintendo switch has become the fastest selling home video-game system of all time in the US (Morris, 2018:internet).

A closer look at current generation console sales reveals that of June 17th 2017, the Nintendo 3DS handheld console sold 65 million units, with the PS4/PS4 Pro in second place with 60.7 million units, Xbox One at 3rd with 30.2 million units, Sony's PSVITA handheld console (successor to the PSP) at fourth place with 15.6 million units and the Wii U at 13.9 million units (VGChartz, 2017a:internet). On the software/video-game side, Grand Theft Auto V (released 2014 on PS4) took the lead with 15.73 million copies sold on the PS4, Pokemon X/Pokemon Y (released 2013) at 15.37 million copies on the Nintendo 3DS, Call of Duty: Black Ops 3 (2015) at 14.97 million copies on the PS4, Pokemon Sun/Moon (released 2016) at 14.12 million copies on the Nintendo 3DS and Pokemon Omega Ruby/Pokemon Alpha Sapphire (released 2014) at 12.43 million copies also on Nintendo's 3DS (VGChartz, 2017a:internet). Although not considered an 8th generation console, the Nintendo 3DS remains a popular platform among gamers and game developers, even outselling its 8th generation brother the Wii U on a weekly basis (VGChartz, 2017b:internet). As such, to include both 7th and 8th generation consoles and their respective software, Table 4.1 was drawn up to reveal the global rank of hardware sales.

Table 4.1: Hardware vs. software vs. games for the current and previous generation

Position	Platform	Global hardware sales (in million units)	Software sales (in million units)
1	Wii (7th gen)	101.64	965.78
2	PlayStation 3 (PS3) (7th gen)	86.90	974.58
3	Xbox 360 (7th gen)	85.80	1,007.62
4	PlayStation Portable (PSP) (7th gen)	80.82	304.61
5	PlayStation 4 (PS4) (8th gen)	74.01	482.91
6	Nintendo 3DS (3DS) (7th gen)	71.08	312.70
7	Xbox One (8th gen)	36.48	229.26
8	Wii U (8th gen)	13.97	92.62
9	Nintendo Switch (8th gen)	13.73	35.75
10	Microsoft Windows (PC)	-*	312.14

Note: Positions are ranked based on software sales for each platform up until the year 2018. *No measurement exists to accurately measure global hardware sales dedicated to playing PC games.

Source: Adapted from VGChartz (2018:internet)

If the above figures are of any indication, it would appear that Nintendo and Sony are leading the current generation console market landscape. This is particularly true for Japan

(MarketLine, 2017a:12) but not in the case of the US (MarketLine, 2017b:12) and UK (MarketLine, 2017c:12) as indicated in Table 4.2. The reason Sony and Nintendo show significantly higher market share in Japan is that the handheld console market is more popular over there (MarketLine, 2017a:8). Sony and Nintendo both have handheld consoles such as Sony's PSVITA and Nintendo's 2DS, 3DS, and Switch, while Microsoft does not. As for the US and UK, handheld consoles are significantly affected by the number of Smartphones (mobile games) and the ability to play older generation nostalgic games on PC and newer game consoles (MarketLine, 2017c:8, 2017b:8).

Table 4.2: Games console market in the biggest video gaming countries

Consoles	**United Kingdom**	**The United States of America**	**Japan**
Games console market (worth)	$ 491.0 million (2016) (MarketLine, 2017c:9)	$ 2,286.1 million (2016) (MarketLine, 2017b:9)	$ 835.4 million (2016) (MarketLine, 2017a:9)
Games console market volume (units)	2 million units (MarketLine, 2017c:10)	9.4 million units (MarketLine, 2017b:10)	3.7 million units (MarketLine, 2017a:10)
Games console market share	Sony (43.1 %) Microsoft (37.8 %) Nintendo (19.1%) (MarketLine, 2017c:12)	Sony (39.6%) Microsoft (36.5%) Nintendo (24%) (MarketLine, 2017b:12)	Sony (56.2%) Microsoft (0.2%) Nintendo (43.6%) (MarketLine, 2017a:12)

Source: Adapted from MarketLine (2017a, 2017b, 2017c)

What is also evident in all three mentioned markets, including the European market, is that the game console market is showing a decline in the compound annual rate of change (CARC) (MarketLine, 2017a:7, 2017b:7, 2017c:7). This is especially true for the Xbox One and Wii U consoles (Murphy, 2016:internet). The compound annual growth rate represents the mean annual growth rate of an investment over a period longer than one year (Investopedia, 2017:internet). The MarketLine (2017a:10, 2017b:10, 2017c:10) reports also identified a gradual decrease in annual game console sales in Japan (2012-2016), the US (2012-2016) and the UK (2014-2016).

A reason behind this gradual decline in console sales is largely the result of a growing mobile gaming market (MarketLine, 2017a:7, 2017b:7, 2017c:7; Murphy, 2016:internet). Evidence of this can be seen in the world's largest video gaming market, China, where mobile gaming was recorded as the fastest growing segment of the video gaming industry in 2016 (Nordic Game Institute, 2016:4). Also in 2016, viewed from a global perspective, Newzoo (2016a:3) revealed that mobile gaming represented 37% of all global game market revenues, followed by PC gaming at 32% and console gaming at 31%. What is more, mobile

gaming has even become more popular than some of the US's top adds supported networks such as CBS, NBC, FOX and ABC (Chartboost, 2017:internet). Currently, there are more than 2.1 billion mobile gamers worldwide (Newzoo, 2017d:13). Alternatively, Virtual Reality (VR) for consoles and PC could be the answer these platforms need to compete with the growing mobile market as identified by Murphy (2016:internet). An examination of this technology and its application in video games is explored in the next section.

4.3.5. Virtual reality and its future

A rather new technological advancement in video games that became popular during the current generation of video games is the mainstream introduction of virtual reality (VR) gaming. Virtual reality artificially stimulates the senses and tricks them into accepting another version of reality (LaValla, 2017:1). The aim of virtual reality in games is to provide gamers with a greater feeling of immersion, in that greater immersion involves tricking the mind via sensory stimulation to create a sense of presence through 3D environments using 'computer graphics, sound, and haptics; affective computing - sensing human state and emotion; and advanced user interfaces' (Zyda, 2005:29). What is interesting is that although VR is considered a new advancement in immersive video gaming experiences, the technology behind today's VR can be traced back to the 1960s (Steinicke, 2016:25, 27).

The first VR headset was introduced in 1968 by Ivan Sutherland called the 'Sword of Damocles' and it took the shape of a periscope-like helmet (Steinicke, 2016:27). The headset had a 3D stereoscopic display and immersed the viewer in a simulated 3D environment that consisted only of wireframe 3D models (Steinicke, 2016:27). The technology and its applications at the time were not referred to as virtual reality, and only in 1985 did Jaron Lanier, co-founder of the visual programming lab (VPL), coin the term virtual reality and popularised the term in the media (Steinicke, 2016:27). It was not until the early 1990s that the first VR games were produced and launched by a British company W Industries founded by Jonathan D Waldern (Steinicke, 2016:29). The games were played on their *Virtuality* (1991) gaming machines, requiring the player to wear VR goggles and a joystick as the controller (Steinicke, 2016:27).

The 1990s was also an extremely popular time for VR since many media outlets started taking an interest in the technology (Mazuryk & Gervautz, 1996:3). Unfortunately, with so much attention on a relatively new technology, the term often were misused or misinterpreted (Mazuryk & Gervautz, 19996:3). The reason being that new, promising and fascination technology captured greater interest as opposed to computer graphics, causing fuzzy interpretations between the border of 3D computer graphics and VR (Mazuryk &

Gervautz, 1996:3). Other reasons could be that the technology was still in its infancy phase with many people defining it in different ways (see Carlsson & Hagsand, 1993; Gigante, 1993; Von Schweber & Von Schweber, 1995) or calling it different things such as ‘Synthetic Experience, Virtual Worlds, Artificial Worlds or Artificial Reality’ (Mazuryk & Gervautz, 1996:3).

Without going too deep into the history or differences in VR technology, VR experiences can be divided into two extremes. At the one end is ‘Captured VR’ that rely on real-world images and on the other end is ‘Synthetic VR’ that is completely invented from geometric primitives and simulated physics (LaValle, 2017:7). Synthetic experiences are of particular interest within the video games scene since most games are experienced within 3D synthetic environments or fully rendered CGI interactive worlds created by video-game developers, designers and programmers (Watson, 2017:9). Looking at modern-day VR, the Oculus Rift, HTC Vive and Sony PlayStation VR rank among the most popular VR video gaming headset systems dedicated to gaming (Watson, 2017:8). Like the VR technology of old, these headsets use external PCs/PC such as machines to power and generate the graphics experienced on the screens. Unlike VR Technology of old, many mobile phones today only require a mobile VR headset or VR viewer to produce VR experiences (see Watson, 2017:8). Although mobile phone VR games do exist, it is the high-end gaming dedicated VR headsets such as the Oculus Rift, HTC Vive and Sony PlayStation VR that takes the throne with greater graphical prowess, deeper levels of immersion, interactivity and higher-quality experiences (Foster, 2017:internet). The development costs of making games for these high-end VR devices also tend to be much higher than say a 360-degree video or mobile VR experience (Interactive Advertising Bureau [IAB], 2016:7). Figure 4.3 illustrates the spectrum of VR devices and their relative levels of immersion and development costs. At the low immersion and developing cost end is 360 ‘spherical’ videos on laptops/desktops and mobile phone devices, where one can watch a 360 degree video guided by a controller such as a computer mouse or by the accelerometer of a mobile device (turning the phone or swiping). Whereas these experiences fall short of the true VR threshold, VR through Google Cardboard is seen as the most basic form of VR whereby a phone is placed in a cardboard box and held to your face to give you a virtual 3D experience (Ullman, 2017:internet). Mobile VR through dedicated displays can allow the user to interact with low-graphics interactive gaming on a mobile device for consumers wanting to experience VR without the resources to invest in dedicated PCs or consoles. At the high end of immersion and development costs are PC and PSVR headsets. Graphically these devices are more superior than their mobile counterparts and can provide a better sense of immersion and interactivity (Ullman, 2017:internet). This also means more expensive peripherals and headset gear as well as

higher development costs that accommodate better graphics (IAB, 2016:8; Ullman, 2017:internet).

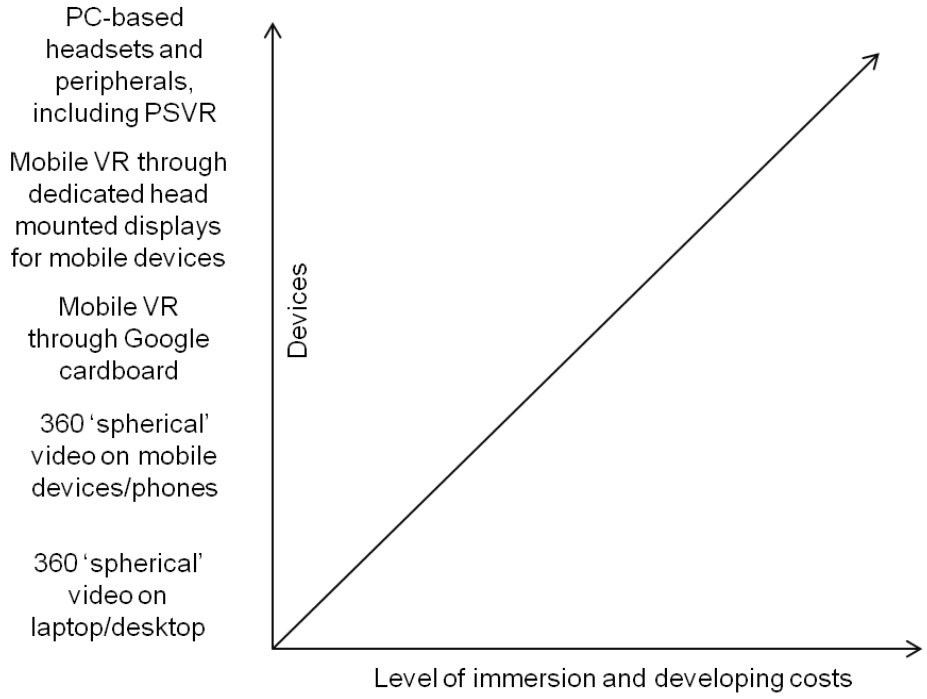

Figure 4.3: Spectrum of VR gear vs. immersion and development costs
Source: Adapted from IAB (2016:2)

Concerning the release dates of this generation's high-end gaming VR gear, the HTC Vive was the first to be release on 5 April 2016, followed by the Oculus Rift on 28 March 2016 and Sony's PS VR on 13 October 2016; the latter being the bestselling version of the three (Ergürel, 2017:internet). In 2016, 745K PSVR units were shipped, followed by 420K HTC Vive units and 243K Oculus Rift units (SuperData Research Holdings, Inc., 2017:internet). Alternatively, Samsung Gear VR for mobile phones sold 4 326 million units making it the most popular form of VR (SuperData Research Holdings, Inc., 2017:internet). Seen as a niche offering, VR has shown tremendous growth since the gear VR released back in November 2015 (IAB, 2016:7). In 2016, the VR industry was worth US$ 1.8 billion and is expected to grow to US$ 4.9 billion in 2017 and reach US$ 37.7 billion by 2020 (SuperData Research Holdings, Inc., 2017:internet). Unlike software revenues for the console market, VR hardware revenues represent the bulk of the VR market with its US$ 1.5 billion share back in 2016 (SuperData Research Holdings, Inc., 2017:internet). Software revenues for VR are expected to surpass hardware revenues by 2020 (SuperData Research Holdings, Inc., 2017:internet). Bear in mind that not all VR revenues are video-game based but video games are the most popular use of VR technology today (IAB, 2016:7), seeing that 44% of

consumer software sales comes from games followed by 35% location-based software, 10% media entertainment, 6% interactive entertainment and 6% anything else VR oriented (SuperData Research Holdings, Inc., 2017:internet).

Much like VR, augmented reality (AR) has been highly popularised by the video gaming industry. Unlike gaming's origins with VR in the early 1990s, the application of AR technology to video games began in 2000 (Thomas, Close, Donoghue, Squires, De Bondi, Morris & Piekarski, 2000:140). Augmented Reality (AR) is a variation of VR or Virtual environments (Azuma, 1997:356). Whereas VR experiences completely immerge the user in synthetic experiences, AR allows the user to see the real world with virtual objects superimposed upon or composited within the real world (Azuma, 1997:356). According to Piekarski and Thomas (2002:36):

> Augmented reality (AR) is the process of overlaying and aligning computer-generated images over a user's view of the physical world.

The first outdoor AR game on an easily portable device was 'AR Quake' by Bruce Thomas in 2000 (Thomas *et al*., 2000:139). The game aimed to provide a first-person-perspective on a device played in the real world, allowing the user to move freely and interact (shoot) with virtual objects (monsters) (Piekarski & Thomas, 2002:37). It was around 2010 that AR games started expanding to smartphones, which gave it significant popularity around the world (Das, Zhu, McLaughlin, Bilgrami & Milanaik, 2017:2; Wu, Wen-Yu, Chang & Liang, 2013:42). Although AR games such as 'Zombies, Run!' and 'DJ Rivals' were very popular in their time (downloaded over 500,000 times on the Google Play App Store), it was not until 2016's Pokémon GO by Niantic that reached a real milestone in AR games history (Das *et al*., 2017:2). In 2017, Pokémon Go earned a total of $1.2 billion in revenues and was downloaded 752 million times (Minotti, 2017:internet). This also makes Pokémon GO the most successful AR game to-date.

In 2016, AR amounted to $1.2 billion in revenues with VR taking the lion's share of $2.7 billion in revenue (Digi-Capital, 2017:internet). When it comes to the future of VR and AR sales revenues, according to Digi-Capital's Augmented/Virtual Reality Report 2017, it is expected that AR revenues will far surpass VR revenues by 2021 with AR amounting to US$ 83 billion in revenues and VR $25 billion in revenues (Digi-Capital, 2017:internet). Whatever the future holds, both AR and VR has a place in it and as predictions go, will grow into substantial industries, revolutionising the way games are experienced but also the activities performed in people's daily lives (Boyle, 2016:7).

It is because of technologies such as AR, VR, mobile gaming and more accessible access to a faster broadband internet connection that video gaming is starting to branch into new and different experiences. Such new landscapes also change the way games are developed and distributed. Traditionally, this means moving away from the retail selling of games or having access to a more direct approach to getting the final product to the consumer. The following section thus examines the traditional value chain of the video-game industry and its emerging value chain.

4.4. The value chain of the video-game industry

Porter (1985:36) argues that 'every company is composed of a set of activities performed to design, produce, deliver, bring to market and support the product. All these activities can be represented by a value'. In the cultural sector, as well as the creative sector, the concept *value* is related to satisfaction, optimism or enrichment and plays a key role throughout the innovation process (González-Piñero & Soto, 2017:18). Innovation is a process of idea generation or invention and the conversion of that idea or invention into a business or other useful application (Roberts, 1988:12). The innovation process consists of three stages that are the idea generation stage, the development or problem-solving stage and lastly, the commercialisation or results-generated stage (Magdalena, 2015:56). It is important for cultural or creative projects to be evaluated for their ability to generate value during the different phases, by not only transferring new ideas to the market but also making progress throughout the value chain to obtain end process improvement (González-Piñero & Soto, 2017:18). Therefore, the innovation process should be more than just turning ideas into products, but rather turning ideas into valuable ideas that could generate sustainable benefit for organisations seeking to monetise on this added value (Gonzalez-Piñero, Cano, Mananas & Caminal, 2012:159). To create 'value innovation' it is essential for any company to reduce cost and increase the value to the buyer. This strategy needs to span across the entire value chain of a company. According to Kim and Mauborgne (as cited by González-Piñero & Soto, 2017:18) there are four proposed stages one could follow to create value through innovation, namely: (1) eliminate what is not valued; (2) reduce that which is less valued; (3) increase that which is most valued; and (4) shift focus to buyers-user empowerment in the design process.

The last of the four stages is of particular interest and describes a process in which a firm relies on an external consumer community for innovation (Jeppesen & Molin, 2003:363). This is because the video-game industry is one of the first industries to emphasise empowering its customers to help with innovation and the product development process (Jeppesen & Molin, 2003:364). In many cases, video-game consumers can participate in

online communities where they can communicate and exchange ideas and software that could help shape the product (Jeppesen & Molin, 2003:364).

Gathering value or increasing value using the stages mentioned above, such as user empowerment in the design process, allows products and services to reach markets with additional value. Value can also be created or incorporated in every step of the value chain, from ideas being generated to product development and commercialisation (González-Piñero & Soto, 2017:18). According to Porter (1985:xiii), the competitive advantage of a firm has its origin in the activities implemented in the value chain of the company. The value chain represents the methods, activities or models used to transform the vision of an enterprise into something that generates value for an organisation, be it a service or a product (Martin, 1995:66). These activities embody the concept of the value chain representing the different processes such as into generating ideas, designing, producing, marketing, delivering and supporting the product (Porter, 1985:xxi; Tomaselli, Di Serio & De Oliveira, 2008:6).

Bogdanowicz *et al.* (2010:2-3) followed a traditional view of the value chain which they adapted for the video gaming industry. This value chain consisted of six activities or processes starting with developers, enabling technologies (software and middleware), publishers, distributors/retailers and ending with the user interface (consoles, PCs, and mobile devices) (Bogdanowicz *et al*., 2010:2). Unfortunately, Bogdanowicz *et al.* (2010:2) recognised that the model seemed to fail in capturing the dynamics at stake. In 2017, González-Piñero and Soto (2017:20) adapted Business Insights (2009:59) value chain to form yet another value chain for the video gaming industry. This video-game industry value chain has a more traditional look of the industry, identifying five value-added industry players in the development of video games (see Figure 4.4). The role of each industry player is briefly summarised as follows (Business Insights, 2009 adapted by González-Piñero & Soto, 2017:20):

- Hardware manufacturer: The supplier of hardware on which the games are played such as consoles and PCs.
- Developer: Oversees, designs, and writes software programs for games.
- Publisher: Produces and distributes video games.
- Distributor: Marketing and distribution intermediaries between developers, publishers and retailers.
- Retailer: Retails/sells video-game hardware and software to consumers

- Consumer: Userof gaming hardware and software. This phase is also supplemented by ongoing support from hardware manufacturers and software developers and occasionally addresses community feedback/concerns.

Figure 4.4: Traditional video-game value chain
Source: Adapted from González-Piñero and Soto (2017:20)

Fortunately for developers and end-users, the progressive shift to online gaming over recent years has introduced the use of internet disintermediation (González-Piñero & Soto, 2017:26). Internet disintermediation provides developers with new and alternative ways of distributing or commercialising games through the power of the internet, while end-users benefit from having easier access (not having to go to a retail store) to more available games (digital games cannot be sold out) (González-Piñero & Soto, 2017:26). This led to the emerging video gaming value chain which introduces the role of the internet and its redefining impact on the value chain (see Figure 4.5).

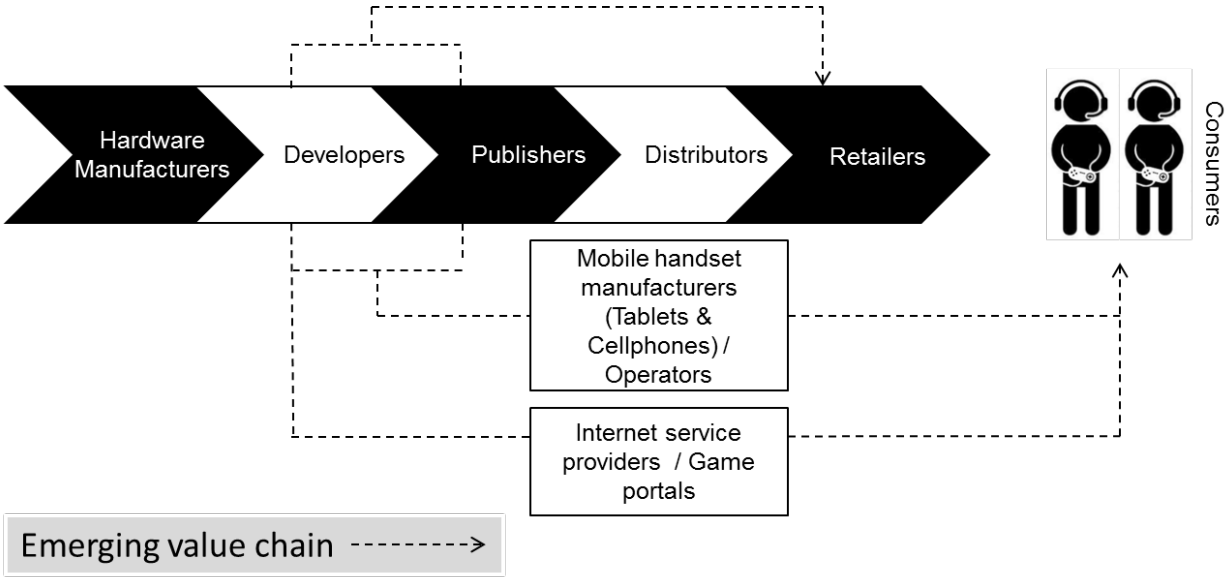

Figure 4.5: New emerging video-game industry value chain
Source: Adapted from Business Insight (2009:62)

From the emerging video-game industry value chain, it is evident that distributors and retailers are affected most since digital products are produced and distributed on the network

that makes these processes irrelevant (Business Insight, 2009:61). When it comes to mobile or handheld devices (tablets), the emerging value chain is of particular interest (Marchand & Hennig-Thurau, 2013:142), since games on these platforms are exclusively available in digital format. Video-game portals such as Steam and Google Play are seen as portals for digital game downloads, while the Ubisoft Official Store is a direct portal for Ubisoft developers to distribute their games. It is also evident from Figure 4.5 that game developers and publishers can develop games for mobile handsets, which skip the traditional distributor and retail roots and introduce mobile handset manufacturers/operators instead. This also places the hardware layer at a later stage of the value chain, just before the end-user.

Additionally, one could add investment as another layer to the video games industry value chain (see Scottish Qualifications Authority [SQA] Academy 2012:1; Stevesgames, 2012:internet). This sector is placed before the developer's sector, also referred to as the design, creative, production, and tools layer, and represents the investment used to pay for the development of new titles (SQA Academy, 2012:1). Some developers may self-fund their projects (no need for the investment layer), but video games are very expensive to make, and thus may require outside investment of capital to develop a game (Stevesgames, 2012:internet). Investors seek a return on their money which is primarily done through licensing (SQA Academy, 2012:1). Games with large-target audiences will also look more beneficial for investors to invest. Fortunately, as more and more technological advances are introduced that ease developers in creating games the need for an investment layer may no longer be needed (Stevesgames, 2012:internet). These same technological advances (e.g. Internet connectivity) are responsible for shaping the video-game industry, and the way the video gaming industry value chain is perceived. Subsequently it will not be implausible to find new iterations of future value-chains (González-Piñero & Soto, 2017:28). The same can be said of the impact technological changes can have on future consumer needs and trends. As an evolving industry it is thus important to stay up-to-date on video gaming markets and trends. Understanding the market can greatly aid in planning and growing an industry and as such the following section is provided to examine current profiles and behaviours of gamers.

4.5. Socio-demographic profile and gaming behaviour of video gamers

What and who qualifies as being a ‘gamer’? In general it is accepted that gamers are people who enjoy playing video games (Grooten & Kowert, 2015:70-71). Despite this ubiquity of the term, the actual meaning remains actively debated, ‘particularly among researchers’ (Grooten & Kowert, 2015:71). On the one hand a gamer may be a denotation to categorise people who play video games while others see it as an identifier of one’s personal and social identity (Kowert & Oldmeadow, 2012:1-2) or as an identity defined by consumption (Shaw,

2013:internet). According to Juul (2010:9), a player of a digital game is ‘someone who interacts with a game, and a game is something that interacts with a player; players choose or modify a game because they desire the experience they believe the game can give them.’ By combining the work of several researchers, Grooten and Kowert (2015:83) identified gamers to be more ‘than simply an individual who plays video games, as it refers to a multi-faceted social identity that spans personal, social, and virtual contexts.’ Therefore, gamers are not just people who mere play video games but who can associate with it on a personal, social or virtual context.

But where are these people? Who are they? and why do they play? Although video games originated in the US, China currently takes the crown for the country with the biggest gaming industry in the world with a market value of US$37.9 billion, followed by the US (US$ 30.4 billion) (Newzoo, 2018:internet). In the second quarter of 2017 the video-game market was worth $108.9 billion globally with the Asia-Pacific region being the majority shareholder, representing 47% of the global total, followed by North America (25%), Europe, Middle-East and Africa (24%) and Latin America (4%) (Newzoo, 2017a:internet). In comparison, South Africa’s video gaming industry appears small with a market value of only $163 million (Big Fish Games, 2017:internet). Even though it is one of Africa’s largest video gaming industries (3rd in Africa as of 2017), compared to the rest of the world, South Africa comes in at 45th place in video-game revenues (Newzoo, 2018:internet). For South Africa, however, the video gaming industry shows promise as its projected to be the fastest growing industry in the country (Big Fish Games, 2017:internet), not to mention that its game development industry increased its revenue from R29.7-million in 2014 to R100-million in 2016 (Collins, 2017:internet).

As for gamers, little is known about South Africa’s video-game market. In this age and era, this lack of information is very problematic since more than two billion people around the world play games (Collins, 2017:internet; Ukie, 2016:internet). According to research done by Newzoo (2016:16-20), the Asia-Pacific region accounts for 1 053 047 000 gamers, Middle-East and Africa with 301 364 000 gamers, Latin America with 209 008 000 gamers, North America with 198 051 000 gamers, Western Europe with 184 627 000 gamers and Eastern Europe with 152 528 00 gamers.

With more than 7 billion people on the planet, it is clear that countless people have played or play games regularly. It is a substantial market, and thus with any market, many a success can rely on understanding it. So to get a better grip on gamers and their preferences (age, gender, platform of choice, genre of games played and popular games being played) on

some of the world's biggest video gaming markets/economies, see Table 4.3 as it provides a summary on these profiles.

Table 4.3: Video gamer demographics and behaviours in the top six video gaming economies

Country	**Player base** (estimated)	**Age**	**Gender**	**Preferred platform**	**Most popular genre**	**Popular/best-selling games/most played** (2016-2017)
China	600m (Bloomberg Technology, 2017: internet)	Between ages 21 and 35 years (Newzoo, 2014b:31).	Mostly male gamers (Newzoo, 2014b:31). 51% Male mobile gamers and 49% female mobile gamers (Custer, 2016:internet).	Consumer spending on games (Harding-Rolls & Cui, 2017:internet): • PC (51%); • Mobile gaming (48%) and; • Console gaming less than 1%	• Real-time strategy games (RTS) • Role-playing games (RPG) • Massive Multiplayer Online Real-time strategy (MMORPGs) • Multiplayer online battle arena (MOBA) (Custer, 2017: internet)	**Hard-core games**(Custer, 2017: internet; Gardner, 2017: internet)**:** • Starcraft • World of Warcraft • League of legends • Dungeon Fighter Online • Kings of Glory • Hearthstone • Dota 2 **Casual gaming** (Custer, 2017: internet)**:** • Angry birds • Plants vs. zombies • Fruit ninja
United States of America	160.3m (Newzoo, 2017c: internet)	35 Years average for male gamers and 44 years for female gamers (ESA, 2016:3)	50% Male 50% Female (ESA, 2016:3)	• PC (56%) • Dedicated game consoles (53%) • Smartphones (36%) • Wireless devices (31%) • Dedicated handheld system (17%) (ESA, 2016:5)	• Shooter (24.5%) • Action (22.9%) • Sport (13.2%) • RPG (11.6%) • Adventure (7.7%) • Fighting (6.7%) • Racing (4.1%) • Other (9.3%) (ESA, 2016:10)	1. Call of Duty: Infinite Warfare 2. Battlefield 1 3. NBA 2K17 4. Madden NFL 17 5. Grand Theft Auto V 6. FIFA 17 7. Tom Clancy's Ghost Recon: Wildlands 8. Final Fantasy XV 9. Legend of Zelda: 10. Breath of the Wild 11. Overwatch (Gamespot, 2017: internet)

Japan	65m (Newzoo, 2017e: internet)	Between ages 21 and 35 years. (Hasegawa, Ito, Kawano, Kibata & Nonomura, 2012:14)	63% Male 37% Female (Newzoo, 2017e:internet).	• Mobile gaming • Nintendo Switch • Sony PS4 • Nintendo 3DS • Sony PS Vita (Yin-Poole, 2017:internet)	• Action • RPG (including Japanese RPG) • Sport • Platform (Big Fish Games, 2013:internet; Yin-Poole, 2017:internet).	1. Monster Hunter XX for 3DS 2. Pokémon Sun and Moon for 3DS 3. Mario Kart 8 Deluxe for Switch 4. Zelda Breath Of The Wild for Switch 5. Super Mario Maker for 3DS 6. Biohazard 7 for PS4 7. NieR: Automata for PS4 8. Momotaro Dentetsu 2017 Tachiagare Nippon!! for 3DS 9. Yokai Watch Sukiyaki for 3DS 10. 1-2 Switch for Switch (Yin-Poole, 2017:internet)
South Korea	17m (Nevena, Žarko & Aleksandar, 2007:1)	Mobile gamers aged between 21 and 35 years (Newzoo, 2017f:internet)	43% Female mobile gamers and 57% male mobile gamers (Newzoo, 2017f:internet). 86% Males and 62.6% females have game experience (Reimsback-Kounatze, C. & Wunsch-Vincent, 2010:18)	• Online games (38.7%) • Mobile games (33.1%) • PC Games (14.5%) (Korea Creative Content Agency [KOCCA], 2013:24) The South Korean video-game market is dominated by PC platform revenues (PwC, 2015c:1)	• RPG • RTS • Business/construction/training • Simulation • First-person shooters (FPS) • Sport • Web board (KOCCA, 2013:27).	1. Overwatch 2. League of Legends 3. FIFA Online 3 4. Lineage 5. Sudden Attack 6. World of Warcraft 7. Dungeon Fighter 8. Warcraft 3 9. Blade and Soul 10. Starcraft (Romin, 2017:internet)
Germany	34.3m (BIU, 2017:11)	Average age of 35 years (BIU, 2017:10)	53% Male 47% Female (BIU, 2016:internet)	• PC (18.4m players) • Smartphones (17.2m players) • Consoles (15.6m players) • Tablets (11.5m players) (GTAI, 2017:1)	• Shooter • Adventure • RPG • Sport (VGChartz, 2017c:internet)	1. Horizon Zero Dawn 2. The legend of Zelda: Breath of the wild 3. Resident Evil VII 4. Pokemon Sun/Moon 5. Mario Cart 8 Deluxe 6. Grand theft Auto 5 7. Tom Clancy's Ghost Recon: Wildlands 8. FIFA 2017 9. Crash Bandicoot N. Sane Trilogy 10. For Honor (VGChartz, 2017c:internet)

United Kingdom	32.4m (Ukie, 2017: internet)	Between ages 6 and 64 years (Interactive Software Federation of Europe [ISFE], 2018:1-2)	57% Male 43% Female (Ukie, 2015:16)	• Smartphones and mobile devices (iOS and Android) • Windows desktop and MAC • PS4 and Xbox One (The Independent Game Developers' Association [TIGA], 2016:9)	• Action • Adventure • Arcade • Puzzle/trivia • Strategy • Racing • Simulation • Sports • Educational (TIGA, 2016:9)	1. Grand Theft Auto V 2. Tom Clancy's Ghost Recon: Wildlands 3. Horizon Zero Dawn 4. FIFA 17 5. Call Of Duty: Infinite Warfare 6. Resident Evil 7 biohazard (Metro, 2017:internet)

Source: Researcher's own compilation

It is evident from Table 4.3 that the majority of gamers are males in their 20s and 30s. Personal computer (PC) gaming seems to be the most popular type of gaming platform, followed by mobile gaming and console gaming. Action, adventure and role-playing games appear to be the most favoured genres among gamers worldwide.

Other demographic information on gamers, starting with the US, reveals that there is a rise in female gamers from a 44% share of the market in 2015 to 50% in 2016 (see ESA, 2015:3, 2016:3). Fifty-two percent (52%) of American gamers prefer to make digital purchases and 48% retail (ESA, 2015:12). In the UK, however, there is equal demand for retail and digital games (Ukie, 2015:internet). Research by the ESA (2016:3) on the US also reveals that the frequent American gamer who plays multiplayer and online games plays 6.5 hours per week online (ESA, 2016:3). Among the most frequent American gamers, 50% are familiar with eSports, while 55% are familiar with VR and 40% of those familiar with VR intend to purchase VR somewhere along the line (ESA, 2016:3).

Referring to eSports and VR, both these areas are becoming increasingly popular and important in Germany (BIU, 2017:20). It is expected that the German eSports market is expected to grow to EUR 130 million by 2020 which currently sits around EUR 50 million. The VR market in Germany is also growing substantially, with almost one in two of all internet users (46%) aware of VR and one in three users (32%) intending to use VR for gaming in the future (BIU, 2017:20). When looking at a broader Europe (UK, Germany, France and Spain), gamers between ages 25 and 35 years play about 6.2 hours per week whereas those between ages 45 and 64 play 7.5 hours a week (Ipsos Connect, 2017:2).

As for South Korean gamers, male gamers spend about 141.4 minutes per day during weekdays playing games, which is on average 23 minutes longer playtime than that of female South Korean gamers (KOCCA, 2013:23). Much of their time is spent playing mobile and online gaming, with role-playing and casual games being the most popular genres (KOCCA, 2013:29, 31). A study undertaken by KOCCA (2013:28) revealed that the most important reason for South Korean gamers to choose a game is 'genre' (46.2%), followed by 'content/material/background' (19.1%) and 'recommendation of game users'/ recommendation by gamers. Other reasons identified for choosing a game included 'characters', 'production company', 'graphic/sound' and 'Significance/Educational value' (KOCCA, 2013:28). Reasons of American gamers for choosing games include an interesting story/premise (22%), price (15%), word of mouth (recommendations) (11%), continuation of a game series (10%), familiar from past experiences (8%) and quality of graphics (7%) (ESA, 2015:12). In both countries it seems that story, recommendations, familiarity and graphics play a deciding role. Another similarity South Korea shares with the US, as well as with Germany, is the growing trend which is eSports in the country (KOCCA's, 2013:21).

eSports, mobile gaming, online gaming and VR seems to be a recurring theme in today's gaming community as opposed to past trends focusing on console gaming. A reason for this, according to Langlotz *et al.* (2008:30), is that the console market reached its maturity phase back in 2007/2008. There is even signs of a decline in modern console unit sales compared to the previous generation of consoles (Barder, 2017:internet). One of the biggest culprits leading to this decline is the rise of mobile gaming and the emergence of new markets (Barder, 2017:internet).

In the past, many people associated video games with children, but today many new markets have adopted this medium as a form of entertainment. A study by Nielson Games (2008:76) shows this whereby a broad spectrum of professions in Europe was identified playing games, ranging from students (part-time/full-time) (25%), specialists/technicians

(lawyers, nurses, doctors and pharmacists) (10%), administrative/public workers (8%), services (trading, bank, insurance etc.) (7%), unemployed (6%), sales-related workers (4%), management (4%), entrepreneurs (4%), freelancers (2%) housewives (not employed and part-time employed) (5%) to other occupations (19%). What makes these results interesting is the fact that many gamers are highly educated, busy with their studies or employed in specialist positions. These results also prove that games are not played by children only or are specific to certain social groups (see Kowart & Oldmeadow, 2012:2).

4.6. Motives of video gamers

The previous section leads to the question: if so many people of various ages, genders, and occupations play games, what is it that motivates people to play games? Obviously many different video games exist and can appeal to many different types of people. The same goes for people who do not play games as they too have many different reasons for not doing so. However, seeing that games are played or perused for many different reasons and personal interests, it is important to evaluate the factors that lead to the initiation thereof. The following section discusses the self-determination theory which is central to understanding gamers' motivations as well the findings from the previous research efforts pertaining to gamers' motives.

4.6.1. Self-determination theory for playing video games

Why does one play video games? The immediate and most obvious response is usually 'because it is fun'. Indeed, video games can be fun but can also evoke a remarkable amount of goal-directed behaviour (Przybylski, Rigby & Ryan, 2010:155). Unlike activities engaged for external reward (e.g. work for money), the appeal of video games is inherent to the experience it provides (Przybylski *et al*., 2010:155). This is not to say there are no external reasons for playing video games. According to Ryan and Deci's (2000a:70-71) Self-Determination Theory, activities that are pursued for the sake of it or to obtain inherent satisfaction are considered 'intrinsically motivated', whereas those pursued with a desired end-state or to avoid an indifferent/aversive outcome is understood as 'extrinsically motivated'. The Self-Determination Theory (hereafter referred to as SDT) is an approach to human motivation and personality, investigating the inherent growth tendencies and psychological needs that form the basis of self-motivation and personality integration (Ryan & Deci, 2000a:70). Although researchers refer to intrinsic motivation as an inherent quality, the enhancement and maintenance of this motivation can be depended on social environmental conditions (Ryan & Deci, 2000a:71). According to Riley (2016:2), the Cognitive Evaluation Theory (CET) addresses the social and environmental factors that facilitate versus undermine intrinsic motivation.

The Cognitive Evaluation Theory (CET) is a popular sub-theory of SDT and is one that has guided much research on intrinsic motivation in sport and leisure domains (Przybylski *et al.,* 2010:155). An example of this can be seen in Ryan, Williams, Patrick and Deci's (2009:107) study on the cognitive evaluation theory and the impact of autonomy and competence support in promoting intrinsic motivations to participate in sport and physical activity. Furthermore, the CET, in particular, focuses on the fundamental needs for competence and autonomy (Ryan & Deci, 2000a:70). Firstly, the theory argues that a social-contextual event (e.g. positive feedback, communications, and rewards) that bring about feelings of competence during an action can enhance intrinsic motivation for said action (Ryan & Deci, 2000a:70). Secondly, feelings of competence will not enhance intrinsic motivation unless it is accompanied by a sense of autonomy - self-determined, independent, freedom and self-governed behaviour (Gagné & Deci, 2005:332). Therefore, according to CET, people must experience both competence/efficacy and autonomy for intrinsic motivation to be evident (Ryan & Deci, 2000a:70).

According to SDT, satisfaction of these two needs is compulsory for internalisation to operate effectively, but a third basic need, relatedness, is also crucial for internalisation (see Baumeister & Leary, 1995:497). Relatedness is a feeling of connection and support (Deci & Ryan, 1985:43). It is also hypothesised that intrinsic motivation is more likely to flourish and gain support over a longer lifespan by a sense of security and relatedness (Ryan & Deci, 2000a:71). Competence, autonomy and relatedness are considered the central tenant of the self-determination theory (Ryan & Deci, 2000a:71; Kasser & Ryan, 1999:937; Sheldon & Filak, 2008:267). A study conducted by Sheldon and Filak (2008:279) identified autonomy, competence, and relatedness as reasons for interest and sustained participation in a non-digital game-based learning context.

Contrary to belief, intrinsic and extrinsic forms of motivations are not additive and have differing influences on individuals engaging in the same activity (Przybylski *et al*., 2010:155). In fact, factors that can enhance intrinsic motivation such as rewards, punishment, physical acknowledgment, self-esteem pressures or evaluation can typically undermine intrinsic motivation (Deci, Koestner & Ryan, 1999:627). Ryan and Deci (2000b:56) stated that compared to pursuing activities for reward purposes or other extrinsic reasons, intrinsically motivated actors lead to greater enjoyment, more creativity, demonstrates more cognitive flexibility and information processing and can incur greater psychological and physical health benefits. For these reasons, Przybylski *et al*. (2010:155) proposed that motives for playing video games can be based on the principles of CET and SDT that have been applied to the study of intrinsically motivated behaviours. In terms of psychological needs, Przybylski *et al*.

(2010:155-156) found that video games are engaging based on their ability to maximise situational satisfaction of autonomy (e.g. self-initiated, self-directed or a sense of free choice), competence (appropriately challenged or optimally difficult challenges), and relatedness (e.g. cooperative interaction with other players or to compete with or against other players or share similar interests). Ryan, Rigby and Przybylski (2006:358) also found that games that promote autonomy, competence, and relatedness are more enjoyable and initiate a stronger desire for future play. In addition, psychological research has indicated that SDT is a fruitful means of examining how mechanics of games can contribute to engaging and pleasurable experiences (Conway & Elphinstone, 2017:57).

While SDT highlights the mechanics in games that can be augmented to provide satisfactory experiences, the level of autonomy, competence and relatedness can functionally differ from one game to another or have a different meaning from one player to the next (Conway & Elphinstone, 2017:57). The way a person interprets the game world, finds meaning in it or embodies him or herself in it can lead to different experiences of autonomy, competence and relatedness (Conway & Elphinstone, 2017:57). This means that embodying different social norms and actions in a game world than that done in the real world can enhance or detract from an experience. Players are often also forced to adhere to game rules and restrictions, with many games exerting in-game behaviours associated with external motivations such as gaining experience to level up or progress or to complete a task to receive a reward (to receive better equipment). Facets of such progression can be made meaningful if it urges the player to 'want' to do it rather than 'have' to do it (Conway & Elphinstone, 2017:57). For example, if a player needs to kill 20 enemies in a role-playing game (RPG) to face a boss enemy and progress, players might find it tedious and grind as it is something that has to be done, but if the defeating of 20 enemies provides one with a reward (i.e., a better sword) that aids your chances against the boss enemy and future enemies, more people would likely be motivated to do so.

It can thus be argued that players can embody different meanings from different game worlds, as well as create different meanings for different players or characters. Conway and Elphinstone (2017:57) explain this as follows: '...due to being inescapably embodied in a situation (one's Da '[thereness]'), one's world always has significance and is always understood in some way – hence Heidegger's term Da-Sein/Dasein (There-Being) to emphasise the fundamental role of (social, political, bodily) context in the interpretation of one's world'. Looking at this ontological position from a video-game world perspective, 'we can show how psychological needs as outlined by SDT can be met, or undermined, through specific design choices in digital games' (Conway & Elphinstone, 2017:57).

The more video games gratify the needs of SDT, the more enjoyable the experience will be (Oliver, Bowman, Woolley, Rogers, Sherrick & Chung, 2016:393). Hence it can be suggested that SDT's theorised needs for autonomy, competence and relatedness independently predict enjoyment and future game play (Ryan *et al*., 2006:344). These needs could also help predict 'game preferences, duration of gameplay, and post-game feelings of well-being' (Bock, Thind, Dunsiger, Serber, Ciccolo, Cobb, Palmer, Abernathy & Marcus, 2015:205). The relevance of SDT in this study thus provides a basis to why people would want to play video games, as it determines critical need fulfilling factors for enjoyment and future play. To an extent, SDT also co-aligns with Grooten and Kowert's (2015:83) perception of gamers, in that gamers are not merely players of video games but that they identify with it on a personal (autonomy or self-interest) and social (relatedness) level. It has also been suggested by Grooten and Kowert (2015:82) that an exploration of gamer identity may contribute to the understanding of how video games or gaming is tied to socialisation and the development of related competencies.

In conclusion, SDT is a widely popular theory explored by many research studies (Conway & Elphinstone, 2017; Oliver *et al*., 2016; Rogers, 2017; Ryan *et al.,* 2006; Uysal & Yildirim, 2016) to explain gaming behaviours and motives, but many other studies have also been undertaken that explore video gaming motives (Reid, 2012; Prensky, 2002; Przybylski *et al*., 2010; Worderer & Bryant, 2006). Consequently, an examination of previous research on motives for playing video games follows in the next section.

4.6.2. Previous research on motives for playing video games

The simplistic and stereotypical idea that gamers are addicts or aggressors ignore the fact that video games are played for a wide range of different reasons and motives (Yee, 2006:774). Intrinsic motivation or SDT (Ryan *et al*., 2006:358) and the 'flow' theory (Olson, 2010:182) are but two determinants that explain game-playing motives. The concept of the 'flow' refers to an optimal and very pleasing experience, whereby an individual's total involvement and concentration, as well as a sense of time distortion is involved (Lee & Tsai, 2010:604). Introduced by Csikszentmihalyi (1990:4), the flow theory was defined as:

> …the state in which people are so involved in an activity that nothing else seems to matter; the experience is so enjoyable that people will do it even at great cost, for the sheer sake of doing it.

In short, Olson (2010:182) describes 'flow' as a pleasurable state in which one is completely absorbed by a goal-driven activity (Olson, 2010:182). Matching the tempo and level of challenge of a game to that of a player's skills can increase the likelihood of achieving flow

(Annetta, 2010:107). According to Annetta (2010:107), only when a player is present, engaged and motivated to continue the game's challenge can a state of flow be reached. In addition, linking flow with SDT, the more a person is intrinsically motivated by an activity the more they will become engaged in that activity (Annetta, 2010:107). Higher levels of engagement and motivation can lead to 'flow'. Csikszentmihalyi (1990:55-56) identified eight characteristics that are recognisable (or required) to achieve a state of 'flow':

- A feeling of competence to successfully complete the activity,
- The player can concentrate fully on the activity,
- The activity has clear goals,
- Fast feedback is provided from the activity,
- The player is emerged or deeply involved in the activity,
- The player has a sense of control over the actions needed to perform the activity,
- Self-awareness disappears during flow, and
- An altered sense of time is apparent.

These eight guidelines can also serve as the basis for designing scaffolds within a game (Annetta, 2010:107). Moreover, they are considered reasons for participating in video games (Annetta, 2010:107).

Besides the use of motivational theories such as SDT and 'flow', other research endeavours based on reasons or motives for playing video games can be found in studies or reports by De Grove, Cauberghe and Van Looy (2016:105), ESA (2016:9), KOCCA (2013:23), Loffredo and Tavakkoli (2017:35), Mazurek, Engelhardt and Clark (2015:124-125), Nielson Games (2008:31), Olson, Kutner, Warner, Almerigi, Baer, Nicholi and Beresin (2007:81), and Yee (2006). These reports and studies are but a few examples of two decades' worth of research on video gaming motives, and as such do not represent all research done on this topic but should provide a general consensus on some of the motives. A summary of their findings can be seen in Table 4.4.

Table 4.4: Motives for playing video games

Authors	Title of study	Motives/reasons for playing
Yee (2006)	Motivations for play in online games	Achievement • Advancement (progress and status) • Mechanics (optimisation and numbers) • Competition (challenging others and domination) Social • Socialising (making friends and helping others) • Relationship (personal and find and give support) • Teamwork Immersion • Discovery (lore and exploration) • Role-playing (story-line, fantasy, roles and character history) • Customisation (appearances, accessories, and style) • Escapism (to relax, to escape from reality and to avoid real-life problems)
Olson *et al.* (2007:81)	Factors correlated with violent video-game use by adolescent boys and girls	• It is Fun • It is Exciting • Something to do when bored • Challenge of figuring things out • Compete to win • Helps to relax • Nothing else to do • Create my worlds • Learn new things • To forget problems • Let loose of anger • To 'MOD' (modify) games • Play with friends • Teach others to play • To feel less lonely • To make new friends
Nielson Games (2008:31)	Video gamers in Europe - 2008	• It is fun • Stress relief/to relax • To pass the time when I am bored • For the challenge of the game • Because it is exciting • To use my imagination • To socialise or play with others • To socialise or play with others specifically online • To make good use of spare time • To learn new things
KOCCA (2013:23)	2013 Guide to Korean games industry and culture: White paper on Korean games	• Because it is fun • To ease stress • To spend leisure time • To get along with friends • Habitability • Community in cyberspace

Mazurek *et al.* (2015:124-125)	Video games from the perspective of adults with autism spectrum disorder	• Stress relief • Fantasy/Immersion • Filling time • Social aspects • Compulsion • Fun and entertaining • Achievement/ challenge • Autonomy/Creativity • Story (a good story) • Graphics • Mental stimulation
De Grove *et al.* (2016:105)	Development and validation of an instrument for measuring individual motives for playing digital games	• Performance (expectation to perform well) • Agency (expectation to play according to own prefaces) • Status (being respected by other players • Sociability (play with or against other players) • Believability and emergence (believability of game environment) • Involvement (involvement with aspects in the game world) • Escapism (from routines) • Moral self-reaction (role-playing based on a comparison of one's own social or moral norms) • To kill time • Because it is a habit
ESA (2016:9)	2016 sales, demographic and usage data: Essential facts about the computer and video-game industry	**Reasons parents play video games with their kids:** • It is fun for the entire family • Because parents are asked to • Provides a good opportunity to socialise with their kids • It is a good way to monitor game content • They enjoy playing video games as much as their child does
Loffredo and Tavakkoli (2017:35)	Analysing motives, preferences, and experiences in video-game play	**Top six reasons** • Autonomy/exploration • Story • Customization • Social interaction • escapism

Source: Researcher's own compilation

What is evident from the table above is that many of the motives mentioned correspond with those identified by the SDT and 'flow' theory, such as the intrinsic motivation of joy, excitement and fun associated with playing games, or the social relatedness and sociability aspect of playing with or against others, as well as the performance, skill-building and challenge aspects presented by video games.

Alternatively, there are even reasons identified why people do not want to play games. This is especially true among non-gamers. Take for instance a report by Nielson Games (2008:32) for the Interactive Software Federation of Europe (ISFE) that revealed that

European non-gamers choose not to play games because they do not have time (40%), have no specific reason (28%), find games boring (13%), games are too expensive (8%), games are too violent (4%), games are meant for children (5%) and games are too complicated to play (3%). According to these results and Nielson Games (2008:32), the key obstacle lies in the shortage of time and a lack of clarity surrounding the value proposition of games among non-gamers and not so much the violence within games. Nielson Games (2008:32) suggests that one way to convert non-gamers to play games is by making them more accessible and provide games suited for short bursts of gameplay.

Other reasons why people might not be interested in playing games are based on the negative association attached to games. Mazurek *et al.* (2015:125) identified seven themes associated with what people disliked about video games, namely:

- **Negative game features:** Game glitches and poorly made games, long loading times, poor graphics, and voices that do not match lip movements and no auto-save points.
- **Negative social features:** Online cussing and swearing, criticising people on how they play, insulting messages, and new players frustrating advanced players based on skill differences.
- **Violence:** Violence depicted in video games, and violence also clashes with most religious values.
- **Difficulty:** Unrealistic or excessive difficulty, stupid hardness, and levels that get too hard too fast.
- **Addictive qualities:** Losing track of time, keeps you from responsibilities, and using time on games rather than spending time on more productive things or family.
- **Developer critique:** Disregard for sequels, lack of effort put into game development and games being treated more business-like than art-wise.
- **Sexual content:** The concerned amount of sexual content in games, objectifying women and the nudity presented by games.
- **Physiological responses:** Getting headaches, eye strain, and feeling nauseated or lazy.

Negative social behaviours and violence are some of the more recognised features found in behavioural research on playing video games. According to Gusho and Mitrush (2017:120), exposure to violent video games on adolescents could manifest into negative behaviours. Research by Laczniak *et al.* (2017:70) identified that repeated exposure to violence in video games can formulate aggressive cognitions or thoughts that lead to the development of

aggressive personality traits. Negative behaviours, such as non-compliance with social norms or a lack thereof, was also found in Harrington and O'Connell's (2016:654) study among children and adolescents who played violent games. Aggressiveness is another negative behaviour exacerbated by violence as found in Worth and Book's (2015:136) study on the 'Dimensions of video-game behaviour and their relationships with personality.'

Alternatively, the same study conducted by Worth and Books (2015:136) identified positive behaviours from playing social games such as the willingness to help others. While playing violent games can manifest in negative social behaviours, prosocial games can manifest in positive affective relationships, cooperation and sharing as well as empathy (Harrington & O'Connell, 2016:650). Harrington and O'Connell's study (2016:655) found that a positive and significant relationship exists between prosocial video-game use and dependent variables such as cooperation and sharing, the tendency to maintain positive affective relationships and empathy.

Contrary to beliefs or research results, Devilly, Brown, Pickert and O'Donohue's (2017) study on cooperative behaviour in gamers showed no significant differences between conditions on cooperative behaviours between regular gamers and multiplayer gamers and that of novices or solitary gamers. Their findings also suggest that 'violent media exposure does not appear to produce reductions in prosocial or cooperative behaviour' (Devilly *et al.,* 2017:208). In addition, Devilly *et al.* (2017:218) proposed that researchers studying the effects of gaming should 'broaden their theoretical scope from the social learning paradigm applied to all people – irrespective of personality, history or vices.' This will allow for the appropriate measurement of behaviours among non-gamers and gamers (all ages and ethnicities), as well as provide more sound evidence as to whether or not youth violence can be correlated with violence in games. According to Devilly *et al.* (2017:218), currently no sound evidence can be traced that such a link exists, since little to no research has comparatively studied both sides on equal ground and measure.

Whether or not video games can induce pro-social behaviour or be the cause of violent behaviour, what is clear however is that many video games can produce beneficial traits. A study by Velez (2015:490) on social benefits of cooperative video-game play have emphasised that social video-game play can help forge social relationships as well as improve cooperative behaviours such as helping teammates during gameplay. Studies by Green and Bavelier (2015:106) and Schenk, Lech and Suchan (2017:213-214) revealed that many video games hold the potential of fostering cognitive training such as problem-solving, adaptable thinking, improved pattern-recognition, quickened response times, and educating,

as well as teaching the meta-skill of attentional control by demanding a highly focused attentional state from the player. Health benefits are another unusual benefit of some games. Games such as Pokemon Go encourage players or 'trainers' to go outside or even to walk long distances to hatch digital eggs into new Pokemon (Kaczmarek, Misiak, Behnke, Dziekan & Guzik, 2017:357). While games such as Pokenmon Go merely teases the idea of health benefits, games such as My Fitness Coach series or Active series on Nintendo's Wii console is specifically designed to engage the player in physical activity. This is evident in Bock *et al.'s* (2015:204) study which revealed that exercise video games on the Wii can increase cardiovascular fitness, improve body composition and maintain physical activity. Another study by McNulty, Thompson-Butel, Shiner and Trinh (2013:214) identified improvement of physical movement among stroke patients with low and very low movement ability who played exercise video games. Furthermore, since the SDT is also used to explain exercise behaviours, Bock *et al.* (2015:205) suggest that it may be used to explain the motivations behind playing exercise video games. For this reason, exercise video games can be engaging, enjoyable and can lead to sustained physical activity participation (Bock *et al.,* 2015:205). It is therefore not unsolicited to presume that people can be motivated to play video games based on their health (see Bock et al. (2015:205), social (see De Grove *et al*., 2016:105; Mazurek *et al*., 2015:124-125), cognitive (see Green & Bavelier, 2015:106; Nielson Games, 2008:31), psychological and emotional benefits (see Granic *et al*., 2014:66; Gunawardhana & Palaniappan, 2015:1728-1729).

Then again, 'overdoing it could have disastrous consequences' as stated by Colin Webster (as cited by Nkonkobe, 2017:internet), President of Mind Sports South Africa, on the benefits of gaming to the mind. Webster (as cited by Nkonkobe, 2017:internet) also went on to say:

> I'm sure we have heard many times that [internet] games are the devil but that is just not true at all. We cannot speak ill about gaming just because of a few individuals who lack control. The world is becoming very tech-savvy and we should all want to be a part of it, especially our children,...
>
> The problem is not internet gaming at all. Several studies have shown that gaming increases intelligence. It has even been introduced to schools because it has been found to improve concentration and boost general morale among pupils,..

A study by Kritzinger (2017:33) suggests that gaming in South Africa can be used by teachers and parents to improve a learner's information and communication technology skills, as well as teach them about cyber-safety.

With Webster's statements and Kritzinger's study in mind, the following question is raised: If video gaming can benefit the youth, among many other social groups, why is there such a lack of research on this industry in South Africa? A primary aim of this study is to provide research on South Africa's video gaming industry (events sector) and to help fill the literature gap on the country's video gaming market. Additionally, to conclude the literature review of this chapter, the following section provides an overview of research done on South Africa's video gaming industry.

4.7. South Africa's video gaming industry

It is undeniable that video gaming in South Africa is huge and growing. If market projections are of any indication, South Africa's video gaming market might be worth R5.404 billion by 2021, which is more than double that of the industry's size back in 2016 (R2.637 billion) (Statista, 2018a:internet). In addition, for an industry that employs less than 300 people locally, South Africa's game development industry was responsible for a R100-million in revenue back in 2015 (Collins, 2017:internet). Research by Interactive Entertainment South Africa (IESA, 2016:3) shows that this amounts to an 85.6% growth increase from the previous year.

Moreover, IESA's (2016:3) research on South Africa's game development industry revealed that there were 31 active game development companies in 2015 which directly contributed to 255 jobs and the release of a total of 103 games. According to IESA (2016:8), South Africa's video gaming industry is still unsurprisingly immature, with many of its studios being active less than 5 years (72%). The majority of these studios can be found in Cape Town and Johannesburg (IESA, 2016:6). Many of these studios operate in the entertainment sector (815) - games played for entertainment, followed by the serious games sector (11%) - games meant to teach something, and advertising sector (8%) - games made to promote a brand or product (IESA, 2016:13).

The preferred development platform for local game developers seems to be PC (64%), followed by iOS (23%), game consoles (PS4 and Xbox) (8%) and Android (5%). Developing games for PC and mobile devices makes sense since the majority of gamers in developed economies prefer these platforms (c.f. 4.5). Developing games for mobile devices in South Africa is also understandable since mobile phones are more readily available than other gaming platforms, especially in poorer communities (Walton & Pallitt, 2012:347). Social/casual game revenues, made popular by Smartphones, have even surpassed traditional gaming revenues in 2017 (PwC, 2017:77). Traditional gaming in this scenario refer to PC and console gaming. According to revenue projection on South Africa's video

gaming industry by PwC (2017:77), social/casual gaming will be worth more than double in revenues than that of traditional gaming (R3.7 billion vs. R1.6 billion) by the year 2021. Furthermore, console and PC gamers are shifting towards digital sales and online/microtransaction purchases as compared to physical purchases (PwC, 2017:77). This is by and large the result of increased accessibility to internet in the country (Big Fish Games, 2018:internet). Other statistics by PwC (2017:78) on South Africa's video gaming market reveals that the console-player base has remained very stagnant over recent years (2012-2018) and will remain so for the coming years (2019-2021), while the PC-gamer base is marginally growing each year and the mobile-gamer base is booming.

Concerning the PC platform, almost half of the country has negligible home access to PCs, while Sony PlayStations are mostly owned by high-income groups (Walton & Pallitt, 2012:350). An All Media and Products Study (AMPS) in 2011 by the South African Audience Research Foundation (SAARF, 2011:22) found that higher-income groups are more likely to own a PlayStation, whereas owning a cell phone or desktop computer is more practical among various income groups. This might explain why developing for PC games would be more feasible in South Africa than say developing for consoles. Yet, in 2016 console game revenues remained higher than PC game revenues (R754m vs. R621m) in South Africa (PwC, 2017:78). However, this revenue gap will evidently shrink, even if console revenues still surpass PC revenues by the year 2021 (projected R812m vs. R781m) (PwC, 2017:78). Nonetheless, sales and revenue statistics do not explain South African gamer behaviours or why sales of local games for entertainment in the South African market only accounted for 0.07% of the game development industry’s revenue in 2015 (see IESA, 2016:15).

Unfortunately, little research has gone into investigating the South African video gaming market. Fortunately, there are studies that do identify some gamer characteristics and demographic profiles in South Africa. A study by Walton and Pallitt (2012:350) suggested that older age groups (35+) are more likely to be involved in mobile gaming than on PC or consoles and that younger males (15-24) are more likely to play console games on a daily basis than are younger females. A study by Goon, Nsibambi and Chebet (2016:439) titled: 'Time spent in sedentary activities in a paediatric population in Pretoria Central, South Africa', identified that primary school boys in Pretoria spend more time playing computer games than do their female counterparts. Vizeum’s Consumer Connection Survey (as cited by Hall, Watson & Kitching, 2017:14) revealed that the majority of console and PC gamers in South Africa are black (estimated at around 78%) followed by white gamers (11%), coloured gamers (8%) and Indian gamers (3%). The survey also identified that more males (56%) play on PC or consoles than females (44%), but that females present a higher proportion

(54%) than males (46%) when it comes to mobile play. Furthermore, the survey results revealed that most gamers playing on PC, consoles and mobile devices were aged between 15 and 24 years and secondly between 25 and 34 years.

Besides the above-mentioned findings, not much else has been done to profile South African gamers (market segmentation, motives for playing or gaming behaviours). The same applies to academic research on video gaming in South Africa. There are however some exceptions, such as Steenkamp and Rudman's (2013) study on video games as a tool in tertiary education, a research-article published by the School of Oriental and African Studies in 1998 on 'Copyright and Video Games in South Africa', and Walton and Pallitt's (2012) study on games, literacy and inequality in consumer childhoods, but it is few and spars.

4.8. Conclusion

Taken as a whole, the video gaming industry is massive, growing and evolving. It has moved beyond mere video-game sales, with roots in the toys and merchandise, books and magazines, movies and soundtracks and events sector (Ukie, 2017:internet). Riding on the back of new technological advances in media consumption and information technologies, games today are played by many markets on many devices with many types of experiences. This means that games have shifted from mere traditional play on PC and consoles to playing on handheld and mobile devices, including new experiences found in augmented reality (AR) and Virtual reality (VR). New platforms and ways to play, particularly on mobile devices, introduced many different audiences to the medium, seeing shifts from mostly boys playing games towards equal play among both genders, as well as gamers found in many different age groups and occupations. Faster and more accessible internet has also changed the way games are distributed and consumed with digitalised game sales leading the future charge over physical game sales.

While early games might have been played in the past because of its fun or interactive factor, it has since grown into something more social, personal and cultural, leading to the incorporation of theories such as Self-Determination Theory (SDT), Cognitive Evaluation Theory and 'Flow' Theory to explain gaming motives and behaviours. Besides these theories, many other research studies have been performed to identify why video games are played (see De Grove *et al.,* 2016; ESA, 2016; KOCCA, 2013; Loffredo & Tavakkoli, 2017:35; Mazurek *et al.,* 2015; Nielson Games, 2008; Olson *et al*., 2007; Yee, 2006). Understanding the gaming community and their behaviours is key to planning, growing and adapting to this evolving industry. Unfortunately, little has been done to research this industry in South Africa even though it is one of the fastest, if not the fastest, growing

industry in South Africa. Therefore, this chapter served as a literature analysis of the video gaming industry, and provided insight into South Africa's video gaming industry and its literature gaps on market research, which this study aims to fill.

The next chapter serves to fill in some of the literature gaps concerning the video gaming market in South Africa and provide information on local video gaming exhibitions and events from a supply- and demand side – as analysed in the previous chapter. This is because the following chapter provides the methodology and results to this study based on the visitor survey and interviews conducted from questions formulated from the literature chapters of the current study.

Chapter 5: Method of research, multivariate analysis and results

5.1 Introduction

This study aims to assess video gaming events in South Africa from a supply and demand perspective. The purpose of this chapter is to discuss the methodology used to obtain and analyse the demand and supply-side data used in this study, including the results drawn from said data. Demand-side data for this study was gathered using a newly developed questionnaire that was self-administered to visitors at the 2016 rAge Expo in Johannesburg using a convenience sampling method. Supply-side data was obtained using telephonic interviews conducted with event organisers with regard to their respective video gaming-related events. This was done over a period of two months between the months of March and April in the year 2018, after which the recordings were transcribed. Therefore, both qualitative and quantitative research methods were applied for conducting the demand- and supply-side analysis. With a mixed-method approach, integrating both qualitative and quantitative methods can provide a better understanding of the research problem and provide the researcher with more breadth and depth of understanding, while offsetting the weaknesses of using only one approach (Dörnyei, 2007:174). As such, this chapter will be divided into two sections. The first section, Section A, will assess the video gaming industry from a demand side (visitor survey) and the second section, Section B, will assess it from a supply side (telephone interviews).

Section A: Assessing video gaming events from a demand side

The following section examines the demand-side sampling method and survey, the development of the visitor questionnaire, the statistical analyses used for producing the results, and the results drawn from the data collected.

5A.2 Sampling method and survey

The visitor questionnaire was administered at the 2016 rAge Expo held at the Ticketpro Dome, Randburg, Northern Johannesburg on the 7th and 8th of October. The rAge Expo was selected for the visitor survey due to it being South Africa's biggest gaming event, attracting between 33 000 and 35 000 visitors each year (rAge Expo, 2012:internet, 2015:internet, 2016a:internet). Additionally, the event covers many different video gaming platforms and plays host to a large variety of gaming-related activities that include sports tournaments, retail exhibits, cosplay, table-top games, a LAN area (computer network area that

interconnects computers), game and technology demo booths, artist stands and many more. Other smaller video gaming events in South Africa do not cover as much activity or attract as many visitors in one single event.

The Expo started on Friday with show times being from 10:00-18:00, and from 09:00-18:00 on Saturday and 10:00-16:00 on Sunday. The distribution of the questionnaires started an hour into the event each day, providing the visitors with time to explore booths and potential spending behaviour to occur. A non-probability sampling technique called convenience sampling was followed whereby subjects got selected based on ease and accessibility (Explorable.com, 2018:internet). Furthermore, the target population also met certain practical criteria for convenience sampling such as being gathered in geographical proximity, available at a certain time, and showed willingness to participate (Dörnyei 2007: 129). At the event itself, the questionnaires were distributed by fieldworkers at different sections of the event, including the NAG LAN, demo booths, retail booths and other areas within the Ticketpro Dome. This enabled fieldworkers to conveniently select and obtain information on the available subgroups of visitors. For example, if an attendee did not pay for the NAG LAN, said attendee was not allowed to enter that zone. Access to all zones allowed for a more equal selection and distribution of questionnaires among the visitors. By doing this, some degree of consecutive sampling took take place whereby all accessible subjects were sought after as part of the sample. Respondents were approached with an explanation of the study, after which the questionnaire was distributed to willing participants. A total of 420 questionnaires of the 450 distributed questionnaires were fully completed to be included for analyses. This resulted in a 93% level of completion. The survey was completed on the Saturday at 18:00 hours.

The sample size of 420 (n) participants is considered a sufficient representation of the event's population. A population being ‘a group of potential participants to whom you want to generalise the results of a study’ (Salkind, 2009:89). According to the sample size calculator, it is determined that a sample size of 380 (n) from a population of 33 000 (N) and above with a confidence level of 95% would yield a margin error of 5% (Creative Research Systems, 2012). According to the Expo’s website, there were 34 693 visitors at the 2016 event in Johannesburg (rAge, 2016a:internet). If assumed that the standard error = 0.05, a population size of 33 000 (N) would require a sample size of 380 (n) (Krejcie & Morgan, 1970:607). A population size of 35 000 (N) and above would also yield the same results; thus making a sample size of 420 (n) representative.

5A.3 Development of the questionnaire: Demand-side analysis

A new questionnaire were developed by the researcher for conducting the visitors' survey since no standardised measuring instrument currently exists for doing a demand-side analysis at video-game events. The complete version of the visitors' questionnaire is shown in the Appendix A. The following section examines this newly developed questionnaire, from its layout to its reliability and validity.

5A.3.1 The layout of the questionnaire

Baker (1999:162) contends that a good questionnaire should provide the necessary decision-making information to reach the objectives of the study, as well as provide decision-making information for management. As such, the questionnaire was formulated using existing information and the assistance from the event organisers. The structure of the questionnaire adapted the questioning format of surveys and industry reports done on festivals and exhibitions by Tourism Research in Economics, Environs and Society (TREES, 2012; 2013a, 2013b; 2015; 2016a; 2016b), North-West University as well as published academic articles (see Manners, Kruger & Saayman, 2015, 2016; Kruger, 2009; Kruger & Saayman, 2013, 2016; Kruger, Saayman & Saayman, 2009). This provided a tried and tested formula for constructing the questionnaire. The questionnaire was divided into five sections, namely Section A: Demographic profile, Section B: Gaming and purchase behaviours, Section C: Motives for playing video games, Section D: Motives for attending rAge, and evaluation of the event. This division of sections provided a logical sequence of questioning, first identifying the profile of visitors, then their gaming behaviours and finally information on the event itself. This layout was followed since, as explained by Lamb, Hair, McDaniel, Boshoff and Terblanche (2004:262), questions should be arranged in a manner that is logical. Below is a detailed description of what each section measured.

Firstly, Section A captured the profile of attendees including their age, gender, home language, relationship status, province of residence, level of education, occupation, income level, type of ticket purchase, place of ticket purchase, group size, spending at the event, previous attendance at the event and attendances at other video gaming-related events.

Secondly, Section B captured general gaming and purchase behaviour information which included aspects such as the age at which respondents first started gaming, their first gaming device, gaming devices currently being used, preferred gaming device, type of game purchases, money spent on hardware and software, the type of gaming experience they prefer, the genres of games being played, important playing-related aspects, time spent playing games, type of gamer identification and favourite video gaming titles. Question 24

identified the importance of key aspects when playing a video game, measuring seven items on a 5-point Likert scale, where 1 = Not important at all, 2 = Less important, 3 = Neutral, 4 = Important and 5 = Extremely important (absolutely essential). The 5-point Likert scale was an appropriate attitudinal measurement scale and the most commonly used Likert scale to measure a respondent's level of agreement with a statement (Bertram, 2007:1; Boone (Jr.) & Boone, 2012:1).

Thirdly, Section C identified the motives as to why attendees play video games. Respondents were asked to rate 31 items in Question 28 as reasons for playing video games following a 5-point Likert scale, where 1 = Strongly disagree, 2 = Disagree, 3 = Undecided (Neutral), 4 = Agree and 5 = Strongly agree.

Lastly, Section D explored aspects of the Expo itself and included event-related questions such as the year attendees first heard about the event, why they attend the event, how they heard about the event and how they evaluate aspects of the event. Motives for attending the Expo (Question 32) and visitor's evaluation of the expo (Question 33) were measured using a 5 point Likert scale, where 1 = Strongly disagree, 2 = Disagree, 3 = Undecided (Neutral), 4 = Agree and 5 = Strongly agree. Twenty-two (22) items were included for Question 32 and 19 items for Question 33. Section D also included questions related to creativity resulting from playing video games such as whether or not attendees consider themselves to be creative and, if so, how video games inspire them to be creative. These questions tie in with Chapter 2 on creative industries as a result of creative content consumption and link video-game play with creativity development (Henion & Jackson, 2011:internet).

5A.3.2. Reliability and validity of the questionnaire

It is important for data to be reliable and for the measuring instruments to be valid. Tustin, Ligthelm, Martins and Van Wyk (2005:342) propose four significant steps for designing and validating a questionnaire, namely Step 1: Content validation, Step 2: Face validity, Step 3: Construct validity and Step 4: Reliability. Content validation, the first step towards the validation of a questionnaire, is undertaken to ascertain whether the content of the questionnaire is appropriate and relevant to the purpose of the study (Parsian & Dunning, 2009:3). To validate the content used to construct the questionnaire, see Table 5.1. The table identifies the type of questions used within each section based on and adapted from relevant sources. In addition, the gathering of socio-demographic and visitor satisfaction information was made easy by accessing event literature, especially the use of industry reports for the construction of the questionnaire and its questions. Being a gamer with years of gaming experience on many different genres and platforms, personal insight and research

performed by die researcher also aided in the layout of questions based on gaming and purchase behaviours.

Table 5.1: Types of interpretation variable included in the questionnaire

Questions	Related literature consulted
Section A: Demographic profile	
Questions regarding the socio-demographic profile including gender (Question 1), date of birth (Question 2), home language (Question 3), marital status (Question 4) province of residence (Question 5), level of education (Question 6), occupation (Question 7), residency (Question 9a) and nights stayed at destination(Question 9b).	Botha and Slabbert (2011); Crompton and McKay (1997); Kim, Suh and Eves (2010); Kruger and Saayman (2012a, 2012b, 2016); Kruger and Saayman (2018); Kruger, Saayman and Ellis (2012); Kruger, Scholtz and Saayman (2012); Kruger, Scholtz, Saayman and Saayman (2012); Tkaczynski and Toh (2014)
Questions regarding the socio-economic profile and spending behaviours including income (Question 8), type of ticket purchased (Question 10), place of ticket purchase (Question 11), people travelling in groups and people paid for in group (Question 12a and 12b) and spending at the event (Question 13).	Crompton and McKay (1997); Kim, Suh and Eves (2010); Kruger (2009); Kruger and Saayman (2016); Kruger, Saayman *et al*. (2012); Kruger, Saayman and Saayman (2009); Viljoen, Kruger and Saayman (2017)
Questions regarding previous attendance (Question 14) and attendances at other related events (Question 15).	Kruger and Saayman (2013); Kruger and Saayman (2016)
Section B: Gaming and purchase behaviour	
Questions regarding age started playing games (Question 16), first gaming device (Question 17), current devices used for playing games on (Question 18a) and preferred gaming device (Question 18b)	Entertainment Software Association (ESA, 2015, 2016); Germany Trade & Invest (GTAI, 2017); Harding-Rolls and Cui (2017); PricewaterhouseCoopers (PwC, 2015a); The Independent Game Developers' Association (TIGA, 2016)
Information on type of video-game purchases made regularly (Question 19), software sales (Question 20) and hardware sales (Question 21).	PwC (2017)
Information on the type of gaming preferences and gaming genre preferences (Question 22 and 23).	Big Fish Games (2013); ESA (2016); Korea Creative Content Agency (KOCCA, 2013); VGChartz (2017b);TIGA (2016); Yin-Poole (2017)
Aspects important for choosing and playing games (Question 24).	ESA (2015); KOCCA (2013)
Question on time spends playing games and self-identification gamer type (Question 25 and 26).	Bundesverband Interaktive Unterhaltungssoftware (BIU, 2017); Herodotou, Kambouri and Winters, (2015); Ipsos Connect (2017); Poels, Annema, Verstraete, Zaman and De Grooff (2012)
Information on popular game titles(Question 27)	Custer (2017); Gamespot (2017); Metro (2017); VGChartz (2017b)

Section C: Motives for playing video games	
Information on motives for playing video games (Question 28).	De Grove, Cauberghe and Van Looy (2016); ESA (2016); KOCCA (2013); Loffredo and Tavakkoli (2017); Mazurek, Engelhardt and Clark (2015); Nielson Games (2008); Olson, Kutner, Warner, Almerigi, Baer, Nicholi and Beresin (2007); Yee (2006)
Section D: Motives for attending rAge and event evaluation	
Information on creativity and creativity as a result of playing games(Question 29a and 29b)	Daniel (2015); Duin and Thoben (2014); Henion and Jackson (2011)
Source of event information on the event prior to the event (Question 30 and 31).	Kruger and Saayman (2013, 2018)
Information on motives for attending expositions and consumer shows (Question 32).	Blythe (1999); Chung, Koo and Kim (2014); Crompton and McKay (1997); Godar and O'Connor (2001); Kruger, Saayman *et al.* (2012); Lee, Yeung and Dewald (2010); Manners, Kruger *et al.* (2015); Nayak and Bhalla (2016); Tkaczynski and Toh (2014); Wei and Lin (2015)
Information on event evaluation from a visitor's perspective (Question 33).	Manners (2014); Manners, Kruger *et al.* (2015), Manner *et al.* (2016); Kruger and Saayman (2012a, 2012b, 2018); Kruger, Saayman and Slabbert (2015); Kim, Lee and Sirgy (2014); Saayman, Kruger and Erasmus (2012); Tanford and Jung (2017)
Question on future visitation and recommendations (Question 33 and 34).	Kruger and Saayman (2013, 2016)

Source: Researcher's own compilation

Secondly, face validity indicates that the questionnaire appears to be appropriate to the purpose of the study and the content area (Parsian & Dunning, 2009:3). The Statistical Consultation Services at the North-West University, Potchefstroom advised on the formulation of the statements and the measuring scales used in the questionnaire. The questionnaire also included 5-point Likert scale questions in Sections B, C and D to validate attitudinal responses towards measuring levels of agreement or importance of a list of items. In addition, the questionnaire was sent to the event organisers for any revisions prior to the event taking place, as well as a panel of research experts within the TREES Research Unit at the North-West University, Potchefstroom. Besides the request of some technical and language editing changes, no additional revisions were required. The validity of the measurement instrument used to design the questionnaire is thus supported by the above-mentioned subjective arguments and judgments, referring to face validity or consensus validity (Aaker, Kumar, Day & Lawley, 2005:208).

Thirdly and fourthly, construct validity (determine the degree to which a test measures what it claims/purports to be measuring), and Reliability (to test the reliability of the identified factors) will be discussed in the section below.

5A.4 Statistical analysis and results

The data was captured in Microsoft Excel© and analysed using SPSS Version 25 (2018). The cluster analyses were performed in Statistica Version 13.3 (StatSoft, Inc., 2018). The analysis was done in four stages: a descriptive analysis to profile the respondents; exploratory factor analyses, two cluster analyses to segment the different profile of gamers and respondents to the Expo, and lastly an analysis of significant differences between the market segments and socio-demographic and behavioural characteristics. The statistical analyses and results are consequently discussed.

5A.4.1 Descriptive analysis

The following section provides a descriptive analysis of the data collected from the visitor survey. This includes descriptive results on the profile of visitors (Section A), their gaming and purchase behaviours (Section B), motives for playing games (Section C), and motives for attending and their event evaluation (Section D). The results found in Sections A, B and C of the questionnaire can also provide a representative profile of South African gamers, and their gaming and gaming-related purchase behaviours. The reason for this assumption is that the rAge Expo in Johannesburg attracts the largest and most varied crowd of South African gamers under one roof. Also refer back to heading 5A.2 on Sampling method and survey, which revealed that a sample size of 420 respondents (gamers) are sufficient to provide insights into the South African gaming community.

Starting with Section A of the questionnaire, Table 5.2 provides a summary of the demographic profile of visitors who attended the rAge Expo followed by an examination of the results.

Table 5.2: Descriptive statistics on the demographic profile of respondents

Profile aspects	**rAge 2016 profile results**
Gender	Male (86%); Female (14%)
Age	Ages 12 - 18 (25%); Ages 19 - 25 (51%); Ages 26 - 35 (19%); Ages 36 - 45 (4%); Ages above 45 (1%); Average age of 23 years

Home language	English (58%); Afrikaans (36%); Other (6%)
Relationship status	Single (72%); In a relationship (12%); Married (12%); Engaged (3%)
Province of residence	Gauteng (86%); Mpumalanga (4%); North West (3%); KwaZulu-Natal (3%); Free State (2%); Western Cape (1%); Limpopo (1%)
Level of education	Currently busy with a degree (23%); Currently busy with high school (19%) (not matric); Completed Grade 12/Matric (15%); Completed a degree (14%); Completed a post-graduate degree (8%); Currently busy with Grade 12/Matric (7%); Another form of education (7%); Completed some high school (4%) (not matric); Currently busy with a post-graduate degree (3%)
Occupation (open question in the questionnaire, reflected here is the most common answers)	University student; High school student; Information Technology (IT) Specialist; Accountant; Administrator; Software developer; Construction; Operator; Educator/Teacher; Engineer; Accountant; Programmer; Analyst; Consultant; Personal assistant; Retail and Sales; Coaching; Transportation and many other occupations
Annual gross income/yearly allowance	<R20 000 (39%); R20 001 - R75 000 (16%); R75 001 - R125 000 (14%); R125 001 - R200 000 (7%); R200 001 - R275 000 (5%); R275 001 - R350 000 (5%); R350 001 - R425 000 (4%); R425 001 - R500 000 (1%); >R500 001 (9%);
A resident of the Johannesburg area	Yes (68%); No (32%)
Nights staying over in the Johannesburg area (if not a local resident)	None (25%); 1 Night (13%); 2 Nights (15%); 3 Nights (33%); 4 Nights (8%); 5 Nights (3%); More than 5 nights (3%); Average of 2.13 nights
Type of Tickets purchased	Day tickets (54%); NAG LAN tickets (27%); Weekend tickets (17%); Other (2%)
Place where tickets were purchased	At the entrance (43%); Online (41%); Other (16%)
Number of people in group	Travelling alone (7%); Group size of 2 people (21%); Group size of 3 people (22%); Group size of 4 people (15%); Group size of 5 people (10%);

	Group size of 6 persons (6%); Group size of 7 persons (3%); Group size of 8 persons (6%); Group size of 9 persons (1%); More than 10 people (9%); Average of 5.04 people per group	
Number of people paid for	Paid for no-one (12%); Paid for 1 person (55%); Paid for 2 persons (20%); Paid for 3 persons (6%); Paid for 4 persons (3%); Paid for 5 and more persons (4%); Average of 1.48 persons	
Average expenditure per person who paid for themselves and/or for more than one person (The average spending for 1.48 people i.e. the number of persons the respondents indicated they were financially responsible for)	Total average spending	R2 231.77
	Ticket(s)	R 321.04
	Accommodation	R 20.59
	Food and beverages	R 236.95
	Merchandise	R 259.01
	Gaming accessories	R 315.63
	Video games (disc sales)	R 213.69
	Video games consoles	R 156.42
	PC hardware	R 395.65
	PC software	R 43.73
	Transportation	R 109.10
	Parking	R 8.13
	Contest entry fees	R 2.51
	Hobby accessories (board games, card games, gadgets)	R 131.08
	Other (Items not listed above)	R 18.24
Number of attendances	1st attendance (29%); 2nd attendance (19%); 3rd attendance (17%); 4th attendance (13%); 5th attendance (7%); More than 5 times (15%); Average of 3.3 times	
Other gaming events attended/attendance	GeekFest (Local event); Gamescom (International event); E3 - Electronic Entertainment Expo (International event); LANX (Local event); ICON - Comic and Games Convention (Local event); Cold Fusion LAN (Local event); BlizzCon (International event), Mayhem (Local event); EGE Electronics and Gaming Expo (Local event)	

Source: Researcher's own compilation

The following aspects are evident from Table 5.2:

- The majority of respondents were single (72%), male (86%) and English speaking (58%) visitors averaging an age of 23 years. Compared to the United States (US) (see ESA, 2016:3) and Germany's gamers (see BIU, 2017:10), averaging an age of 35 years, it appears that South Africa has a much younger gaming community. The percentage gap in male versus female respondents (86% versus 14%) is also bigger when compared to leading first world gaming countries such as the US which sees an equal distribution of male and female gamers (ESA, 2016:3), whereas UK gamers are 57% male and 43% female (Ukie, 2015:16) and German gamers are 53% male and 47% female BIU, 2016:internet).
- Many respondents indicated that they were in the process of some higher education/schooling. At the time, 23% were busy with obtaining a degree; 14% had already obtained a degree, and 26% were busy with high school of which 7% was busy with Matric/Grade 12. A report done by LifeCourse Associates (2014:2) revealed that gamers are more likely to hold a college degree or higher (43% of gamers) as compared to non-gamers (36%).
- Many respondents were university and high school students in addition to the various other jobs respondents occupied ranging from information technology (IT) specialists, accountants, administrators, software developer to teachers, Engineers and sport coaches to name a few. This corresponds to Nielson Games' (2008:76) research that indicated gamers having vast and various occupations, with students occupying the greater part.
- The annual gross income of respondents averaged R164 941.
- Most respondents stayed within the Gauteng province (86%) of which 68% of these respondents stayed within the Johannesburg area.
- Non-locals to the Johannesburg area (32%) stayed an average of 2.13 nights in the area.
- At the event, the majority of respondents paid for themselves (55% of respondents) or paid for an average of 1.48 people, with day tickets being the most popular type of ticket purchased (54%) and most tickets purchased took place at the entrance (43%) or online (41%).
- Respondents attending the expo travelled in groups averaging 5.04 people of which 22% of respondents travelled in groups of three.
- The average expenditure of respondents who paid for themselves and/or for more than one person spends an average of R2 231.77 on the event, including accommodation and transport costs. Most of these expenses were on PC hardware

(R395.65), ticket(s) (R321.04), gaming accessories (R315.63), Merchandise (R259.01), food and beverages (R236.95) and video games (disc sales) (R213.69).

- For many respondents, it was their first time attending rAge (29%) followed those who attended the rAge Expo for a second (19%) and third time (17%). On average respondents attended the rAge Expo 3.3 times.

Secondly, Table 5.3 provides a summary of the results to the questions found in Section B of the questionnaire. This includes the gaming and purchase behaviours of the respondents. Following the table is a short discussion of the results.

Table 5.3: Descriptive statistics on gaming and purchase behaviour

Gaming and purchase behaviour aspects	**rAge 2016 profile results**
Age first started playing games	6 years and below (42%); 7-17 years of age (49%); 14-18 years of age (7%); 19-25 years of age (2%); The average age of 8.1 years
First gaming device	PC (28%); PlayStation 1 (22%); Nintendo Entertainment System (NES) (15%); PlayStation 2 (13%); Other gaming devices (8%); Atari 2600 (6%); Gameboy (3%); Sega Genesis (2%); Wii (2%); Nintendo 64 (1%)
Current devices used for playing video games (multiple options applied)	Desktop/laptop gaming (76%); game consoles (71%); Cell phone/ handheld devices (tablets) (53%); Portable/handheld consoles (23%); Other (1%)
Gaming device of choice	PC (57%); PlayStation 4 (36%); Xbox One (3%); PlayStation 3 (3%); Wii (1%)
Type of video gaming purchases made regularly (multiple options applied)	Digital games (full game) (68%); Physical discs (59%); Downloadable content (dlc) (50%); App-based games (mobile and tablet) (24%); Subscription fees (21%); Micro-transactions (19%); Other (1%)
Annual average spending on video games (game software)	≤R 1 000 (23%); R1 001-R2 500 (26%); R2 501- R5 000 (27%); R5 001- R7 500 (6%); R7 501- R10 000 (10%); Above R10 000 (8%); Average of R4886.59
Average amount spend on video-game hardware over the past 5 years (2012-2016)	≤ R5 000 (29%); R5 001 -R10 000 (23%); R10 001 - R20 000 (18%); R20 001-R35 000 (12%); R35 001-R50 000 (10%); Above R50 000 (8%); Average of R23909.73

Preferred type of gaming (multiple options applied)	Single player (77%); Online multiplayer (74%); Online Co-op (55%); Competitive multiplayer (54%); Co-op multiplayer (51%); Local area network (LAN) (41%); Massively-multiplayer online games (MMOFPS & MMORPG) (38%); Split-screen multiplayer (32%); Split-screen co-op (27%); Other (3%)
Genre of video games played (multiple options applied)	Action (88%); Adventure (81%); Shooter (78%); Role-playing games (rpg) (64%); Fighting (57%); Open world/sandbox (56%); Strategy/tactics (55%); Survival horror (53%); Driving/racing (48%); Arcade (40%); Platform (37%); Sport (34%); Simulation (flight, city, life) (32%); Puzzle/Card (25%); Music/dance/rhythm (18%); Social Networks/Social Media (16%); Educational (11%); Fitness (10%); Other (4%)
Game specific aspects (level of importance when playing a game)	Gameplay (mean value of 4.64; Extremely important); Story (mean value of 4.37; Important); Length (mean value of 4.19; Important); Replayability (mean value of 4.06; Important); Graphics (mean value of 4.01; Important); Voice and sound (mean value of 3.90; Important); Music (mean value of 3.57; Less important)
Average time spent playing video games	Average of 4.04 hours a day Average of 23.23 hours a week
Type of gamer (self-identification)	Casual gamer (57%), Hard-core gamer (38%), Both (5%)
Favourite video-game titles (multiple answers applied and therefore percentages do not calculate up to 100%)	Call of Duty series (23%); Battlefield series (15%); Counter-Strike: Global Offensive (12%); The Elder Scrolls V: Skyrim (9%); Grand Theft Auto series (9%); DOTA 1 and 2 (9%); Uncharted series (8%); The Witcher series (8%); League of Legends (8%); FIFA Soccer series (8%); Assassins Creed series (8%); Overwatch (7%); World of Warcraft (5%); Need for Speed series (5%); Mass effect series (5%); Final Fantasy series (5%); Fallout series (5%); Tomb Raider series (4%); The Last of Us (4%); Mortal Combat series (4%); Pokemon games (3%); Halo series (3%); God of War series (3%); Borderlands series (3%); Bioshock series (3%); Batman: Arkham series (3%)

Source: Researcher's own compilation

The following aspects are evident from Table 5.3:

- Respondents started playing video games at the average age of 8.1 years of which forty-nine percent of respondents (49%) started playing at the ages of 7-17 years with PC (28%); PlayStation 1 (22%); Nintendo Entertainment System (NES) (15%) and PlayStation 2 (13%) being their first gaming devices.
- The majority of respondents use more than one device for gaming, with PC/laptop (76%) and console gaming (71%) being the most popular devices and PC the most preferred device (57%), followed by the PlayStation 4 (36%). Similarly, PC and console gaming ranked the most popular platforms for gaming (ESA, 2016:5). In opposition to the said, mobile gaming (player-base) is starting to surpass both PC and console gaming in the Asian markets including Japan (Yin-Poole, 2017:internet),

China (Harding-Rolls & Cui, 2017:internet) and South Korea (KOCCA, 2013:24) as well as in the European markets including Germany (GTAI, 2017:1) and the UK (TIGA, 2016:9).

- Respondents spend an average of R4 886.59 on video games (software) of which most of this spending is on digital games (full game) (68%), physical discs (59%) and downloadable content (DLC) (50%). These results contradict the gaming revenue results of game sales done by PricewaterhouseCoopers in 2017. Their results for 2016 on South Africa's video gaming industry revealed that R614 million in revenues were made by physical console game sales compared to the R73 million in digital console games sales and R237 million in revenues were made by physical PC games sales compared to the R124 million in digital PC game sales (PwC, 2017:78).
- Over a period of five years (2012-2016) respondents indicated spending an average of R23 909.73 on hardware dedicated to gaming (excluding mobile phone and tablet purchases). By comparison, if one divides this figure by five to represent a per year total, it is apparent that software purchases are higher than hardware purchases which are similar to console hardware/software sale results globally (VGChartz, 2018:internet).
- The preferred type of gaming amongst respondents were identified as single player (77%) and online multiplayer (74%) gaming with action (88%), adventure (81%), shooter (78%), and role-playing games (RPG) (64%) being the most popular type of gaming genres. Action, adventure, shooters and role-playing games are also amongst the most popular genre of games in Germany (VGChartz, 2017c), the UK (TIGA, 2016:9) and the US (ESA, 2016:10), showing similarity with South Africa's video gaming market.
- When it comes to the different gaming aspects when playing video games, respondents identified gameplay (mean value of 4.64) to be extremely important followed by the story (mean value of 4.37), length (mean value of 4.19), replayability (mean value of 4.06) and graphics (mean value of 4.01) as important aspects. According to Masuch and Röber (2005:2), the fun factor of video games will mostly lie in gameplay and story as it is the most important features for gamers. This statement holds true of the results found above.
- Respondents indicated that they spent an average of 4.04 hours a day and 23.23 hours a week playing video games of which fifty-seven percent (57%) considered themselves as casual gamers. These hours spent playing games are significantly higher than that of European gamers (6.2 to 7.5 hours a week) (Ipsos Connect, 2017:2) and South Korean gamers (141.4 minutes a day) (KOCCA, 2013:23). These

results are also very surprising since hard-core gamers are known for spending much of their leisure time playing video games (Bosser & Nakatsu, 2006:374).

- When asked to identify most favourite video-game title, the following top titles were identified, namely the Call of Duty series (23%), Battlefield series (15%), Counter-Strike: Global Offensive (12%), The Elder Scrolls V: Skyrim (9%); Grand Theft Auto series (9%), DOTA 1 and 2 (9%), Uncharted series (8%), The Witcher series (8%), League of Legends (8%), FIFA Soccer series (8%), Assassins Creed series (8%) and Overwatch (7%). Shooter/action games such as the Call of Duty and Battlefield series were ranked amongst the most popular games in the US in 2016/2017 (Gamespot, 2017:internet). Games such as DOTA 2, World of Warcraft, and League of Legends were amongst the most popular games in China and South Korea in 2016/2017 (Custer, 2017:internet; Romin, 2017:internet). Grand theft Auto 5, another game identified by the respondents have been popular in sales for many years after its release in 2013, including the UK (Metro, 2017:internet), Germany (VGChartz, 2017c:internet) and the US (Gamespot, 2017:internet).

Thirdly, Table 5.4 provides the results to questions found in Section D. This excludes the 5-point Likert scale question of Section C (Question 28 on reasons for playing video games) and those found in Section D (Question 32 on reasons for attending the rAge expo and Question 33 on evaluating the expo). The answers to the Likert scale questions are revealed in the following section using factor analyses. Additionally, the theme of creativity as a by-product of playing games was incorporated by the researcher as a self-developed open-ended question for this section (Question 29a, b).

Table 5.4: Descriptive statistics on event-related questions

Event-related aspects	**rAge 2016 profile results**
Self-identification as a creative person	Yes (62%); Maybe (28%); No (10%)
Creativity as a result of playing games (if said yes or maybe in the question above)	Creativity in the form of visual art from playing video games includes: • sketching/drawing/painting; • animation and graphic designing; and • create or build things within game worlds (Minecraft). Creativity in the form of performing and literary arts from playing video games include: • writing blogs, game reviews, music, song lyrics, fan fiction and comics; • create videos on YouTube, twitch or making independent films; and • creating music by playing guitar, piano or by singing.

	Mental, social and physical aspects of playing games include • stimulate creative thinking; • provide ideas to create new worlds and/or games (on paper, digitally or in the mind); • improve reaction times; • increases general awareness; • improves teamwork skills; • improves planning skills; • helps with strategic thinking; • improves problem-solving skills; and • helps one to 'think outside the box'.
Age first heard about the rAge expo in Johannesburg	≤ 6 Years (2%); 7-13 Years (32%); 14-18 Years (44%); 19-25 Years (16%); Above 25 Years (6%); The average age of 15.97 years
Source of exposure (multiple options applied)	Word-of-mouth (72%); Gaming-related websites (35%); Magazines (30%); Facebook (28%); Computicket's website (14%); Twitter (10%); Radio (9%); and Other (8%).
Future attendance	Yes (88%); Maybe (11%); No (1%)

Source: Researcher's own compilation

The following aspects are evident from Table 5.4:

- The majority of respondents (62%) consider themselves to be creative, while 28% see themselves as maybe being creative. As a source of this creativity, playing video games has inspired them to sketch, paint, draw, animate and graphic design, sing songs, play instruments, write blogs, stories game reviews and comics, create fan films and YouTube videos and create new ideas and worlds for video games. Playing video games has also helped them improve mental, physical and social skills such as stimulating the creative thinking process, improved strategic thinking, improved problem solving ('thinking outside the box'), improved teamwork skills, improved planning skills, as well as in improving their reaction times and general awareness of the world around them. According to a study by Jackson, Witt, Games, Fitzgerald, Von Eye and Zhao (2012:373), children who play video games tend to be more creative than those who do not. Furthermore, their research revealed that 'all types of video games were strongly related to all measures of creativity except Racing/Driving games'. For more references supporting this, one can easily search, find and browse the many Youtube, fan art and gaming-related content available on the World Wide Web.

- Respondents first heard about the rAge Expo in Johannesburg at the average age of 15.97 years with word-of-mouth (72%) being the primary source of this exposure followed by gaming related websites (35%) and magazines (30%). A study by Kruger and Saayman (2018:243) of visitors to a design exhibition in South Africa also revealed that word-of-mouth was the primary source of event information with magazines in third place as well. As for video gaming expos, no information on this topic could be found by the researcher.
- Eighty-eight percent (88%) of respondents confirmed that they will attend the expo again with 11% that said maybe and only 1% that said no.

5A.4.2 Results from the factor analyses

Three exploratory factor analyses were done on the five-point Likert scale questions found in Section C and Section D of the questionnaire. This included Question 28 on the reasons/motives for playing video games (1st analysis), Question 32 on the reasons for attending the rAge Expo in Johannesburg (2nd analysis) and Question 33 where respondents are asked to evaluate the Expo according to different aspects (3rd analysis). Since this study covers new research not previously done on video gaming events, the literature on the factors identified for the second and third analyses are limited to comparisons made to exhibition and festival research.

- Construct validity and reliability

Factors for all three analyses were determined by using Kaiser's criterion, where components were selected if they had an eigenvalue of 1 or more (Pallant, 2010:181). All items loaded on a factor had a loading greater than 0.26, indicating that there is a reasonable correlation between factors and their component items. According to Pietersen and Maree (2007:221), the arbitrary chosen cut-off value for a loading is 0.4. Alternatively, according to Field (2013:692), it is recommended to suppress factor loading less than 0.3 and Child (2006, as cited by Samuels, 2016:1) advise that items with scores lower than 0.2 should be removed. Additionally, if one includes items that are below 0.4, it is recommended that at least three items in that factor have loadings greater than 0.4 (Samuels, 2016:2). In all three factor analyses, all factors that contain items with loadings below 0.4 has at least three items with loadings above 0.4. Another reason for including items with loadings lower than 0.4 has to do with the descriptive relationship between these items and the other items loaded onto a factor. Factors that include items with a loadings below 0.4 are found in the factor analyses done on motives for playing games and motives for attending the rAge Expo, with the former being the only analyses that contain a factor (Factor 5: Mental and creative

exploration) with a loading below 0.3 (loading of 0.27 for item: To improve my gaming avatar (character) and achieve his/her objectives). The total variance explained for all three factor analyses was further above 50%, which is considered to be the cut-off value for an appropriate fit of the selected components (Pietersen & Maree, 2007:218). Additionally, if the total variance explained is above 50%, it is considered an acceptable value to explain variance (Beavers, Lounsbury, Richards, Huck, Skolits & Esquivel, 2013:8; Pietersen & Maree, 2007:218). The three factor analyses are identified and explained as follows:

5A.4.2.1. Results from the factor analysis on motives for playing video games

A pattern matrix was generated to categorise motives for playing video games (31 items) into five factors (Table 5.5). From these five factors, 53.22% of the total variance was explained. The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy of the factors is 0.902, which is above 0.5, indicating that the sample size is adequate for yielding distinct and reliable factors (Field, 2013:695). Barlett's test, $X^2(465) = 4576.491$, $p<0.001$ indicates that the correlation within the R-matrix is sufficiently different from zero to warrant an appropriate factor analysis (Field, 2013:695). All five factors also have a coefficient of reliability above 0.60. Usually, a Cronbach Alpha value of 0.65 is considered the minimum recommended value for good reliability, or internal consistency, of a set of scale or to test items (Goforth, 2015:internet). Cronbach Alpha coefficients that are 0.5 and lower are generally unacceptable for testing reliability of a set of items (Goforth, 2015:internet). In this case of low Cronbach alpha values, due to a small number of items, it is better to calculate and report the mean inter-item correlation for the items. As for the average-inter-item correlation, values for the five factors range from 0.24 to 0.45. According to Clark and Watson (1995:316), if the average inter-item correlation ranges between 0.15 to 0.50 is considered an indicator for acceptable levels of consistency.

Table 5.5: Pattern Matrix: Motives for playing video games

Motives for playing video games	Factor 1: Role-playing	Factor 2: Social cohesion and competitiveness	Factor 3: Self-development and expression	Factor 4: Recreational escapism	Factor 5: Mental and creative exploration
To be the hero	0.74				
To be the villain	0.74				
For playing as someone else	0.73				
To follow a story and be its protagonist	0.69				
To feel in control of my decisions and actions	0.67				
To create my own story	0.57				
To fulfil secret desires (things I am unable or not allowed to do in real life)	0.39				
To meet new people		0.79			
To be part of a team and compete as a team		0.78			
To feel part of a community		0.76			
To compete against other players and to win		0.74			
Playing games allows me to spend time with friends and relatives		0.63			
Because I like to be challenged and games provide me with a challenge		0.42			
To improve my gaming skills		0.42			
Playing video games forms part of my lifestyle		0.31			
To cope with stress and personal problems			0.71		
To keep me company when I am alone			0.68		
To escape from reality			0.65		
To spend time with myself			0.65		
To express myself emotionally			0.39		

Because it is fun				0.66	
To relax and get out of my daily routine				0.50	
To eliminate boredom				0.42	
It helps to improve my mood				0.39	
Overcoming a challenge gives me a feeling of success and accomplishment				0.36	
To create new worlds					0.75
To explore new worlds					0.62
Because it is educational					0.58
To express myself creatively and imaginatively					0.52
To improve my problem solving and strategy skills					0.49
To improve my gaming avatar (character) and to achieve his/her objectives					0.27
Reliability coefficient (Cronbach Alpha)	**0.85**	**0.85**	**0.73**	**0.61**	**0.79**
Average-inter-item correlation	**0.45**	**0.42**	**0.35**	**0.24**	**0.39**
Mean value	**3.37**	**3.70**	**3.34**	**4.09**	**3.63**

As identified in Table 5.5, the five factors for motives for playing video games, ranging from the highest to lowest levels of agreeability based on the mean values, are as follows:

- Factor 4: Recreational escapism

Recreational escapism in this context refers to motives that take players out of a state of boredom and into something fun and meaningful. Recreational escapism motives include playing games because it is fun, to relax and do something different from the daily routine, to eliminate boredom, to improve one's mood and to overcome challenges that lead to a feeling of success and accomplishment. Recreational escapism is the highest rated factor with a mean value of 4.07, which is an agreeable motive for playing video games. Alternatively, its Cronbach's alpha value of 0.61 is below the minimum suggested level of 0.65 for measuring reliability, but fortunately the factor has an average-inter-item correlation of 0.24, which indicates an acceptable level of consistency.

Yee's (2006:773) study on 'Motivations for play in online games' revealed 'Escapism' to be an important factor for playing video games, which included the items relax, escape from real life and to avoid real-life problems. In addition, De Grove *et al.* (2016:115) grouped similar items for the factor 'Escapism' as reasons for playing video games, such as forgetting about one's daily routine and playing video games as a means to get away from it all. Escapism is also a general motive found in the majority of event-, festival- and leisure-research. Recreation by definition of Oxford Dictionaries (2018:internet) is an 'activity done for enjoyment when one is not working'. Recreation is also an activity that is freely pursued in one's own time/leisure time that is pleasurable and contains a constructive structure or goals related to achievement (Gray & Pelegrino, 1973:7; Kraus, 1978:7; Pigram, 1983:3).

- Factor 2: Social cohesion and competitiveness

Factor two is characterised by items-related social motives of cohesion and competitiveness; and include items such as meeting new people, feeling part of a community, being part of a team and competing as a team, competing and winning against others, spending time with family and friends, being challenged by the challenges video gaming present, improving gaming skills, and because playing video games is part of one's lifestyle. This factor has a highly acceptable Cronbach's alpha value of 0.85, and the second highest mean value (3.70), which indicates that it is an agreeable factor for playing video games. According to Yee (2006:773), socialising, as well as competition are important reasons for people to play video games, especially online. However, Yee (2006:773) did not categorise these components into one factor, as is done in this study, but rather separated them into two individual factors.

- Factor 5: Mental and creative exploration

For this factor, mental and creative exploration refers to the imaginative side of creating and exploring and the mental side of learning and strategizing. This includes motives for playing games such as to create new worlds, to explore new worlds, because they are educative, to express oneself creatively and imaginatively, and to improve problem-solving and strategy skills. This is also the 3rd most important factor with a mean value of 3.63, which is an agreeable motive for playing video games and has an acceptable Cronbach's alpha value of 0.79. Unlike this factor where the items of game-world exploration and creation are grouped together, Loffredo and Tavakkoli (2017:34) grouped these items separately. Items concerning game-world customisation (character), expression and creation (house building) were grouped under the factor 'Customization' whereas items on game-world exploration were grouped under the factor 'Autonomy/Exploration'(Loffredo & Tavakkoli, 2017:34).

Loffredo and Tavakkoli (2017:34) considered both these factors important reasons to play video games.

- Factor 1: Role-playing

This factor encompasses motives related to role-playing where players take on different roles or create their own new stories within games, including being the hero, the villain or just playing as someone else, to follow a story and be its protagonist, to create one's own story, to fulfil secret desires, and to be in control of one's own decisions and actions. The Cronbach's alpha value for this factor is 0.85, which is a highly acceptable score, and the factor has a mean value of 3.37 (4th highest factor), which is a neutral or undecided response for playing video games. *Role-playing* was also identified by Yee (2006:773) as an important factor for grouping motives for playing video games. Story-related aspects such as its believability and one's involvement in a story were grouped as the factor 'Narrative' by De Grove *et al.* (2016:115).

- Factor 3: Self-development and expression

The items in this factor relate to oneself and the personal benefits it presents when playing, including to cope with stress and personal problems, to keep oneself company when alone, to spend time by oneself, and to express oneself emotionally. According to the mean value of 3.34, this is the lowest rated factor and one that is an undecided or neutral motive for playing a video game. As for the Cronbach's alpha value, 0.73 is considered a good score for the reliability of a set of items. To 'feel less lonely' and 'to forget problems' were also considered less agreeable reasons for playing games amongst adolescents in Olson *et al.*'s (2007:81) study on 'Factors correlated with violent video-game use by adolescent boys and girls'.

5A.4.2.2 Results from the factor analysis on motives for attending the rAge Expo in Johannesburg

Using a pattern matrix, four factors were identified from 21 items (motives) (Table 5.6). Total variance explained for these four factors amounted to 53.5%, which is considered an appropriate fit of the selected components. The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy of the factors is 0.848, indicating that the sample size is above 0.5 and adequate for yielding distinct and reliable factors (Field, 2013:695). According to Barlett's test, $x^2(231) = 2839.226$, $p<0.001$ indicates that the correlation within the R-matrix is sufficiently different from zero to warrant an appropriate factor analysis (Field, 2013:695). The four factors also have a coefficient of reliability that equalled 0.60 and above. Although 0.65 is usually warranted as the minimum Cronbach Alpha value to test reliability amongst

items, the average-inter-item correlation for all four factors is between 0.15 and 0.50 which indicates that there are acceptable levels of consistency (Clark & Watson, 1995:316).

Based on the level of importance, the four factors for motives for playing video games, as identified in Table 5.6, in order of importance, are as follows:

- Factor 3: Social gaming development

Motives identified in this factor relate to getting updated on the last gaming trends, as well as to socialise and relax. Gaming updates and socialisation items or motives include getting updated on the latest products in gaming development, to spend time with relatives and friends, to socialise and meet people with similar interests and to relax and escape from my daily routine. This factor is the most important reason why people attend the Expo with a mean value of 4.02. Unfortunately, this factor has a low Cronbach Alpha value of 0.60 but as an average-inter-item correlation of 0.26 which is an acceptable value for inter-item consistency. To get updated on the latest products and developments are some of the most important reasons for people to attend exhibitions (see Chung *et al*., 2014; Gramann, 1994 as cited by Blythe,1999:103). Wei and Lin (2015:292) identify both information gathering and socialisation among the top reasons for attending food-related exhibitions in Taiwan. A study by Kruger *et al.* (2014:661) revealed that the factor 'enhancement of kinship/relationships', which included various social aspects, was the second most important reason for attending a wedding expo in South Africa.

Table 5.6: Pattern Matrix: Motives for attending the rAge Expo in Johannesburg

Motives for attending the rAge Expo	Factor 1: Following gaming developments	Factor 2: Gaming promotions and competitions	Factor 3: Social gaming development	Factor 4: Gaming purchases
To test the latest gaming gadgets, gear (VR), PC hardware and consoles	0.79			
To demo/test the latest in upcoming games	0.78			
Because the internet connection is very fast	0.55			
To be part of a 'geek' culture	0.32			
To compete with my friends against other players		0.79		
To participate in gaming competitions		0.74		
To have fun		0.62		
To be part of the cosplay		0.62		
To get 'freebies'		0.58		
Attending events like these form part of my lifestyle		0.51		
Because of the promotions and discounts		0.48		
To participate in the NAG LAN		0.40		
To get updated on latest in gaming development			0.69	
To spend time with relatives and friends			0.67	
To socialise and meet people with similar interests			0.49	
To relax and escape from my daily routine			0.36	
To purchase merchandise				0.81
To purchase video-game hardware (consoles and PC parts)				0.79
To purchase video games				0.78
To meet game developers				0.75
Because it is the biggest annual video gaming exhibition in SA				0.53
Reliability coefficient (Cronbach Alpha)	**0.74**	**0.81**	**0.60**	**0.79**
Average-inter-item correlation	**0.43**	**0.49**	**0.26**	**0.44**
Mean value	**3.85**	**3.08**	**4.02**	**3.53**

- Factor 1: Following gaming developments

This factor relates to participating in demonstration activities and keeping up to date with the latest gaming cultural trends, such as to test the latest gaming gadgets, gear (VR), PC hardware and consoles, to demo/test the latest in upcoming games, to be part of a 'geek' culture, as well as to have fast internet connectivity to do so. The factor has the second highest mean value of 3.85, which is an agreeable motive to visit the rAge Expo and an acceptable Cronbach Alpha value of 0.74. Obtaining information on the latest products and developments are some of the most important reasons for attending consumer and trade shows, and expositions (see Chung *et al.,* 2014:67; Kruger *et al.,* 2014:654; Wei & Lin, 2015:292), but the rAge Expo also allows for the demonstration and interactivity of such products which might also explain its high mean value relative to Factor 3: Social gaming development. A study by Lee *et al.* (2010:223) uses the term 'Market investigation' to explain comparing, testing and investigating alternative products as motives for attending Hong Kong exhibitions.

- Factor 4: Gaming purchases

This factor has to do with activities related to purchases made at the event which includes video-game hardware purchases, video-game purchases and merchandise purchases. With a mean value of 3.53, this factor is the third most important reason for attending the Expo. It also has an acceptable Cronbach Alpha value of 0.79. According to Wei and Lin's (2015:292) study on food-related exhibitions in Taiwan: 'the main reasons for attending exhibitions for public visitors were procurement opportunity and exploring market trends'. This is also true for the three most important factors of this analysis that has to do with information gathering and testing of the newest products, as well as procuring games and gaming-related merchandise. Unlike this study, the social event factor was seen as the least important factor for public visitors to food-related exhibitions in Taiwan (Wei & Lin, 2015:292).

- Factor 2: Gaming promotions and competitions

Gaming promotions and competitions, in the context of this factor, relate to interactive participation in event-related activities such as to participate in gaming competitions, to compete against others with friends, to participate in the Nag LAN, to be part of the cosplay, as well as to obtain promotions, discounts and 'freebies'. This factor has the lowest mean value of 3.08 and a neutral or indecisive reason for attending the rAge Expo. The Cronbach Alpha value of 0.81 is a highly acceptable score for this factor. As opposed to many other exhibitions, the rAge Expo provides many different opportunities to compete for prizes,

similar to a tournament structure. According to the researcher's knowledge, limited research has explored this area on exhibition events. Alternatively, exhibitions are used as a marketing-mix tool and as such it is not uncommon for attending them for their promotional value (see Situma, 2012:223; The Global Association of the Exhibition Industry [UFI], 2015:79).

5A.4.2.3. Results from the factor analysis on the evaluation of expo-related aspects

Four factors were identified to categorise 19 items using the pattern matrix technique for analysing factors as shown in Table 5.7. Total variance explained for all four factors amounted to 55.77%, which is considered an appropriate fit of the selected components because it is above the 50% cut-off limit. The Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy of the factors is 0.885, indicating a sample size well above 0.5, which is adequate for yielding distinct and reliable factors (Field, 2013:695). According to Barlett's test, $x^2(171) = 2344.365$, $p<0.001$ indicates that the correlation within the R-matrix is sufficiently different from zero to warrant an appropriate factor analysis (Field, 2013:695). All four factors have a coefficient of reliability above 0.65, which indicates acceptable Cronbach Alpha values for reliability or internal consistency of items. Additionally, the average-inter-item correlation of all factors ranged from 0.35 to 0.47 which is within the parameters of acceptable levels of consistency (see Clark & Watson, 1995:316).

The four factors for evaluating the rAge Expo, as identified in Table 5.7, are as follows:

- Factor 4: General organisation

Aspects included in this factor relate to the organisation of the expo and include well-organised parking, an organised event, having a comfortable venue and staff that are well informed. General organisation is the most agreeable factor for the event with a mean value of 3.89. This factor also has a good Cronbach Alpha value of 0.79. Wei and Lin (2015:294) identified similar items in their study on the service quality of food-related exhibitions in Taiwan. However, the items they identified were categorised into two factors with the factor 'Services' containing the item 'staff knowledge' and the factor 'Layout/signage' contain 'east to enter/exit' and 'resting/lounge areas' (Wei & Lin, 2015:294). Services, according to Wei and Lins (2015:298), was among the main factors in determining visitor satisfaction. Other studies on service quality at exhibitions (see Choe, Lee & Kim, 2014:906) and museums (Hsieh, Chen, Hsieh & Tsai, 2018:116) also revealed items similar to those found in this factor but with the exception of it being divided into several different factors.

- Factor 3: Venue management

This factor involves management aspects related to the venue itself such as hygienic ablution facilities, enough moving space between checkpoints, visibility of signage, staff availability and willingness to help and information available about the expo. Having the second highest mean value of 3.84, it is an agreeable factor for the expo. Its Cronbach Alpha value of 0.75 also shows acceptable reliability among the items included. According to Michelini, Iasevoli and Theodoraki (2017:322), the physical features of a venue (size and space) and the services offered (including facilities and staff) are two very important criteria within the events venue sector to determine visitor satisfaction and loyalty. These aspects also play an important role in attracting and maintaining sponsorship outcomes (Michelini *et al*., 2017:328).

- Factor 1: Quality and variety of content

This factor has to do with the availability and variety of stalls and exhibitors at the expo, including the variety of stall, demo booths, developers, as well as the quality of competitions organised and internet speed. Having a mean value of 3.74, this is the third highest factor respondents agreed are true for the expo. The factor also had an acceptable reliability coefficient score of 0.76. In many, if not all events, the content/activities constitute the central focus of the said event and thus having good quality, variety and appropriate theme-related content can lead to visitor satisfaction (Tanford & Jung, 2017:210-211).

- Factor 2: Affordability

Affordability represents the reasonability of prices, promotions, and give-aways at the expo including ticket prices, snacks and beverage prices, and the number of discounts, promotions and ‘freebies’. This is an undecided or neutral factor with a mean value of 3.30, lowest rated factor, and one which has an acceptable Cronbach Alpha value of 0.73. A study by Lee and Min (2015:334) identified economic value, which included the items ‘the Expo is worth the money I paid’, ‘the Expo represents good economic value’ and ‘I am happy with the expenditure on the Expo’, as an important factor for explaining experiential value (value of the experience) at a mega-event/expo. However, they also found that escapism and excellence were more important in shaping experiential value than economic value and visual appeal (Lee & Min, 2015:343).

Table 5.7: Pattern Matrix: Evaluation of expo-related aspects

Evaluation of rAge	Factor 1: Quality and variety of content	Factor 2: Affordability	Factor 3: Venue management	Factor 4: General organisation
Good variety of retail shops	0.83			
Good variety of demo booths	0.73			
Good variety of game developers	0.68			
Competitions are well organised	0.49			
Good internet speed and connection	0.42			
Reasonable ticket prices		0.79		
Ticket sales are easily accessible		0.66		
Service/prices of snacks and beverages are good/affordable		0.56		
A good number of discounts and promotions		0.52		
A good number of 'freebies'		0.45		
Signage is visible at the expo			0.68	
Enough space to move between checkpoints			0.66	
Information about the expo is readily available			0.59	
Hygienic ablution facilities			0.50	
Expo staff is friendly and willing to help			0.44	
Parking is well-organised				0.85
The venue is comfortable				0.72
Expo staff is well-informed				0.54
The expo is well-organised				0.53
Reliability coefficient (Cronbach Alpha)	**0.76**	**0.73**	**0.75**	**0.77**
Average-inter-item correlation	**0.40**	**0.35**	**0.38**	**0.47**
Mean value	**3.74**	**3.30**	**3.84**	**3.89**

5A.4.3 Market segmentation results

To provide a better understanding of the video gaming market, two separate market segmentation bases were employed. By doing this, one can 'subdivide a market along with some commonality, similarity, or kinship' used for market segmentation (Thomas, 2017:1). Segment structures can then be drawn against socio-demographic and behavioural characteristics for the purpose of market comparisons. Firstly, the respondents were segmented based on their motives for playing video games (c.f. Table 5.5). This was done to give a better overview of the market in general. Secondly, the respondents were segmented based on their motives for attending rAge Expo (c.f. Table 5.6). This was done to gain a better understanding of the market attending video gaming expos. A summary describing the tests used for doing the market segmentation and comparisons follows below:

Firstly, two cluster analyses were done to divide data into groups (clusters) that are meaningful, useful or both (Tan, Steinbach, Karpatne & Kumar, 2018:487). This statistical technique was used to segment the respondents. A cluster is a collection of data objects that are similar to one another but dissimilar from data objects in another cluster (Madigan, 2013:1). It is also the goal of a cluster analysis to group objects that are similar or related to those that are dissimilar (Tan *et al.,* 2018:490). More specifically, a hierarchical cluster analysis is used to show where the objects are joined together hierarchically from most similar, the closest, to the furthest that is the most different (Greenacre, 2008:1). In this research, in both cases, hierarchical cluster analysis was used to explore the natural structure of the data by using Ward's method with squared Euclidean distances. Ward's method is a criterion applied in hierarchical cluster analysis to merge clusters with the smallest distances while keeping the sum of squares growth small (Shalizi, 2009:1). Minimising the increase in the sum of squares is done using Ward's minimum variance method that calculates the distance between cluster members and the centroid (Strauss & Von Maltitz, 2017:3). According to Strauss and Von Maltitz (2017:3):

> The centroid of a cluster is defined as the point at which the sum of squared Euclidean distances between the point itself and each other point in the cluster is minimised.

Euclidean distance is the 'ordinary' straight-line distance between two points. Ward's linkage method can only be applied to distance matrices using the squared Euclidean distance if the objective function is to have minimum variance (Strauss & Von Maltitz, 2017:3). In the case where the objective function is to minimise, Ward's minimum variance method can be written as,

$$I_{AB} = \frac{n_A n_B}{n_A + n_B}(\bar{\mathbf{a}} - \bar{\mathbf{b}})'(\bar{\mathbf{a}} - \bar{\mathbf{b}})$$

where ā and $\bar{b}$ represent the centroids of clusters A and B, respectively (Rencher, 2002:463).

Secondly, to show the difference and characteristics of the identified market segments, ANOVAs were employed. An ANOVA test is a statistical method used for comparing more than two independent groups (Choudhury, 2009:internet). This test determines whether two or more groups have different average/mean scores (Maree & Pietersen, 2007c:229). Additionally, it is only appropriate to use ANOVA tests for measuring the relationship between two or more groups if there is a normal distribution of quantitative variables in each market segment and if the variable variance is similar in all the market segments (Maree & Pietersen, 2007c:229). Similar to *t*-tests, a significant statistical difference between two or more data groups can be determined using the sig. value (*p*-value). A sig. value equal to or less than 0.05 is an indication of a statistically significant difference, whereas a value above 0.05 indicates that there is no significant difference between the data groups (Pallant, 2010:242). In addition to identifying statistically significant differences, Tukey's $B_{a,b}$ Post hoc tests are done to determine whether significant differences existed between mean values. Practical significance reveals the meaningfulness of the difference by outlining the magnitude of the differences between the means or strength of association (Kirk, 2003:13). Also, the effect sizes were calculated to show any additional and practically significant differences between the segments. Cohen's *d* is used to determine the effect size between two groups for pairwise comparisons done by Tukey's $B_{a,b}$ post hoc tests. According to Cohen's (1988:284-285) guidelines to interpret *d*, 0.02 is considered a small effect, 0.05 a medium effect and 0.8 a large effect.

Lastly, cross-tabulation was used to further determine whether statistically significant differences existed between the segments based on the socio-demographic and behavioural aspects that were categorical questions, found in the questionnaire, which could not be included in the ANOVA tests. Cross-tabulation is a statistical technique used to display a breakdown of the data by different categorical variables (Cutting, 2002:internet). By using the Chi-Square Test of Independence or Pearson chi-square test, one can determine whether an association exists between categorical variables (i.e. independent or related) (Kent State University Libraries, 2018:internet). The null hypothesis (H_0) and the alternative hypothesis (H_1) of the Chi-Square Test of Independence can be expressed by:

- H_0: Variable 1 is independent on or not associated with Variable 2

- H_1: Variable 1 is not independent of or is associated with Variable 2

In a chi-square analysis, the effect size difference is measured by phi (Φ) or Cramer's V (Fort Collins Science Center, 2018:internet). The magnitude of an effect size can be broken down as small (Φ = 0.1), medium (Φ = 0.3) and large (Φ = 0.5) (Fort Collins Science Center, 2018:internet; Sheskin, 2003:1030). This serves a purpose similar to Cohen's *d* for effect sizes in *t*-tests and ANOVAs (Cohen, 1988:25).

The next section discusses the results of the application of fore-mentioned statistical procedures.

5A.4.3.1 Identification of video gaming market segments

Dividing a market into several groups or segments based on factors, such as demographic, geographic, psychological and behavioural factors, provides a better understanding of target audiences for more effective marketing (Gunter & Furnham, 1992:1). This is called market segmentation and is used as a tool for businesses to adapt to and better communicate different target audiences' needs, wants and values (Kotler & Keller, 2009:253). Kotler and Armstrong (2005:54) define market segmentation as: 'dividing a market into distinct groups of buyers who have distinct needs, characteristics, or behaviour and who might require separate products or marketing mixes'. In short, market segmentation involves the identification and profiling of distinct groups of buyers and/or potential buyers who differ in their needs and wants (Kotler & Keller, 2012:213; McDonald & Dunbar, 2012:33).

By doing market segmentation based on psychographic variables such as personalities, motives and lifestyles can provide a holistic understanding of the different market needs and behaviours (Scholtz, Kruger, & Saayman, 2015:1251). Kruger, Saayman and Hull (2018:1) argue that by segmenting attendees to an event based on their motivations for attending an event or destination can provide a 'definitive profile and understanding' of visitor types and their respective preferences. Segmenting attendees based on their travel motivations to an event or destination has been proven to be a valuable psychographic segmentation base for marketers and researchers alike (see Alghamdi, 2014; Chiang, Wang, Lee & Chen, 2015; Ernst & Dolnicar, 2018; Fung & Jim, 2015; Pomfret & Bramwell, 2014) to identify different visitor needs and traveller behaviours, so as to adapt marketing strategies accordingly.

In the case of this study, hierarchical cluster analyses were used, by applying Ward's method with Squared-Euclidean distances, to determine the segments' structures based on the motives for playing video games and the motives for attending the rAge Expo. Only respondents who fully completed these sections in the questionnaire could be included in the

analyses. Consequently 369 respondents were included in the cluster analysis based on the motives for playing video games while 364 respondents could be included in the second analysis based on the motives for attending the Expo. The two cluster analyses were performed in SPSS Version 25 (2018) and Statistica Version 13.3 (StatSoft, Inc., 2018). Concerning the motives for playing video games, a three-cluster solution was selected as the most discriminatory (see graph on the left in Figure 5.1), whereas a four-cluster solution was selected for the motives for attending the rAge Expo (see graph on the right in Figure 5.1).

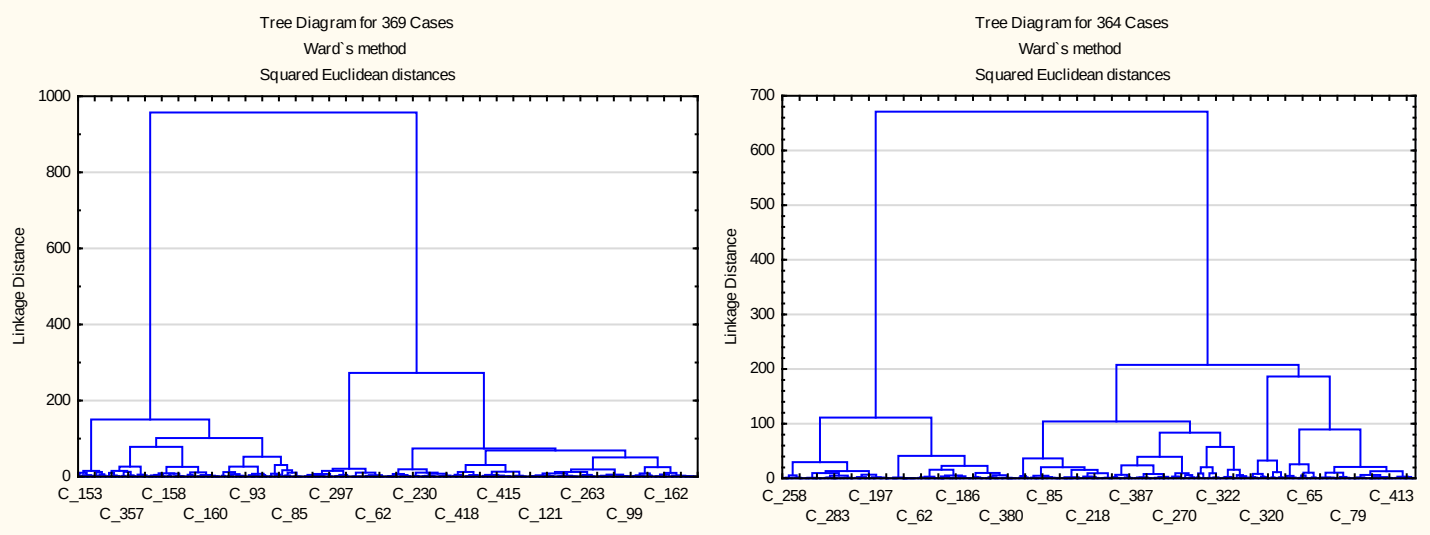

Figure 5.1: Three-segment (left) and four-segment (right) (cluster) solution: Ward's method with squared Euclidean distance measures

Source: Statistica Version 13.3 (StatSoft, Inc., 2018)

ANOVAs and Tukey's post hoc multiple comparisons tests were applied, and effect sizes were determined to investigate significant differences between the identified market segments. The results of the analyses are consequently discussed.

5A.4.3.2 Identified market segments: Motives for playing video games

In this section, respondents are clustered (segmented) in accordance with the five factors on motives for playing video games. The results of the ANOVAs and Tukey's post hoc multiple comparisons tests will be examined first followed by the results of the Chi-square tests.

5A.4.3.2.1 Results of ANOVAs and Tukey's post hoc multiple comparisons: A typology based on the motives for playing video games

The ANOVA scores, as evident from Table 5.8, show that all five motives for playing video games factors contributed to statistically significant differences between the three segments

($p \leq 0.05$). Large effect sizes are also documented amongst all three segments (Segments 1 and 2, Segments 1 and 3, and Segments 2 and 3) for all five factors. Based on each segment's rating of the motives, appropriate labels were allocated to form a video-gamer typology.

Table 5.8: Results of ANOVA and Tukey's post hoc multiple comparisons for motivational factors in the three segments on motives for playing video games

Factors	Segment 1 Intermediate gamers N = 186	Segment 2 Causal gamers N = 134	Segment 3 Hard-core gamers N = 49	F-ratio	Sig. level	Effect size differences (*d*)		
						1&2	1&3	2&3
Roleplaying	3.63[b]	2.54[a]	4.56[c]	205.17	0.001*	1.32	1.72	2.43
Social cohesion and competitiveness	3.84[b]	3.09[a]	4.59[c]	97.71	0.001*	0.92	1.23	1.85
Self-development and expression	3.53[b]	2.59[a]	4.53[c]	175.04	0.001*	1.17	1.72	2.41
Recreational escapism	4.20[b]	3.62[a]	4.85[c]	102.63	0.001*	0.85	1.37	1.79
Mental and creative exploration	3.85[b]	2.89[a]	4.67[c]	205.97	0.001*	1.29	1.75	2.38

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

As depicted in Table 5.8, Segment 2, the second largest segment with 134 respondents, is labelled *Casual gamers* since this segment had the lowest mean scores in all five factors. This could be indicative of people who are less motivated to play games and might rather play games on a casual basis. This observation is supported by the lower average hours that respondents in this segment spent playing games a day and in a week when compared both with Segment 3 and Segment 1, as evident from Table 5.10. Segment 1, the largest segment with 186 respondents, represents the *Intermediate gamers* who rated the five motives higher than Segment 2 but lower than Segment 3. This could be indicative of people who are more motivated to play video games than *Casual gamers* but are not yet as dedicated as *Hard-core gamers* (Segment 3). Supporting the label given to this segment, *Intermediate gamers* showed higher average hours playing games a day and in a week than *casual gamers* but fewer hours than *Hard-core gamers* (See Table 5.10). Additionally, on average, more respondents in this segment (41%) identified themselves as being hard-core gamers compared to Segment 2 (38%), but less than those in Segment 3 (54%) (see Table

5.12). The opposite applies to the self-identification of being a casual gamer, with the most, on average, approvals coming from Segment 2 (68%), followed by Segment 1 (64%) and Segment 3 (50%). In both scenarios, Segment 2 *(Intermediate gamers*) finds itself in the middle. Finally, Segment 3, the smallest segment with 49 respondents, is labelled *Hard-core gamers* since this segment showed the highest mean scores in all the factors. These respondents are strongly motivated by many aspects of playing video games, showing a high dedication and affinity for gaming. The majority of respondents in this segment also see themselves as being *Hard-core gamers* (54%) (see Table 5.12) and not to mention the comparatively more hours they put in playing games next to Segment 1 and Segment 2 (see Table 5.10).

ANOVAs and Tukey's post hoc multiple comparisons and effect sizes were further used to compare the segments according to socio-demographic and event behaviour, spending categories at the event, gaming behavioural aspects, factors related to motives for attending, and expo evaluation. To start, no statistically significant differences ($p \leq 0.05$) existed between the segments for socio-demographics, and event behaviour and spending averages (see Table 5.9). Although no statistically significant differences existed for these sections, some observable differences were identified and described merely for the sake of interest.

Amongst these observable differences, not statistical significant differences, show *Casual gamers* to be the eldest (23.99) of the three segments, to have the highest average income (R203 607.47), to pay for the highest average number of people at the event (1.54) but attend in smaller group sizes (average of 4.56 people), to have previously attended the event the least number of times (3.23) and to be those who stay over the least number of nights in the Johannesburg area (1.89). This could be indicative of people who are older and in a more financially stable phase in their lives whereby less time is spent on playing games and attending gaming events. On the other hand, *Hard-core gamers* are the youngest of the three segments (22.04), have attended the event the most number of times (3.84), stay over the most number of nights in the Johannesburg area (2.63) and spend the highest average amount of money per person at the event (R1 881.44). This could be indicative of devoted gamers and gaming event attendees who grew up playing games and who makes a lot of gaming-related purchase. As for intermediate gamers, their average group size are the largest (5.66), has the lowest average income and spends the lowest average amount of money per person at the event (R1 651.10). The low income of *Intermediate gamers* could be indicative of the low average spending at the event, and that travelling in larger groups could be more cost-effective. They also seem to be more devoted to attending video gaming

events than *Casual gamers* as seen by their higher annual attendance numbers (3.31 vs. 3.23) and ages at which they first heard about the event (15.63 vs. 16.43).

Table 5.9: Results of ANOVA and Tukey's multiple comparisons for socio-demographics and event behaviour, and spending categories in the three segments of motives for playing video games

Aspects	Segment 1 Intermediate gamers N = 186	Segment 2 Causal gamers N = 134	Segment 3 Hard-core gamers N = 49	F-ratio	Sig. level	Effect size differences (*d*)		
						1&2	1&3	2&3
Socio-demographics and event behaviour								
Average age (years)	22.45	23.99	22.04	2.300	0.102	0.20	0.06	0.02
Average income	R122 456.93	R203 607.47	R152 118.75	1.955	0.144	0.28	0.08	0.14
Average nights staying over	2.27	1.89	2.63	1.207	0.303	0.21	0.17	0.34
Age first heard about the rAge Expo	15.63	16.43	15.12	1.127	0.325	0.13	0.09	0.22
Number of times previously attended the rAge Expo	3.31	3.23	3.84	1.050	0.351	0.03	0.18	0.21
Average group size	5.66	4.56	5.00	1.662	0.191	0.19	0.11	0.07
Average number of people paying for a group	1.43	1.54	1.43	0.294	0.745	0.08	0.00	0.08
Average spending on categories at the event (South African Rand) (Average spending by those who have indicated financial responsibility for themselves and/or for others)								
Tickets	R314.44	R314.39	R375.87	1.053	0.350	0.00	0.22	0.22
Accommodation	R14.44	R30.73	R0	0.816	0.443	0.08	0.12	0.15
Food and beverages	R247.91	R213.35	R236.27	0.555	0.575	0.10	0.02	0.15
Merchandise	R393.91	R297.15	R566.96	1.593	0.205	0.10	0.15	0.24
Gaming accessories	R274.26	R390.98	R300.43	0.678	0.508	0.11	0.03	0.09
Video games (disc sales)	R214.79	R182.44	R293.37	1.056	0.349	0.07	0.17	0.25
Video-game consoles	R98.21	R146.34	R173.91	0.272	0.762	0.06	0.09	0.03
PC hardware	R337.57	R460.16	R185.22	0.768	0.465	0.07	0.13	0.17
PC Software	R5.33	R48.78	R134.78	2.098	0.124	0.11	0.16	0.11

Transportation	R107.77	R132.05	R120.87	0.142	0.868	0.05	0.04	0.02
Parking	R7.37	R8.09	R8.70	0.132	0.877	0.04	0.07	0.03
Contest entry fees	R4.32	R1.71	R0	0.706	0.495	0.08	0.13	0.15
Hobby accessories	R216.01	R72.76	R41.30	2.175	0.115	0.15	0.19	0.14
Other	R16.21	R6.50	R17.39	0.353	0.703	0.08	0.01	0.09
Total average spending	R2 046.12	R2 115.20	R2 322.14	0.166	0.847	0.02	0.09	0.06
Average spending per person	R1 651.10	R1 777.16	R1881.44	0.166	0.847	0.04	0.09	0.03

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

Statistically significant differences between the segments are however evident in their gaming behaviour (Table 5.10). These statistically significant differences were found for the hours spent playing video games per day ($p = 0.002$) and per week ($p = 0.001$). Statistically significant differences, with small effect size differences, are shown between *Hard-core gamers* and *Casual* and *Intermediate gamers* for average hours playing video games a day and a week. *Hard-core gamers* spend the most time playing video games (averaging 5.3 hours a day and 34.74 hours a week) as opposed to the other two segments who resembled similar averages.

Statistically significant differences among the three segments are also found for game-specific aspects regarded by respondents as important when playing a video game, including the story ($p = 0.005$), voice and sound ($p = 0.037$), music ($p = 0.006$), length ($p = 0.037$) and replayability ($p = 0.003$) (small effect size difference with only music and replayability showing large effect size differences between Segments 2 and 3), although not statistically significant ($p = 0.078$), Tukey's post hoc multiple comparisons indicated differences between the segments based on gameplay (small effect size differences). The results also show that a game's story, voice, and sound, length and gameplay are significantly more important aspects to *Hard-core* gamers when playing a video-game than is the case with *Casual gamers*. Additionally, *Hard-core gamers* found music and replayability to be significantly more important aspects when playing video games than is the case with both the *Intermediate* and *Casual gamers*. In fact, *Hard-core gamers* scored the highest mean values for the video-game aspects gameplay (mean of 4.81), the story (mean of 4.62),

voice and sound (mean of 4.16), music (mean of 3.98), length (mean of 4.47) and replayability (mean of 4.53).

Table 5.10: Results of ANOVA and Tukey's multiple comparisons for gaming behavioural aspects in the three segments of motives for playing video games

Aspects	Segment 1 Intermediate gamers N = 186	Segment 2 Causal gamers N = 134	Segment 3 Hard-core gamers N = 49	F-ratio	Sig. level	Effect size differences (*d*)		
						1&2	1&3	2&3
Age first started playing video games	8.01	8.52	7.29	2.069	0.128	0.13	0.19	0.31
Average annual games/software purchases	R4 828.08	R4 201.69	R4 498.89	0.417	0.660	0.09	0.05	0.07
Average hardware purchases spread over 5 years	R23 976.79	R22 504.46	R23 519.47	0.057	0.945	0.04	0.01	0.03
Average hours spent playing video games per day	3.9[a]	3.74[a]	5.3[b]	6.226	0.002*	0.06	0.39	0.44
Average hours spent playing video games per week	22.49[a]	20.00[a]	34.74[b]	11.290	0.001*	0.15	0.47	0.57
Game-specific aspects (level of importance when playing a game)								
1. Gameplay	4.65[ab]	4.57[a]	4.81[b]	2.572	0.078	0.12	0.26	0.34
2. Story	4.45[ab]	4.18[a]	4.62[b]	5.426	0.005*	0.26	0.21	0.42
3. Graphics	3.93	4.02	4.09	0.496	0.610	0.08	0.14	0.06
4. Voice and sound	3.90[ab]	3.75[a]	4.16[b]	3.317	0.037*	0.15	0.27	0.40
5. Music	3.53[a]	3.34[a]	3.98[b]	5.109	0.006*	0.16	0.38	0.53
6. Length	4.15[ab]	4.07[a]	4.47[b]	3.329	0.037*	0.08	0.36	0.42
7. Replayability	4.03[a]	3.88[a]	4.53[b]	5.802	0.003*	0.12	0.46	0.52

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

It is portrayed in Table 5.11 that statistically significant differences exist among the three segments for both the motives concerning attendance of the rAge Expo factors and the

evaluation of expo-related aspects. Statistically significant differences are found amongst all three segments for all four motives for attending the rAge Expo, including *following gaming developments* (p = 0.001), *gaming promotions and competitions* (p = 0.001), *social gaming development* (p = 0.001) and *gaming purchases* (p = 0.001). Large effect size differences are found between Segments 2 and 3 for all the motivational factors. Medium effect size differences are shown between all the other segments besides for *gaming purchases* which showed a small effect size difference between Segments 1 and 2 (d = 0.4). *Hard-core gamer*s scored the highest mean values for all the motives while *casual gamers* scored the lowest mean values for all motivational factors. *Hard-core gamers* showed particularly high mean values for *following gaming developments* (mean of 4.48) and *social gaming development* (mean of 4.51), while the lowest mean value is found for *Casual gamers* for *gaming promotions and competitions* (mean of 2.70). *Intermediate gamers* also identified *gaming promotions and competitions* as an undecided reason for attending the rAge Expo (mean of 3.13) but agreed with the rest of the factors as motivators for attending.

Looking at the evaluation of the expo-related factors, statistically significant differences between the three segments were found for *quality and variety of content* (p = 0.009), *affordability* (p = 0.013) and *venue management* (p = 0.001). Although not statistically significant (p = 0.065), Tukey's post hoc multiple comparisons indicated differences between the segments based on the *general organisation* (small effect size differences between Segments 1 and 3, and Segments 2 and 3). Small effect size differences were found between the segments for *quality and variety of content* (Segments 1 & 3, and 2 & 3) and *affordability* (Segments 1 and 2, and Segments 2 and 3), while a large effect size difference was found for *venue management* between Segments 2 and 3 (d = 1.00), a medium between Segments 1 and 3 (d = 0.73) and a small effect size between Segments 1 and 2 (d = 0.35). Unsurprisingly, *Hard-core gamers* scored the highest mean values for *quality and variety of content* (mean of 4.02), *affordability* (mean of 3.48), *venue management* (mean of 4.31) and *general organisation* (mean of 4.13). All three types of gamers showed the lowest mean values for *affordability,* with casual gamers having the lowest mean value (mean of 3.14), making it a neutral or undecided aspect of the event.

Table 5.11: Results of ANOVA and Tukey's multiple comparisons for motives for attending factors and the factors for evaluation of expo-related aspects in the three segments of motives for playing video games

Factors	Segment 1 Intermediate gamers N = 186	Segment 2 Causal gamers N = 134	Segment 3 Hard-core gamers N = 49	F-ratio	Sig. level	Effect size differences (*d*)		
						1&2	1&3	2&3
Motives for attending the rAge Expo								
Following gaming developments	4.05[b]	3.31[a]	4.48[c]	45.212	0.001*	0.74	0.60	1.18
Gaming promotions and competitions	3.13[b]	2.70[a]	3.76[c]	29.365	0.001*	0.53	0.76	1.29
Social gaming development	4.10[b]	3.65[a]	4.51[c]	28.972	0.001*	0.58	0.60	1.12
Gaming purchases	3.57[b]	3.20[a]	4.05[c]	15.438	0.001*	0.40	0.52	0.94
Evaluation of expo-related aspects								
Quality and variety of content	3.71[a]	3.63[a]	4.02[b]	4.792	0.009*	0.11	0.37	0.47
Affordability	3.36[ab]	3.14[a]	3.48[b]	4.408	0.013*	0.29	0.12	0.36
Venue management	3.86[b]	3.61[a]	4.31[c]	19.979	0.001*	0.35	0.73	1.00
General organisation	3.84[a]	3.82[a]	4.13[b]	2.760	0.065	0.02	0.34	0.36

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

5A.4.3.2.2 Results from the Chi-square tests

Chi-square tests with phi-values (φ) were used to identify any further significant differences between the three segments, based on the categorical variables measured in the questionnaire. This includes comparisons based on socio-demographics, Expo-related behaviour and gaming behaviour. Starting with socio-demographics (see Table 5.12), no statistically significant differences were identified between the three segments ($p \leq 0.05$). Also, no statistically significant differences were found between the three segments for either of the Expo-related behavioural aspects, as evident from Table 5.13.

Table 5.12: Chi-squares test results of the motives for playing video game segments: Socio-demographics

Socio-demographics	Reasons for playing video games segments			Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Intermediate gamers N = 186	Segment 2 Casual Gamers N = 134	Segment 3 Hard-core gamers N = 49				
Gender				0.569	2	0.752	0.039
Male	85%	86%	81%				
Female	15%	14%	19%				
Language				2.880	4	0.578	0.089
Afrikaans	33%	38%	37%				
English	60%	58%	61%				
Other	7%	4%	2%				
Marital Status				6.055	4	0.195	0.142**
Single	77%	70%	82%				
Relationship	14%	12%	11%				
Married	9%	18%	7%				
Province of residence				18.900	16	0.274	0.227**
Gauteng	85%	88%	84%				
Western Cape	1%	1%	0%				
KwaZulu-Natal	2%	3%	2%				
Free State	3%	1%	4%				
North West	1%	3%	6%				
Mpumalanga	5%	4%	2%				
Northern Cape	0%	0%	2%				
Eastern Cape	1%	0%	0%				
Limpopo	2%	0%	0%				

Level of education (busy with at the time)				7.269	10	0.700	0.189**
Primary school	1%	0%	0%				
Some High school	34%	33%	33%				
Grade 12/matric	8%	16%	21%				
Degree	43%	43%	42%				
Post-graduate degree	9%	4%	4%				
Other	5%	4%	0%				
Level of education (completed at the time)				9.445	8	0.306	0.244**
Some High school	11%	8%	4%				
Grade 12/matric	25%	30%	44%				
Degree	30%	40%	30%				
Post-graduate degree	18%	16%	4%				
Other	16%	6%	17%				
Local resident of the Johannesburg area	Yes: 69%; No: 31%	Yes: 64%; No: 36%	Yes: 69%; No: 31%	0.851	2	0.653	0.048

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

Table 5.13: Chi-squares test results of the motives for playing video games segments: Expo-related behaviour

Expo-related behavioural aspects	Reasons for playing video games segments			Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Intermediate gamers N = 186	Segment 2 Casual Gamers N = 134	Segment 3 Hard-core gamers N =49				
Type of tickets purchased							
Day tickets	Yes: 54%; No: 46%	Yes: 58%; No: 42%	Yes: 43%; No: 57%	3.408	2	0.182	0.096
Weekend tickets	Yes: 18%; No: 82%	Yes: 13%; No: 87%	Yes: 24%; No: 76%	3.289	2	0.193	0.094
NAG LAN	Yes: 26%; No: 74%	Yes: 28%; No: 72%	Yes: 31%; No:69%	0.554	2	0.758	0.039
Place of tickets purchased							
At the entrance	Yes: 43%; No: 57%	Yes: 44%; No: 57%	Yes: 43%; No: 57%	0.021	2	0.990	0.008
Online	Yes: 40%; No: 60%	Yes: 45%; No: 55%	Yes: 47%; No: 53%	1.298	2	0.523	0.060
Source of exposure							
Facebook	Yes: 28%; No: 72%	Yes: 27%; No: 73%	Yes: 30%; No: 70%	0.155	2	0.925	0.021
Twitter	Yes: 10%; No: 90%	Yes: 10%; No: 90%	Yes: 8%; No: 92%	0.146	2	0.929	0.020
Word-of-Mouth	Yes: 72%; No: 28%	Yes: 74%; No: 26%	Yes: 81%; No: 19%	1.522	2	0.467	0.065
Magazines	Yes: 31%; No: 69%	Yes: 30%; No: 70%	Yes: 36%; No: 64%	0.670	2	0.715	0.043
Radio	Yes: 9%: No: 91%	Yes: 8%; No: 92%	Yes: 11%; No: 89%	0.256	2	0.880	0.027
Websites (game-related)	Yes: 33%; No: 67%	Yes: 39%; No: 61%	Yes: 30%; No:70%	1.591	2	0.451	0.066
Computicket's website (official website for purchasing rAge tickets)	Yes: 12%; No: 88%	Yes: 14%; No: 86%	Yes: 17%; No: 83%	0.863	2	0.650	0.049
Future attendance	Yes: 92%; No 1%; Maybe: 7%	Yes: 84%; No: 1%; Maybe: 15%	Yes: 94%; Maybe: 6%	5.986	4	0.200	0.131**

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

Statistically significant differences were however found between the three segments for gaming behaviour categories: *current devices used for gaming*; *type of video-game purchases made regularly*; *preferred type of gaming*; and *genre of games played* (see Table 5.14). The statistically significant differences within each category are consequently discussed:

- **Current devices used for gaming**

There were statistically significant differences based on game consoles as a current device used for gaming (PS, XBOX, Wii) ($\varphi = 0.169$; $p = 0.006$). More *Hard-core gamers* (84%) and *Intermediate gamers* (75%) indicated consoles as a current device used for gaming than is the case with *Casual gamers* (62%).

- **Type of video-game purchases made regularly**

Statistically significant differences were found for the aspects physical discs ($\varphi = 0.186$; $p = 0.002$) and downloadable content (DLC) ($\varphi = 0.136$; $p = 0.036$).

  - **Physical discs**. Significantly more *Hard-core gamers* (76%) frequently purchases physical game discs than do *Casual gamers* (50%), but to a lesser extent than do *Intermediate gamers* (65%).
  - **DLC**. The majority of *Hard-core gamers* (61%) and *Intermediate gamers* (54%) make frequent DLC purchases, whereas the majority of *Casual gamers* do not (42% make regular DLC purchases).

- **Preferred type of gaming**

Statistically significant differences were found for competitive multiplayer ($\varphi = 0.171$; $p = 0.005$), massively multiplayer online first-person shooters/massively multiplayer online role-playing games (MMOFPS/MMORPG) ($\varphi = 0.163$; $p = 0.008$) and Local area network (LAN) ($\varphi = 0.161$; $p = 0.009$) as preferred types of gaming.

  - **Competitive multiplayer**. The majority of *Hard-core gamers* (67%) and *Intermediate gamers* (60%) prefer to play competitive multiplayer games, whereas the majority of *Casual gamers* do not (46% prefer to play competitive multiplayer games).
  - **MMOFPS/MMORPG**. More than half (52%) of *Hard-core gamers* prefer MMOFPS/MMORPG games, whereas 41% of *Intermediate gamers* prefer it and only 29% of *Casual gamers* prefer it.

- **LAN**. Significantly more *Hard-core gamers* prefer LAN gaming (63%) than do *Intermediate gamers* (42%) and *Casual gamers* (37%). The majority of *Intermediate gamers* (58%) and *Casual gamers* (63%) do not prefer LAN gaming.

- **Genre of games played**

Statistically significant differences were found between the three segments for various genres of games played, including arcade ($\varphi = 0.231$; $p = 0.001$), driving/racing ($\varphi = 0.162$; $p = 0.009$), platform ($\varphi = 0.199$; $p = 0.001$), role-playing games (RPG) ($\varphi = 0.167$; $p = 0.007$), simulation (flight, city, life) ($\varphi = 0.179$; $p = 0.003$), social network/social media ($\varphi = 0.194$; $p = 0.001$) and survival horror ($\varphi = 0.144$; $p = 0.024$).

- **Arcade**. The majority of *Hard-core gamers* play arcade games, whereas the minority of *Intermediate gamers* (42%) and *Casual gamers* (28%) prefer to play it.
- **Racing/driving**. The majority of, as well as significantly more, *Hard-core gamers* (70%) play racing/driving games than do *Intermediate gamers* as well as *Casual gamers* (46% respectively), who were in the minority.
- **Platform**. The majority of, as well as significantly more, *Hard-core gamers* (62%) play platform games than *Intermediate gamers* (39%) as well as *Casual gamers* (30%), who were in the minority.
- **RPG**. RPG games are mostly played by *Hard-core gamers* (83%), followed by *Intermediate gamers* (70%) and the *Casual gamers* (59%). A significant difference is encountered between the percentage of *Hard-core gamers* playing RPGs and *Casual gamers* playing RPGs (24% difference).
- **Simulation**. More than half of *Hard-core gamers* (51%) play simulation games than the minority of *Intermediate gamers* (34%) and *Casual gamers* (24%) who play it. A 27% difference was recorded between *Hard-core gamers* and *Casual gamers* who play simulation games.
- **Social network/social media**. More *Hard-core gamers* (32%) play social network/social media games than *Intermediate gamers* (18%) and *Casual gamers* (9%). It is also evident that only a small percentage of *Casual gamers* play social network/social media games.
- **Survival horror.** The majority of *Hard-core gamers* (68%) and *Intermediate gamers* (58%) play survival horror games, whereas the majority of *Casual gamers* do not (53% do not play survival horror games).

Table 5.14: Chi-square test results of the motives for playing video game segments: Gaming behaviour

Gaming behavioural aspects	Reasons for playing video games segments			Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Intermediate gamers	Segment 2 Casual Gamers	Segment 3 Hard-core gamers				
Current devices used for gaming							
Game consoles (PS, XBOX, Wii)	Yes:75%; No: 25%	Yes: 62%; No: 38%	Yes: 84%; No: 16%	10.382	2	0.006*	0.169**
Desktop or laptop computer	Yes: 73%; No: 27%	Yes: 80%; No: 20%	Yes: 84%; No: 16%	3.661	2	0.160	0.100**
Portable game consoles (3DS)	Yes: 26%; No: 74%	Yes: 19%; No: 81%	Yes: 33%; No: 67%	4.254	2	0.119	0.108**
Cell phone or handheld devices	Yes: 61%; No: 39%	Yes: 49%; No: 51%	Yes: 57%; No: 43%	4.374	2	0.112	0.109**
Type of video-game purchases made regularly							
Digital (full game purchases)	Yes: 66%; No: 34%	Yes: 70%; No: 30%	Yes: 65%; No: 35%	0.586	2	0.746	0.040
Physical discs	Yes: 65%; No: 35%	Yes: 50%; No: 50%	Yes: 76%; No: 24%	12.494	2	0.002*	0.186**
Downloadable content (DLC)	Yes: 54%; No: 46%	Yes: 42%; No: 58%	Yes: 61%; No: 39%	6.659	2	0.036*	0.136**
Subscription services	Yes: 23%; No: 77%	Yes: 19%; No: 81%	Yes: 24%; No: 76%	0.970	2	0.616	0.052
Online/micro-transactions	Yes: 21%; No: 79%	Yes: 19%; No: 81%	Yes: 20%; No: 80%	0.148	2	0.929	0.020
App-based games (cell, tablet)	Yes: 25%; No: 75%	Yes: 21%; No:79%	Yes: 35%; No: 65%	3.468	2	0.177	0.098
Preferred type of gaming							
Single player	Yes: 79%; No: 21%	Yes: 73%; No: 27%	Yes: 90%; No: 10%	5.756	2	0.056	0.125**
Online multiplayer	Yes: 78%; No: 22%	Yes: 72%; No: 28%	Yes: 77%; No: 23%	1.462	2	0.481	0.063
Online Co-operative	Yes: 56%; No: 44%	Yes: 50%; No: 50%	Yes: 67%; No: 33%	4.256	2	0.119	0.108**
Competitive multiplayer	Yes: 60%; No: 40%	Yes: 44%; No: 56%	Yes: 67%; No: 33%	10.766	2	0.005*	0.171**
Co-operative multiplayer	Yes: 53%; No: 47%	Yes: 47%; No: 53%	Yes: 63%; No: 37%	3.691	2	0.158	0.100**
Split-screen multiplayer	Yes: 34%; No: 66%	Yes: 29%; No: 71%	Yes: 40%; No: 60%	2.180	2	0.336	0.077
Split-screen co-operative	Yes: 29%; No:71%	Yes: 23%; No: 77%	Yes: 35%; No: 65%	3.357	2	0.187	0.096
Massively multiplayer online	Yes: 41%; No: 59%	Yes: 39%: No: 61%	Yes: 48%; No: 52%	1.145	2	0.564	0.056
MMOFPS/MMORPG	Yes: 41%; No: 59%	Yes: 29%; No: 71%	Yes: 52%; No: 48%	9.715	2	0.008*	0.163**
Local area network (LAN)	Yes: 42%; No: 58%	Yes: 37%; No: 63%	Yes: 63%; No: 37%	9.522	2	0.009*	0.161**

Genre of games played							
Action	Yes: 88%; No: 12%	Yes: 89%; No: 11%	Yes: 94%; No: 6%	1.290	2	0.525	0.060
Adventure	Yes: 85%; No: 15%	Yes: 77%; No: 22%	Yes: 87%; No: 13%	4.203	2	0.122	0.108**
Arcade	Yes: 42%; No: 58%	Yes: 28%; No: 72%	Yes: 64%: No: 36%	19.131	2	0.001*	0.231**
Driving/Racing	Yes: 46%; No: 54%	Yes: 46%; No: 54%	Yes: 70%; No: 30%	9.470	2	0.009*	0.162**
Educational	Yes: 12%; No: 88%	Yes: 8%; No: 92%	Yes: 15%; No: 85%	1.713	2	0.425	0.069
Fighting	Yes: 58%; No: 42%	Yes: 52%; No: 48%	Yes: 70%; No: 30%	4.798	2	0.091	0.116**
Fitness	Yes: 11%; No: 89%	Yes: 5%; No: 95%	Yes: 17%; No: 83%	5.950	2	0.051	0.129**
Music/Dance/Rhythm	Yes: 20%; No: 80%	Yes: 13%; No: 87%	Yes: 21%; No: 79%	3.029	2	0.220	0.092
Open world/Sandbox	Yes: 60%; No: 40%	Yes: 55%; No: 45%	Yes: 70%; No: 30%	3.398	2	0.183	0.097
Platform	Yes: 39%; No: 61%	Yes: 30%; No: 70%	Yes: 62%; No: 38%	14.162	2	0.001*	0.199**
Puzzle/Card	Yes: 29%: No: 71%	Yes: 18%: No: 82%	Yes: 32%; No: 78%	5.913	2	0.052	0.128**
Role-playing games (RPG)	Yes: 70%; No: 30%	Yes: 59%; No: 41%	Yes: 83%; No: 17%	10.028	2	0.007*	0.167**
Shooter	Yes: 80%; No: 20%	Yes: 77%; No: 23%	Yes: 85%; No: 15%	1.414	2	0.493	0.063
Simulation (flight, city, life)	Yes: 34%; No: 66%	Yes: 24%; No: 76%	Yes: 51%; No: 49%	11.440	2	0.003*	0.179**
Social network/social media	Yes: 18%; No: 82%	Yes: 9%; No: 91%	Yes: 32%; No: 68%	13.453	2	0.001*	0.194**
Sport	Yes: 35%; No: 65%	Yes: 34%; No: 66%	Yes: 32%; No: 68%	0.153	2	0.926	0.021
Strategy/Tactics	Yes: 56%; No: 44%	Yes: 53%; No: 47%	Yes: 70%; No: 30%	4.414	2	0.110	0.111**
Survival horror	Yes: 58%; No: 42%	Yes: 47%; No: 53%	Yes: 68%; No: 32%	7.453	2	0.024*	0.144**
Type of gamer (self-identification)							
Hard-core	Yes: 41%; No: 59%	Yes: 38%; No: 62%	Yes: 54%; No: 46%	3.735	2	0.155	0.103**
Casual	Yes: 64%; No: 36%	Yes: 68%; No: 32%	Yes: 50%; No: 50%	4.432	2	0.109	0.113**
Self-identification as a creative person	Yes: 62%; No: 10%; Maybe: 28%	Yes: 55%; No: 13%; Maybe: 32%	Yes: 77%; No: 4%; Maybe: 19%	7.361	4	0.118	0.143**

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

5A.4.3.2.3 Descriptive summary of the market segments: Motives for playing video games

The following section provides a brief descriptive overview of the results of the three segments (based on the motivational factors for playing video games) and is followed by recommendations in the form of 'lessons learned' made by the researcher based on these results. The summarised results can provide industry role-players with market segmentation information on different video gaming markets in South Africa. The recommendations for each segment aims to serve industry-role-players and video gaming event organisers alike, especially the rAge Expo organisers, on how to approach and grow different video gaming markets on a marketing and event organising level.

- **Segment 1: *Intermediate gamers* (represents the largest segment)**

The descriptive results for *Intermediate gamers* are summarised in Table 5.15 in accordance with a demographic profile, event profile, event motives and evaluation profile, and gaming behaviour profile. The same structure for presenting the results will be used for all segments, followed by recommendations in the form of 'lessons learned'.

Table 5.15: Summary of *Intermediate gamers*

Demographic profile	Event profile	Event motives and evaluation	Gaming behaviour
• *Intermediate gamers* are mostly male (85%), speak English (60%), are single (77%), reside in Gauteng (85%) and are local to the Johannesburg area (69%). They are also the segment with the largest percentage of attendees from Mpumalanga (5%). • Identical to *Casual gamers*, 43% of *Intermediate gamers* were busy with a degree at the time the Expo took place. Additionally, 18% (the highest of the three segments) of *Intermediate gamers* had already attained a post-graduate degree at the time of the Expo and 30% had already attained an undergraduate degree. • When looking at age, it was found that *Intermediate gamers* are older (22.45) than *Hard-core gamers* (22.04) but younger than *Casual gamers* (23.99).	• Most *Intermediate gamers* (54%) purchased day tickets for the Expo, followed by 26% who purchased NAG LAN tickets. The majority of these tickets were purchased online (60%). • Similar to Casual gamers, most *Intermediate gamers* were exposed to the rAge Expo through word-of-mouth referrals, followed by gaming-related websites (33%) and magazines (31%). • Ninety-two percent (92%) of *Intermediate gamers* indicated that they would attend the rAge Expo again in the future, with only 7% indicating maybe and 1% indicating that they will not. • *Intermediate gamers* receive the lowest average income (R122 456.93) of all three segments and are also the lowest average spenders at the rAge Expo (R1 651.10 per person). Most of their spending at the event goes towards merchandise (R393.91), PC hardware (R337.57) and ticket (R314.44) purchases. • *Intermediate gamers* attend the event in larger groups (5.66) than *Casual gamers* (4.56) and *Hard-core gamers* (5.00) and stay over on average more nights in the Johannesburg area than do *Casual gamers* (2.27 vs. 1.89 nights).	• Concerning the motives for attending the rAge Expo factors*, Intermediate gamers* were significantly more motivated than *Casual gamers* for attending the Expo, but significantly less so than *Hard-core gamers*. • *Intermediate gamers* were particularly motivated for attending the Expo for *social gaming development* (mean of 4.05) and to *following gaming developments* (mean of 4.05), but felt undecided about *gaming promotions and competitions* (mean of 3.13) as a motive for attending. • *Quality and variety of content* (mean of 3.71)*, venue management* (mean of 3.86) and *general organisation* (mean of 3.84) are factors agreed upon by *Intermediate gamers* to be good aspects of the event. They did, however, rate *affordability* (mean of 3.36) as a neutral aspect of the event.	• Most *Intermediate gamers* prefer playing games on game consoles (75%), followed by desktop or laptop gaming (73%). Sixty-one percent (61%) also identified playing on cell phone or handheld devices. • Both digital (66%) and physical disc (65%) sales were indicated amongst *Intermediate gamers* as types of video-game purchases made regularly, with the majority including DLC purchases (54%). • The most preferred genre of games played by *Intermediate gamers* were action (88%), adventure (85%) and shooter games (80%). Opposite to *Casual gamers*, the majority of *Intermediate gamers* preferred survival horror games (58%). • Although 64% of *Intermediate gamers* identified themselves as being casual gamers, this percentage is lower than that identified by *Casual gamers*. Additionally, 41% *of Intermediate gamers* identified themselves as hard-core gamers. • The number one type of gaming for *Intermediate gamers* was single-player games (79%), followed closely by online multiplayer (78%) and competitive multiplayer games (60%). • Similar to *Casual gamers* and *Hard-core gamers, Intermediate gamers* primarily play video games for recreational escapism. They are generally more motivated by all motivational factors for playing video games than are *Casual gamers* but less so than *Hard-core gamers*.

	• *Intermediate gamers* were first exposed to the rAge Expo at a younger age than *Casual gamers* (15.63 vs. 16.43 years old), but at a later age than *Hard-core gamers* (15.63 vs. 15.12 years old).		• Compared to *Casual gamers*, *Intermediate gamers* started playing games at an earlier stage in their lives (8.01 vs. 8.52 years old) but later compared to *Hard-core gamers* (8.01 vs. 7.29 years old). • Interestingly, although earning the lowest average income of all the segments, *Intermediate gamers* are the highest average spenders on video gaming software (R4 828.08 annually) and hardware (R23 976.79 spread over 5 years). • On average, *Intermediate gamers* spend a little more time per day (3.9 vs. 3.74 hours) and per week (22.49 vs. 20 hours) playing video games than do *Casual gamers*, but far fewer hours than *Hard-core gamers* (5.3 hours per day and 34.74 hours per week). • Compared to *Casual gamers*, *Intermediate gamers* identified game-specific aspects (gameplay, story, graphics, voice and sound, length and replayability) to be similarly important (but with slightly higher mean values) when playing video games. Compared to *Hard-core gamers*, *Intermediate gamers* showed lower average scores for all game-specific aspects, especially for the aspects music (mean of 3.53 vs. 3.98) and replayability (mean of 4.03 vs. 4.53). Gameplay (mean of 4.65) and story (mean of 4.45) are two of the most important aspects for *Intermediate gamers* when playing video games. • A higher percentage of *Intermediate gamers* (62%) were identified as being creative people than was the case with *Casual gamers* (55%) but less so than with *Hard-core gamers* (77%).

Source: Researcher's own compilation

Based on the summary provided in Table 5.15, the following lessons can be learned from the *Intermediate gamers*:

- *Intermediate gamers* represent the largest segment and therefore makes them the largest group for ticket purchasers. Since ticket sales are the third, on average, highest expenditure for *Intermediate gamers* and affordability the weakest identified aspect of the Expo, lowering ticket prices could lead to more sales at other stalls (PC hardware and merchandise) and improve *Intermediate gamers'* views on the affordability aspect of the event.
- As the segment with the lowest annual income and with the biggest average group size, one could provide group-packaged deals that make it more affordable for *Intermediate gamers* for attending. This could include giving discount on ticket sales to groups with five or more people or provide a beverage coupon for each member who attends in groups of five or more members.
- As the segment with the largest percentage of people speaking a language other than English or Afrikaans, bilingual staff are very important for getting information through to *Intermediate gamers*.
- Seeing that *Intermediate gamers* are also the largest group to purchase online tickets, online early-bird discounts could be given to allow *Intermediate gamers* to purchase Expo tickets well in advance at a reduced price. This might allow them more time to save money on other purchases while at the event. It is evident that they spend more on gaming software and hardware annually than *Casual gamers* and *Hard-core gamers alike*. More spending at stalls could improve the profitability of exhibitors and the likelihood that booth owners will support the Expo again in the future.
- Similar to *Casual gamers*, *Intermediate gamers* prioritise social gaming development, but they also seek to test the latest in games, gadgets and gaming hardware. Having a variety of games but also gaming gadgets and hardware available could fulfil this need. Additionally, providing social gaming booths with the latest in multiplayer and competitive multiplayer games where group members could compete with one another or with other groups could increase the attractiveness of the event for them. This could be a similar, but smaller, setup as the NAG LAN, but with rented or sponsored consoles and/or PCs.
- Similar to *Casual gamers* and *Hard-core gamers*, *Intermediate gamers* play video games for *recreational escapism*. They want to have fun, get out of their daily routine, eliminate boredom and feel challenged. Providing various game activities that get these gamers interactive could increase their mood and enhance the fun

factor. This could include physical games that one could find at arcade sections of theme parks or malls, but also old-school arcade machines with an emphasis on action shooter games that work with laser-pointer pistols.

- It has been identified in this study that the PlayStation 4 is the most popular console amongst attendees to the rAge Expo. Additionally, with the PlayStation 4 being the current generation's best-selling console and one that provides many high-quality story-driven games, prioritising these games and this console at the event could attract more *Intermediate gamers* to the Expo.
- Once again, it is important to have well-informed staff and booth personnel at the Expo, since *Intermediate gamers* are mostly very educated people seeking the latest in gaming developments and news.
- Besides word-of-mouth as the strongest form of exposure, collaborating with gaming-related websites and gaming magazines as marketing medium for the event could greatly expose more *Intermediate gamers* to the event. Having said this, the NAG Magazine could include discount coupons for the month of the rAge Expo to be used only at the Expo.
- Similar to the recommendations given for *Casual gamers*, emphasis should be placed on action, adventure, shooter, RPG, single-player and online multiplayer-games at the rAge Expo. This could also extend to video-game marketing in South Africa in general since all three segments found these genres and types of gaming to be important.

- **Segment 2: *Casual gamers* (represent the second largest segment)**

A descriptive summary of the results for *Casual gamers* is displayed in Table 5.16.

Table 5.16: Summary of *Casual gamers*

Demographic profile	Event profile	Event motives and evaluation	Gaming behaviour
• Mostly male (86%), speak English (58%), are single (70%) but also had the highest percentage of married respondents (18%), reside in Gauteng (88%) and are local to the Johannesburg area (64%). • Educated with 43% busy with a degree at the time of the event and 56% who had already attained a degree or post-graduate degree at the time of the *Expo*. • On average they are older (23.99 years) than *Intermediate gamers* (22.45 years) and *Hard-core gamers* (22.04 years) and spend the least number of nights over in the Johannesburg area (1.89 nights).	• They are generally less motivated to play video games than *Intermediate gamers* and *Hard-core gamers*, but are particularly motivated to play video games for *recreational escapism*. • Were the second highest spenders at the rAge Expo (R1 777.16 per person) with an annual average income higher (R203 607.47) than that of *Intermediate gamers* (R122 456.93) and *Hard-core gamers* (R152 118.75). • Their biggest spending at the event goes towards gaming accessories (R390.98) and PC hardware (R460.16) and they spend more on transportation costs (R132.05 than *Intermediate gamers* (R107.77) and *Hard-core gamers* (R120.87). • They travelled in smaller groups to the Expo (4.56 people) but were financially responsible for more people per group (1.54 people) than *Intermediate gamers* (1.43 people) and *Hard-core gamers* (1.43 people). • Type of tickets mostly purchased were day tickets (58%) purchased at the entrance (57%) and online (55%). • Word-of-mouth (74%) was their biggest source of exposure for the event, followed by game-related websites (39%). • The majority will attend the rAge Expo again in the future (84%), but the segment had the highest percentage of people who said they would perhaps attend again (15%).	• Compared to both *Intermediate gamers* and *Hard-core gamers, they* were less motivated for attending the rAge Expo for all motivational factors. • Particularly motivated for attending the rAge Expo for *social gaming developments* (mean of 3.65) but were least motivated by *gaming promotions and competitions* (mean of 2.70). • When evaluating the Expo, this segment generally scored lower mean values for all Expo-related factors compared to *Intermediate gamers* and *Hard-core gamers.* • Showed acceptable levels of agreement (mean values above 3.5) for all but one factor when evaluating the event and that was affordability, to which they felt undecided (mean of 3.14).	• Primarily motivated to play video games for their recreational escapism (mean of 3.62), but compared to Intermediate gamers and hard-core gamers alike are less motivated to play video games in general. • They mostly prefer gaming on a desktop or laptop computer (80%), followed by game consoles (62%) and regularly make digital (full-game purchases) (70%) and physical disc purchases (50%). They report the highest digital disc purchases and lowest physical disc purchases compared to *Intermediate gamers* and *Hard-core gamers.* • Mostly prefer single-player (73%) and online multi-player (72%) type of gaming, while the majority prefer action (89%), adventure (77%), shooter (77%), RPG (59%), open world/sandbox (55%), strategy/tactics (53%) and fighting (52%) genre games. • Most *(68%)* see themselves as being casual gamers. • Although being the biggest spenders at the rAge Expo, they spent on average less money on video-game-related hardware (R22 504.46 on average spread over 5 years) and software purchases (R4 201.69 on average annually) than *Intermediate gamers* and *Hard-core gamers.* • They spent significantly less time per day (3.74 hours) and per week (20 hours) playing video games) than *Intermediate gamers* and *Hard-core gamers.* • When playing video games, they consider music (mean of 3.34) to be the least important aspect and gameplay (mean of 4.57) the most important aspect.

			• When compared to *Hard-core gamers*, they consider gameplay (mean of 4.57 vs. 4.81), story (mean of 4.18 vs. 4.62), voice and sound (mean of 3.75 vs. 4.16), music (mean of 3.34 vs. 3.98), length (mean of 4.07 vs. 4.47) and replayability (mean of 3.88 vs. 4.53) aspects as of lesser importance. • Although the majority (55%) see themselves as being creative, this percentage is lower than that of *Intermediate gamers* (62%) and *Hard-core gamers* (77%).

Source: Researcher's own compilation

Based on the summary provided in Table 5.16, the following lessons can be learned from the *Casual gamers*:

- Being the second highest spenders, as well as the second largest group at the rAge Expo, it is important to retain future event attendance of these gamer types. Hence *Casual gamers* comprise a very lucrative market to attract and retain, viewed from an economic perspective. This could be done by providing a large variety of gaming accessories and PC hardware while keeping prices low for these items.
- It is important to get *Casual gamers* motivated to attend the rAge Expo and one way in which this could be done is by providing more opportunities for *social gaming developments* (opportunities to socialise with friends, family, people with similar interests and opportunities to educate them on the latest gaming developments). This could include activities that endorse social interaction and areas designated for families and friends to sit and relax.
- As an educated market and as a market mostly exposed to the event by word-of-mouth, providing well-informed staff can complement this market's inquisitive nature. Having plenty of staff might also provide more opportunities for *Casual gamers* to become easily and quickly updated on the latest gaming developments, especially since most only attend the Expo for a day.

- Seeing that *affordability* was rated lower, keeping ticket prices low and affordable, might endorse more future attendance and increase spending at the event.
- Marketing and promoting single-player and online multi-player action, adventure and shooter games might encourage more game purchases and also increase the event's attractiveness for *Casual gamers*.
- Compared to *Intermediate gamers* and *Hard-core gamers,* there is a higher percentage of Afrikaans-speaking attendees and as such bilingual staff in English and Afrikaans could compliment their visit.
- As mostly digital full-game purchasers, providing discount coupons for online games could encourage more game sales.
- Providing gaming stalls for couples gaming, and especially to attract more female gamers, can attract more *Casual gamers* to bring their female spouses and partners for interactive entertainment.
- As people who spend less time gaming than their peer segments and less time at the event, providing more testing or gaming booths with shorter demonstrations could get queues moving faster. The same could apply to the type of games on demonstration, providing fairly simple, pick-up-and-go games without overly complex stories or creative mechanics that are easy to play in short time-bursts.
- Although not as popular among the identified *Casual gamers*, more and more casual games are being brought to cell phones each year, and exposing these games to *Casual gamers* might peak their interest. Many of these games can also be played over shorter time spans.

- **Segment 3: *Hard-core gamers***

A descriptive summary of the results pertaining to *Hard-core gamers* is portrayed in Table 5.17.

Table 5.17: Summary of *Hard-core gamers*

Demographic profile	Event profile	Event motives and evaluation	Gaming behaviour
• The majority of *Hard-core gamers* are male (81%), but alternatively they comprise the segment with the highest percentage of females (19%). • Most *Hard-core gamers* speak English (61%), are single (82%) and at the time of the Expo were busy with high school (54%). They also represent the segment with the lowest percentage of people who had obtained a degree (30%) or post-degree (4%). • *Hard-core gamers* form the youngest segment (22.04) but have a higher annual income (R152 118.75) than *Intermediate gamers* (R122 456.93) but lower than *Casual gamers* (R203 607.47). • Although the majority of *Hard-core gamers* are from Gauteng (84%) and local to the Johannesburg area (69%), those who are not local to this area spend the highest average number of nights over (2.63) than any of the other two segments.	• *Hard-core gamers* are the highest average spenders at the rAge Expo (R1 881.44 per person) but unfortunately represents the smallest segment of attendees. They are nevertheless a very lucrative market to retain. • At the event, *Hard-core gamers* mostly spend their money on merchandise (R566.96), tickets (R375.87), gaming accessories (R300.43) and video games (R293.37). • *Hard-core gamers* previously attended the rAge Expo the most number of times (3.84 times on average) and were the youngest segment to first hear about the rAge Expo (first heard about the rAge Expo at the age of 15). • Identical to *Intermediate gamers*, the average number of people paid for per group is 1.43 people but *Hard-core gamers* attend in smaller groups than do *Intermediate gamers* (5.66 people vs. 5 people). • Although most Hard-core gamers purchased day tickets (43%), they are also the segment with the most NAG LAN ticket purchasers (31%) and weekend ticket purchasers (24%). • Identical to *Casual gamers* and *Intermediate gamers*, the majority of *Hard-core gamers* purchased their tickets at the entrance (57%). They are also the group with the lowest percentage of online ticket purchasers (53%).	• *Hard-core gamers* strongly agreed with *social gaming development* (mean of 4.51) as a motive for attending the rAge Expo, closely followed by *following gaming developments* (mean of 4.48). They also agreed with *gaming purchases* (mean of 4.05) and *gaming promotions and competitions* (mean of 3.76) as motives for attending the rAge Expo. • In general, they are more motivated than any other segment for attending the rAge Expo. • When evaluating the expo, they found all but *affordability* (mean of 3.48) to be agreeable aspects. Although affordability is rated lower compared to the other segments, it remains a neutral viewpoint among *Hard-core gamer*s.	• *Hard-core gamers* are motivated the most by all factors to play video games than are both the other segments, strongly agreeing to all factors as motivators to play video games. *Recreational escapism* (mean of 4.85) and *mental and creative exploration* (4.67) are particularly important factors for this type of gamers. • *Hard-core gamers* are the youngest average group to start playing video games (7.29) and the segment spends time playing video games per day (5.3 hours) and per week (R34.74). • On average, *Hard-core gamers* spend more on gaming software (R4 498.89) and hardware (R23 519.47 spread over the past 5 years) than *Casual gamers*, but interestingly less so than *Intermediate gamers*. • Gameplay (mean of 4.81), story (mean of 4.62) and replayability (mean of 4.53) are considered among Hard-core gamers to be the most important aspects when playing video games. They also consider all game-specific aspects to be important when playing video games, suggesting a holistic approach to experiencing a video game. • Both desktop/laptop and game consoles (84% respectively) are current devices mostly used by *Hard-core gamers* on which to play video games. They are also more likely than any other segment to play games on portable game consoles (33%). Many also play games on cell phones or handheld devices (57%).

	• The majority of *Hard-core gamers* were exposed to the event by word-of-mouth (81%), but magazines (36%), Facebook (30%) and game-related websites (30%) also played a huge role in exposure. • Of all three segments, *Hard-core gamers* are the most likely to return to future rAge Expos (yes: 94%; maybe: 6%) making them a very loyal market.		• Opposite to *Casual gamers* and *Intermediate gamers*, *Hard-core gamers* prefer to make more physical disc purchases (76%) than digital game purchases (76%). They also are the segment most likely to purchase video-game DLC (61%). • *Hard-core gamers* have a generally higher preference level for all types of gaming, especially single-player (90%) and online multi-player games (77%). They are also the segment that mostly prefers to LAN (63%); thus explaining the higher NAG LAN ticket purchases. • When it comes to genre of games being played, *Hard-core gamers* are generally more lenient towards playing all genres of game than *Casual gamers* and *Intermediate gamers*. Action (94%), adventure (87%), shooter (85%), and RPGs are the most important genres for these gamers. • Many *Hard-core gamers* also identify themselves as being hard-core gamers (54%). • *Hard-core gamers* also belong to the segment with the highest percentage of people who see themselves as being creative (77%).

Source: Researcher's own compilation

Based on the summary provided in Table 5.17, the following lessons can be learned from the *Hard-core gamers*:

- *Hard-core gamers* are the highest spenders at the rAge Expo, making them a key and lucrative market. Having various booths selling gaming-related merchandise could complement their spending behaviour. Additionally, better and/or more game discounts could also lead to higher game sales. This would also require booths selling these items to have proficient stock during the weekend when items are on promotion.
- *Hard-core gamers* are more motivated by competitions, 'freebee', promotions and discounts than any other segment. A program with regular intervals of competitions, 'happy hour' sale promotions and 'freebee' give-aways could greatly benefit this market. Once again, the use of discount coupons in the NAG magazine or at the event could greatly advance their purchase behaviour.
- Since many *Hard-core gamers* attend the NAG LAN (that means staying the night), the shopping floor could open an hour earlier for NAG LAN attendees on the Saturday and Sunday, affording them the opportunity of making their purchases before the rush.
- Seeing that many *Hard-core gamers* make physical disc purchases at the event, retail booths could potentially have PC and/or console setups where gamers can test games that are on sale/promotion. This could potentially attract the attention of such gamers, as it allows for interactive decision-making and visual appeal for the game.
- *Hard-core gamers* have a higher percentage of female gamers. As a very competitive segment and one of which the majority are single gamers, having a 'battle of the sexes' gaming competition/s could promote interactivity among genders. This, however, should not promote gender discrimination or inequality but fun interactivity, and as such should be treated in that manner. Moreover, the use of quiz games or Nintendo Switch's interactive games could be used to present these activities.
- As gamers that equally enjoy playing console games and PC games, having a sufficient variety of both types of systems present for game demonstration, could benefit this market.
- *Hard-core gamers* spend more time playing video games than any other segment, which could mean that they would probably like to have a longer time on game demonstrations. Providing demonstration booths with extended playing

time might indulge *Hard-core gamers* to do so. This can include incorporating a pay-to-play system.

- Single-player games form the most important type of games amongst all three segments. Hence, having developers working on single-player (story driven) titles talk about their upcoming games at the event could benefit all three segments. The use of questioning panels could allow for more interactivity between gamers and developers.
- Seeing that *Hard-core gamers* are creative people, providing them with opportunities to present or even compete using their creative outputs at the event might provide them with a sense of ownership or connection with the rAge Expo. This could include providing a zone where fan art or creations can be exhibited. This fan art can be auctioned-off with proceeds going to a charity/participant, or attendees can vote on a winner whereby the winner can be awarded a price.
- Scholar discounts and/or student discounts can be provided at the entrance; thus mediating for better affordability for attending the rAge Expo.

It is observed that adverse progression might exist as gamers progress in age and lifestyle (employment, income or social group size) from being more *Hard-core gamers* to *Intermediate gamers* to *Casual gamers*. By consulting the results, the older gamers get, the less intense their gaming motives and gaming behaviours become while the opposite appears to be true based on the attendance numbers of each segment to the rAge Expo. This presents a challenge for industry leaders to convince or sustain high video-game behaviours as the segments progress in age and lifestyle. Possible solutions for an aging gaming market could include reducing the price of online/digital games, having a greater online marketing presence (especially on gaming and ticket sale websites), placing a greater emphasis on family-orientated games that all ages can enjoy, focusing on popular gaming genres such as action-adventure and shooter games that can be played within shorter time-frames (shorter level designs and faster story/character progression) and increasing marketing for PC games and the PC platform.

5A.4.3.3. Identified market segments: Motives for attending the rAge Expo

In this section, respondents are clustered (segmented) in accordance with the four motivational factors for attending the rAge Expo. The results of the ANOVAs and Tukey's post hoc multiple comparison tests will be examined first, followed by the results of the Chi-square tests.

5A.4.3.3.1 Results of ANOVAs and Tukey's post hoc multiple comparisons: A typology based on the motives for attending the rAge Expo

The ANOVA scores, as evident from Table 5.18, show that all four motivational factors for attending the rAge Expo contributed to statistically significant differences between the four segments ($p \leq 0.05$). Effect size differences, ranging from small ($d = 0.2$) to large ($d = 0.8$), were also documented between the segments for all four factors. However, no meaningful effect size differences were found between Segment 3 and Segment 4 for the factors *social gaming development* and *gaming purchases.* Based on each segment's rating of the motives, appropriate labels were allocated to form a typology of the video gaming expo market.

Segment 1, the largest segment with 157 respondents, is labelled *Enthusiasts* since this segment scored the highest mean values for all four motivational factors for attending rAge compared to any other segment. This segment is indicative of people who are enthusiastic about video games and who are highly motivated to attend video gaming events. Their behaviour is backed by their high average spending per person at the rAge Expo (R2 202.724, see Table 5.19) and on average they spend more hours playing video games per day (4.27 hours) and per week (26.29 hours) than any other segment (see Table 5.20). The majority (94%) also indicated that they would attend the Expo again in the future as opposed to lower confirmations of Segments 2 (83%), 3 (86%) and 4 (86%) (see Table 5.23) making them a very lucrative market to attract and retain, viewed from both an economic and sustainability perspective.

Segment 2, the smallest segment with 36 deponents, represents the *Socialisers. Socialisers* scored an agreeable mean value of 4.06 for *social gaming development* but scored mean values less than 3 for all three other motivational factors for attending rAge. These respondents seem to be primarily focused on socialising and using the event as a way to escape from their daily routine. They attend in an average group size of 6.69 people (see Table 5.19), which is the highest average number of people travelling per group for any of the segments. They are also in the majority when it comes to NAG LAN ticket purchasers (69%) compared to the rest of the segments who are in the minority (see Table 5.23). To add to their sociable gaming approach, they indicated playing online multiplayer (81%) and LAN-gaming (56%) more than does any of the other segments (see Table 5.24).

Segment 3, the third largest segment with 84 respondents is labelled *Trend seekers* since they scored high mean values for the factors *following gaming developments* (mean of 3.76) and *social gaming development* (mean of 3.57). The reason for the label is that both these

factors include aspects related to testing and getting updated on the latest developments in gaming. Not to mention the aspect *being part of a 'geek'* culture. Their dedication to gaming developments is also strengthened by the fact that the majority of them see themselves as *hard-core gamers* (51%) compared to the other segments who do not (see Table 5.24).

Segment 4, the second largest of the segments with 87 respondents, is labelled *Casual attendees* due to their laid-back or non-competitive approach to attending the rAge Expo (scored the lowest mean of 2.04 for *gaming promotions and competitions*). Beside the low mean score for *gaming promotions and competitions, Casual attendees* are similarly motivated by the other three motivational factors for attending rAge as identified by *Trend seekers.* However, there is a small effect size difference (*d* = 0.22) for the factor *following gaming developments* between Segment 3: *Trend seekers* (mean of 3.76) and Segment 4: *Casual attendees* (mean of 3.60). Supporting the label given to this segment, respondents spend the least amount of time playing video games per day (3.30 hours) and per week (18.23 hours) compared to the other segments (see Table 5.20) and spend the least money at the event (R1 302.383 per person, see Table 5.19). Additionally, more than any other segment, these respondents purchased day tickets (72%) and made their ticket purchases mostly at the entrance (53%) (see Table 5.20).

Table 5.18: Results of ANOVA and Tukey's post hoc multiple comparisons for behavioural intention factors in the four segments based on the motives for attending the rAge Expo

Motivational factors	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87	F- ratio	Sig. level	Effect size differences (*d*)					
							1 & 2	1 & 3	1 & 4	2 & 3	2 & 4	3 & 4
Following gaming developments	4.43[c]	2.06[a]	3.76[b]	3.60[b]	157.983	0.001*	4.00	1.09	1.19	2.72	2.20	0.22
Gaming promotions and competitions	3.62[d]	2.68[b]	3.30[c]	2.04[a]	126.707	0.001*	1.30	0.45	2.22	0.86	0.89	2.28
Social gaming development	4.49[c]	4.06[b]	3.57[a]	3.58[a]	64.131	0.001*	0.73	1.37	1.21	0.73	0.64	0.01
Gaming purchases	4.13[c]	2.53[a]	3.16[b]	3.18[b]	61.965	0.001*	1.56	1.09	1.24	0.61	0.63	0.03

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] or [d] is indicated.

*Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

ANOVA results between the segments for the socio-demographic and event behaviour, and spending categories revealed statistically significant differences for *average group size* (p = 0.039) and the spending categories *tickets* (p = 0.001), and *food and beverages* (p = 0.001). No other statistically significant differences were found between the four segments as shown in Table 5.19.

In regards to the average group size, small effect sizes (d = 0.2) were found between Segments 1 and 3 (d = 20), Segments 1 and 4 (d = 0.23), Segments 2 and 3 (d = 0.29), and Segments 2 and 4 (d = 0.31). The biggest average group size was found for *Socialisers* (6.69 people), followed by *Enthusiasts* (mean of 5.43 people), *Trend seekers* (4.34 people) and *Casual attendees* (4.20 people). According to Tukey's multiple comparisons results, *Socialisers*' average group size was significantly bigger than those of *Trend seekers* and *Casual attendees*.

Tukey's multiple comparisons results for the spending categories show that *Socialisers* spend significantly more money on both *tickets* (R491.76) and *food and beverages* (R432.76) when compared to *Enthusiasts* (R329.38 and R237.47), *Trend seekers* (R335.66 and R207.79) and *Casual attendees* (R218.70 and R164.47). A large effect size difference was found between Segments 2 and 4 (d = 0.81) and small effect size differences between the Segments 1 and 2 (d = 0.48), Segments 1 and 4 (d = 0.44), Segments 2 and 3 (d = 0.46), and Segments 3 and 4 (d = 0.41) for the spending category *tickets*. Medium effect size differences were found between Segments 2 and 3 (d = 0.55), and Segments 2 and 4 (d = 0.66) for the spending category *food and beverages,* while small effect size differences existed between Segments 1 and 2 (d = 0.48), and Segments 1 and 4 (d = 0.22).

Table 5.19: Results of ANOVA and Tukey's multiple comparisons for socio-demographics and event behaviour, and spending categories in the four segments of motives for attending the rAge Expo

Aspects	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87	F-ratio	Sig. level	Effect size differences (*d*)					
							1&2	1&3	1&4	2&3	2&4	3&4
Socio-demographics and event behaviour												
Average age	22.05	24.76	23.30	23.15	1.727	0.161	0.41	0.16	0.16	0.19	0.23	0.02
Average income	R149 402.78	R215 514.29	R139 538.89	R174 158.82	0.506	0.678	0.21	0.03	0.08	0.30	0.15	0.13
Average nights staying over	1.79	2.88	2.54	2.16	2.207	0.091	0.49	0.40	0.20	0.15	0.32	0.20
Age first heard about the expo	15.21	17.62	16.15	16.01	1.902	0.129	0.43	0.15	0.15	0.23	0.29	0.02
Times previously attended the rAge Expo	3.12	3.08	3.41	3.70	1.146	0.330	0.02	0.11	0.21	0.12	0.22	0.10
Average group size	5.43[ab]	6.69[b]	4.34[a]	4.20[a]	2.826	0.039*	0.16	0.20	0.23	0.29	0.31	0.03
Average number of people paying for in group	1.47	1.66	1.47	1.30	0.771	0.511	0.13	0.00	0.13	0.14	0.25	0.14
Average spending on categories (South African Rand) (Spending on persons the respondents indicated they were financially responsible for)												
Tickets	R329.38[a]	R491.76[b]	R335.66[a]	R218.70[a]	9.165	0.001*	0.48	0.02	0.44	0.46	0.81	0.41
Accommodation	R17.12	R0.00	R26.58	R22.08	0.258	0.856	0.13	0.05	0.03	0.14	0.12	0.02
Food and beverages	R237.47[a]	R432.76[b]	R207.79[a]	R164.47[a]	6.748	0.001*	0.48	0.09	0.22	0.55	0.66	0.18
Merchandise	R445.41	R239.71	R321.05	R415.32	0.683	0.563	0.22	0.11	0.03	0.07	0.25	0.09
Gaming accessories	R392.53	R185.29	R426.97	R148.05	2.065	0.105	0.22	0.03	0.26	0.23	0.06	0.27
Video games (disc sales)	R280.45	R95.59	R148.03	R192.86	2.592	0.053	0.36	0.26	0.17	0.13	0.24	0.11
Video-game consoles	R174.66	R0.00	R70.67	R87.01	0.851	0.467	0.20	0.12	0.10	0.15	0.15	0.03

PC hardware	R507.33	R335.29	R259.21	R272.73	0.793	0.499	0.11	0.16	0.15	0.06	0.05	0.01
PC Software	R72.60	R58.82	R6.58	R0.00	0.820	0.484	0.02	0.12	0.13	0.15	0.17	0.11
Transportation	R97.90	R186.76	R76.71	R168.55	1.213	0.305	0.19	0.09	0.11	0.24	0.03	0.14
Parking	R6.37	R8.38	R9.34	R8.64	0.605	0.612	0.13	0.12	0.15	0.04	0.02	0.03
Contest entry fees	R2.95	R1.47	R5.26	R0.78	0.432	0.731	0.08	0.05	0.12	0.08	0.08	0.10
Hobby accessories	R133.60	R76.47	R209.87	R131.17	0.365	0.778	0.11	0.07	0.00	0.12	0.14	0.07
Other	R22.19	R8.82	R0.00	R19.48	0.572	0.634	0.08	0.13	0.02	0.17	0.08	0.15
Total average spending	R2 529.38	R2 003.31	R1 902.52	R1 635.28	1.905	0.128	0.17	0.19	0.28	0.03	0.14	0.08
Spending per person	R2 202.724	R1 529.057	R1 513.268	R1 302.383	2.317	0.076	0.22	0.23	0.30	0.01	0.12	0.07

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

Concerning the gaming behavioural aspects (Table 5.20), statistically significant differences were found between the segments for *average hours playing video games per week* ($p = 0.030$) and for the game specific aspects *length* ($p = 0.001$) and *replayability* ($p = 0.001$). According to Tukey's multiple comparison results no significant differences were traced between the segments for a*verage hours playing video games per week,* however small effect size differences ($d = 0.2$) were found between Segments 1 (26.29 hours) and 4 (18.23 hours), Segments 2 (24.28 hours) and 4 (18.23 hours), and Segments 3 (23 hours) and 4 (18.23 hours). Tukey's multiple comparison results for the game-specific aspect *length* revealed significant differences between Segments 1 and 2 ($d = 0.68$), Segments 1 and 4 ($d = 0.51$), and Segments 2 and 3 ($d = 0.45$). Segment 1 had the highest mean value (mean of 4.41), followed by Segment 3 (mean of 4.20), Segment 4 (mean of 3.90) and Segment 2 (3.78). Tukey's results for the game-specific aspect *length* revealed that the mean values for Segment 2 (mean of 3.58) and Segment 4 (mean of 3.61) significantly differed from those of Segment 1 (mean of 4.32) and Segment 3 (mean of 4.15). Large effect size differences were also found between Segments 1 and 2 ($d = 0.58$) and Segments 1 and 4 ($d = 0.51$), while a small effect size difference was found between Segments 2 and 3 ($d = 0.45$).

Table 5.20: Results of ANOVA and Tukey's multiple comparisons for gaming behavioural aspects in the four segments of motives for attending the rAge Expo

Aspects	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87	F-ratio	Sig. level	Effect size differences (*d*)					
							1&2	1&3	1&4	2&3	2&4	3&4
Age first started playing video games	7.90	9.31	7.91	7.78	1.651	0.177	0.31	0.00	0.03	0.31	0.34	0.04
Average annual games/software purchases	R4 227.74	R4 778.57	R4 751.10	R4 911.54	0.300	0.825	0.08	0.10	0.09	0.00	0.02	0.02
Average hardware purchases spread across 5 years	R19 760.59	R35 120.69	R26 910.45	R23 101.45	1.755	0.156	0.26	0.19	0.10	0.14	0.20	0.10
Average hours spent playing video games per day	4.27	3.90	3.87	3.30	2.383	0.069	0.13	0.14	0.35	0.01	0.20	0.24
Average hours spent playing video games per week	26.29[b]	24.28[b]	23.00[b]	18.23[a]	3.029	0.030*	0.09	0.16	0.38	0.06	0.28	0.24
Game-specific aspects (level of importance when playing a game)												
1. Gameplay	4.68	4.42	4.68	4.65	1.921	0.126	0.30	0.00	0.05	0.29	0.26	0.05
2. Story	4.49	4.22	4.36	4.30	1.413	0.239	0.26	0.14	0.21	0.14	0.08	0.06
3. Graphics	4.10	3.72	3.94	3.89	1.708	0.165	0.34	0.16	0.19	0.19	0.15	0.04
4. Voice and sound	3.88	3.61	3.87	3.98	1.307	0.272	0.23	0.01	0.11	0.23	0.32	0.11
5. Music	3.70	3.36	3.30	3.50	2.341	0.073	0.28	0.34	0.16	0.05	0.11	0.16
6. Length	4.41[c]	3.78[a]	4.20[bc]	3.90[ab]	8.512	0.001*	0.68	0.25	0.51	0.45	0.13	0.30
7. Replayability	4.32[b]	3.58[a]	4.15[b]	3.61[a]	9.664	0.001*	0.58	0.15	0.58	0.45	0.02	0.45

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

Lastly, statistically, significant differences were found between the segments in three of the four expo-related aspect factors (Table 5.21), including *quality and variety of content* (p = 0.001), *affordability* (p = 0.001) and *venue management* (p = 0.001). Concerning the factor *quality and variety of content*, the mean value found for *Enthusiasts* (mean of 3.95) was significantly higher than the mean values for *Socialisers* (mean of 3.52, d = 0.56), *Trend seekers* (mean of 3.61, d = 0.47) and *Casual attendees* (mean of 3.53, d = 0.56). The factor *affordability* revealed a significantly lower mean value for *Socialisers* (mean of 2.81) than those of *Enthusiasts* (mean of 3.50, d = 0.78), *Trend seekers* (mean of 3.28, d = 0.56) and *Casual attendees* (mean of 3.21, d = 0.48). A small effect size difference was also observed between Segment 1 and Segment 3 (d = 0.25) for the factor *affordability*. When looking at Turkeys results for the factor *venue management,* the mean value for *Enthusiasts* (mean of 4.00) was significantly higher than those of *Socialisers* (mean of 3.61, d = 0.50) and *Trend seekers* (mean of 3.65, d = 0.45). Additionally, no statistically significant differences were found between *Enthusiasts* and *Casual attendees* but a small effect size was shown to exist (d = 0.30). The same goes for effect size differences between Segments 2 and 4 (d = 0.20), and Segments 3 and 4 (d = 0.24).

Table 5.21 Results of ANOVA and Tukey's multiple comparisons for the evaluation of expo-related aspect factors in the four segments of motives for attending the rAge Expo

Evaluation of expo-related aspects	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87	F-ratio	Sig. level	Effect size differences (*d*)					
							1&2	1&3	1&4	2&3	2&4	3&4
Quality and variety of content	3.95[b]	3.52[a]	3.61[a]	3.53[a]	8.953	0.001*	0.56	0.47	0.56	0.11	0.01	0.10
Affordability	3.50[b]	2.81[a]	3.28[b]	3.21[b]	8.415	0.001*	0.78	0.25	0.33	0.56	0.48	0.09
Venue management	4.00[b]	3.61[a]	3.65[a]	3.79[ab]	6.843	0.001*	0.50	0.45	0.30	0.04	0.20	0.24
General organisation	3.99	3.72	3.74	3.87	2.40	0.068	0.31	0.31	0.16	0.03	0.17	0.16

*Statistically significant differences: $p \leq 0.05$

[a] Group differs significantly from type (in a row) where [b] or [c] is indicated.

Effect sizes: Small effect: $d = 0.2$; medium effect: $d = 0.5$; and large effect: $d = 0.8$

5A.4.3.3.2 Results from the Chi-square tests

Chi-square tests with phi-values (φ) were used to identify any further significant differences among the four segments, based on the categorical variables measured in the questionnaire. This includes comparisons based on socio-demographics, expo-related behaviour and gaming behaviour. Starting with socio-demographics (see Table 5.22), statistically significant differences ($p \leq 0.05$) were identified among the four segments for province of residence ($\varphi = 0.326$; $p = 0.032$) and level of education (busy at the time) ($\varphi = 0.349$; $p = 0.050$). When looking at the provinces of residence, significantly more *Trends seekers* (91%) resided in the Gauteng province than *Socialisers* (80%). Besides Gauteng being the province most rAge attendees reside in, it was found that 7% of *Casual attendees* came from KwaZulu-Natal, 6% of *Socialisers* from North West and 6% of *Enthusiasts* from Mpumalanga.

Concerning the level of education attendees were currently busy with at the time of the rAge Expo, the following results are evident:

- **Some high school.** Significantly more *Casual attendees* (45%) and *Enthusiasts* (36%) were busy with high school at the time of the event than *Trend seekers* (25%) and S*ocialisers* (7%).
- **Grade 12/matric.** Compared to *Enthusiasts* (14%), *Trend seekers* (10%) and *Casual attendees* (8%), a significantly higher percentage of *Socialisers* (29%) were busy with grade 12/matric at the time of the event.
- **Degree.** At the time of the event, the *Trend seekers* were the only segment to be in the percentage majority (57%) for people busy with a degree.
- **Post-graduate degree.** There is a significant difference when comparing the percentage of *Socialisers* (14%) busy with a post-graduate degree at the time of the event to that of *Enthusiasts* (4%) and *Trend seekers* (4%).
- **Other.** A reasonably higher percentage of *Socialisers* (14%) were busy with other types of educational training, besides the one's mentioned, than were *Enthusiasts* (3%), *Trend seekers* (2%) and *Casual attendees* (2%).

Table 5.22: Chi-square test results of the motives for attending the rAge Expo segments: Socio-demographics

Socio-demographics	Motives for attending the rAge Expo segments				Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87				
Gender					5.975	3	0.113	0.129**
Male	85%	72%	88%	88%				
Female	15%	28%	12%	12%				
Language					9.466	6	0.149	0.163**
Afrikaans	35%	51%	37%	24%				
English	59%	46%	56%	69%				
Other	6%	3%	7%	7%				
Marital Status					10.432	6	0.108	0.186**
Single	77%	54%	80%	74%				
Relationship	12%	23%	13%	9%				
Married	11%	23%	7%	17%				
Province of residence					38.343	24	0.032*	0.326***
Gauteng	85%	80%	91%	87%				
KwaZulu-Natal	1%	0%	2%	7%				
Free State	3%	3%	2%	1%				
North West	3%	6%	1%	1%				
Mpumalanga	6%	3%	2%	2%				
Northern Cape	1%	0%	0%	0%				
Eastern Cape	1% 2%	0%	0%	1%				
Limpopo	1%	0%	1%	1%				
Western Cape	0%	8%	1%	0%				

Level of education (busy with at the time)					24.963	15	0.050*	0.349***
Primary school	0%	0%	2%	0%				
Some High school	36%	7%	25%	45%				
Grade 12/matric	14%	29%	10%	8%				
Degree	43%	36%	57%	35%				
Post-graduate degree	4%	14%	4%	10%				
Other	3%	14%	2%	2%				
Level of education (completed at the time)					6.479	12	0.890	0.206**
Some High school	8%	9%	9%	5%				
Grade 12/matric	30%	29%	29%	30%				
Degree	34%	39%	38%	30%				
Post-graduate degree	12%	14%	21%	16%				
Other	16%	9%	3%	19%				
Local resident of the Johannesburg area	Yes: 66%; No: 34%	Yes: 53%; No: 47%	Yes: 75%; No 25%	Yes: 67%; No: 33%	5.838	3	0.120	0.127**

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

Looking at the four segments based on Expo-related behavioural aspects as shown in Table 5.23, statistically significant differences were found for *type of tickets purchased, place where tickets were purchased,* and *source of exposure*. The aspects that showed statistically significant differences within each category are subsequently discussed:

- **Type of tickets purchased**

Statistically significant differences between the segments were found for the *day tickets* (φ = 0.255; *p* = 0.001), *weekend tickets* (φ = 0.151; *p* = 0.040) and the NAG LAN tickets (φ = 0.374; *p* = 0.001).

  - **Day tickets.** The majority of *Casual attendees* (72%) purchased day tickets, followed by *Trend seekers* (54%) who were also in the majority for such ticket purchases. Opposite to this, less than half of all *Enthusiasts* (48%) purchased day tickets whereas a mere 28% of *Socialisers* purchased day tickets.
  - **Weekend tickets.** Weekend tickets showed the weakest results of all ticket purchases with purchases made mostly, on average, by *Enthusiast* at 23%, followed closely by *Trend seekers* and *Casual gamers at* 17%. Only 3% of *Socialisers* made weekend ticket purchases.
  - **NAG LAN Tickets.** *Socialisers* (69%) were well in the majority when it came to NAG LAN ticket purchases compared to *Trend seekers* (31%), *Enthusiasts* (27%) and especially *Casual attendees* (7%) who were in the minority for such ticket purchases.

- **Place where tickets were purchased**

Statistically significant differences were found between the segments for *tickets purchased at the entrance* (φ = 0.239; *p* = 0.001). More than half of all *Casual attendees* (53%) and *Trend seekers* (52%) purchased their tickets at the entrance, whereas 39% of *Enthusiasts* and a mere 12% of *Socialisers* did so.

- **Source of exposure**

Statistically significant differences were found between the segments for the sources of exposure *Facebook* (φ = 0.204; *p* = 0.002) and *Word-of-mouth* (φ = 0.209; *p* = 0.001).

  - **Facebook.** Thirty-nine percent (39%) of all *Trend seekers* heard about the rAge Expo through Facebook, followed by 31% of *Enthusiasts,* 28% of *Socialisers* and 13% of *Casual attendees.*

- **Word-of-mouth.** Significantly more *Socialisers* (92%) and to a lesser extent *Enthusiasts* (79%) heard about the rAge Expo by means of word-of-month than *Casual attendees* (66%) and *Trend seekers* (63%).

Table 5.23: Chi-square test results of the motives for attending the rAge Expo: Expo-related behaviour

Expo-related behavioural aspects	Motives for attending the rAge Expo segments				Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87				
Type of tickets purchased								
Day tickets	Yes: 48%; No: 52%	Yes: 28%; No: 72%	Yes: 54%; No: 46%	Yes: 72%; No: 28%	23.702	3	0.001*	0.255**
Weekend tickets	Yes: 23%; No: 77%	Yes: 3%; No: 97%	Yes: 17%; No: 83%	Yes: 17%; No: 83%	8.320	3	0.040*	0.151**
NAG LAN	Yes: 27%; No: 73%	Yes: 69%; No: 31%	Yes: 31%; No: 69%	Yes: 7%; No: 93%	50.826a	3	0.001*	0.374***
Place where tickets were purchased								
At the entrance	Yes: 39%; No: 61%	Yes: 12%; No: 88%	Yes: 52%; No: 48%	Yes: 53%; No: 47%	20.607	3	0.001*	0.239**
Online	Yes: 46%; No: 54%	Yes: 57%; No: 43%	Yes: 34%; No: 66%	Yes: 38%; No: 62%	6.997	3	0.072	0.139**
Source of exposure								
Facebook	Yes: 31%; No: 69%	Yes: 28%; No: 72%	Yes: 39%; No: 61%	Yes: 13%; No:87%	15.029	3	0.002*	0.204**
Twitter	Yes: 13%; No: 87%	Yes:6%; No: 94%	Yes: 13%; No: 87%	Yes: 5%; No: 95%	5.909	3	0.116	0.128**
Word-of-Mouth	Yes: 79%; No: 21%	Yes: 92%; No: 8%	Yes: 63%; No: 37%	Yes: 66%; No: 34%	15.766	3	0.001*	0.209**
Magazines	Yes: 33%; No: 67%	Yes: 25%; No: 75%	Yes: 33%; No: 67%	Yes: 31%; No: 69%	1.050	3	0.789	0.054
Radio	Yes: 9%; No: 91%	Yes: 8%; No: 92%	Yes: 11%; No: 89%	Yes: 5%; No: 95%	2.110	3	0.550	0.077
Websites (game-related)	Yes: 33%; No: 67%	Yes: 36%; No: 64%	Yes: 38%; No: 62%	Yes: 34%; No: 66%	0.737	3	0.864	0.045
Computicket's website	Yes: 17%; No: 83%	Yes: 17%; No: 83%	Yes: 18%; No: 82%	Yes: 4%; No: 96%	9.821	3	0.020	0.165**
Future attendance	Yes: 94%; No: 1%; Maybe 5%	Yes: 83%; No: 3%; Maybe: 14%	Yes: 86%; No: 0%; Maybe: 14%	Yes: 86%; No: 0%; Maybe: 14%	11.438	6	0.076	0.179**

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

Chi-square test results for gaming behaviour (see Table 5.24) show that statistically significant differences between the segments are found in several of the categories, including *current devices used for gaming*, *type of video-game purchases made regularly*, the *preferred type of gaming*, the *genre of games played,* and *self-identification as being a creative person.* The aspects that showed statistically significant differences within each category are subsequently discussed:

- **Current devices used for gaming**

Statistically significant differences were found between the segments for *game consoles* ($\varphi = 0.242$; $p = 0.001$) as a current device used for gaming. It is revealed that the majority of *Casual attendees* (78%), *Enthusiasts* (77%) and *Trend seekers* (66%) use game consoles as a current device for gaming as opposed to *Socialisers* of whom many do not (58% do not).

- **Type of video-game purchases made regularly**

Physical discs ($\varphi = 0.225$; $p = 0.001$) and *online/micro-transactions* ($\varphi = 0.182$; $p = 0.008$) were identified amongst all the types of video-game purchases made regularly to show statistically significant differences among the segments.

  - **Physical discs.** *Enthusiasts* (70%), *Casual attendees* (65%) and *Trend seekers* (53%) are in the majority when it comes to making physical disc purchases, whereas *Socialisers* (34%) are in the minority. It is also evident that a statistically significant difference was found between *Socialisers* and the rest of the attendee types when it comes to physical disc purchases made regularly.
  - **Online/micro-transactions.** Although well below 50%, more *Enthusiasts* (26%), *Socialisers* (23%) and *Trend seekers* (18%) make *Online/micro-transactions* regularly than the small percentage of *Casual attendees* (8%).

- **Preferred type of gaming**

Statistically significant differences were found between the segments for *competitive multiplayer* ($\varphi = 0.190$; $p = 0.005$)*, split-screen multi-player* ($\varphi = 0.150$; $p = 0.045$) and *LAN* ($\varphi = 0.248$; $p = 0.001$) as preferred type of gaming.

  - **Competitive multi-player.** Significantly more *Enthusiasts* (65%) prefer to play-competitive multi-player games than *Casual attendees* (35%). *Socialisers* (53%) and *Trend seekers* (51%) on the other hand have very similar interests in Competitive multi-player gaming.

- **Split-screen multi-player.** The preference base for split-screen multi-player gaming amongst all four segments is less than favourable (lower than 50% of respondents in each segment prefer it). Split-screen multi-player is least preferred by *Socialisers* (17% prefer to play it) while it is more preferred by *Trend seekers* (28%) and the most amongst *Enthusiasts* (39%) and *Causal attendees* (34%).
- **LAN.** *Socialisers* (56%) and *Enthusiasts* (52%) alike are in the majority when it comes to LAN gaming, while *Trend seekers* (42%) are in the minority and especially *Casual attendees* (22%).

- **Genre of games played**

Adventure ($\varphi = 0.181$; $p = 0.009$), *driving/racing* ($\varphi = 0.180$; $p = 0.010$) and *shooter* ($\varphi = 0.153$; $p = 0.040$) are the only three genre of games among the 18 mentioned that identified statistically significant differences among the segments.

- **Adventure.** Most *Casual attendees* (89%) and *Enthusiasts* (86%) play adventure games compared to the lesser, but still favourable, percentage of *Trend seekers* (72%) and *Socialisers* (77%) who do play it.
- **Driving/racing.** *Enthusiasts* (59%) are in the majority when it comes to playing driving/racing games, while *Casual attendees* (49%), *Trend seekers* (42%) and especially *Socialisers* (31%) are in the minority.
- **Shooter.** Significantly more *Enthusiasts* (84%), *Trend seekers* (80%) and *Casual attendees* (77%) play shooter games than *Socialisers* (63%).

- **Self-identification as being a creative person**

A statistically significant difference was found among segments when it came to the self-identification of being a creative person. Significantly, more *Enthusiasts* (68%) and *Trend seekers* (67%) regarded themselves as being creative people than did *Socialisers* (50%) and *Casual attendees* (51%).

Table 5.24: Chi-square test results of the motives for attending the rAge Expo segments: Gaming behaviour

Gaming behavioural aspects	Motives for attending the rAge Expo segments				Chi-square value	Df	Sig. level	Phi-value
	Segment 1 Enthusiasts N = 157	Segment 2 Socialisers N = 36	Segment 3 Trend seekers N = 84	Segment 4 Casual attendees N = 87				
Current devices used for gaming								
Game consoles (PS, XBOX, Wii)	Yes: 77%; No: 23%	Yes: 42%; No: 58%	Yes: 66%; No: 34%	Yes: 78%; No: 22%	20.991	3	0.001*	0.242**
Desktop or laptop computer	Yes: 77%; No: 23%	Yes: 89%; No: 11%	Yes: 77%; No: 23%	Yes: 71%; No: 29%	4.842	3	0.184	0.116**
Portable game consoles (3DS)	Yes: 28%; No: 72%	Yes: 25%; No: 75%	Yes: 22%; No: 78%	Yes: 20%; No: 80%	2.174	3	0.537	0.078
Cell phone or handheld devices	Yes: 61%; No: 39%	Yes: 44%; No: 56%	Yes: 54%; No: 46%	Yes: 55%; No: 45%	3.427	3	0.330	0.098
Type of video-game purchases made regularly								
Digital (full-game purchases)	Yes: 67%; No: 33%	Yes: 69%; No: 31%	Yes: 69%; No: 31%	Yes: 68%; No: 32%	0.104	3	0.991	0.017
Physical discs	Yes: 70%; No: 30%	Yes: 34%; No 66%	Yes: 53%; No: 47%	Yes: 65%; No: 35%	17.844	3	0.001*	0.225**
Downloadable content (DLC)	Yes: 52%; No: 48%	Yes: 46%; No: 54%	Yes: 52%; No: 48%	Yes: 54%; No: 46%	0.702	3	0.873	0.045
Subscription services	Yes: 21%; No: 79%	Yes: 20%; No: 80%	Yes: 20%; No: 80%	Yes: 23%; No: 77%	0.314	3	0.957	0.030
Online/micro-transactions	Yes: 26%; No: 74%	Yes: 23%; No: 77%	Yes: 18%: No: 82%	Yes: 8%; No: 92%	11.788	3	0.008*	0.182**
App-based games (cell, tablet)	Yes: 26%; No: 74%	Yes: 26%; No: 74%	Yes: 20%; No: 80%	Yes: 25%; No: 75%	1.074	3	0.783	0.055
Preferred type of gaming								
Single- player	Yes: 83%; No: 17%	Yes: 69%; No: 31%	Yes: 71%; No: 29%	Yes: 79%; No: 21%	5.832	3	0.120	0.127**
Online multi-player	Yes: 78%; No: 22%	Yes: 81%; No:19%	Yes: 78%; No: 22%	Yes: 66%; No: 34%	5.420	3	0.144	0.123**
Online Co-operative	Yes: 60%; No: 40%	Yes: 53%; No: 47%	Yes: 54%; No: 46%	Yes: 45%; No: 55%	5.417	3	0.144	0.123**
Competitive multi-player	Yes: 65%; No: 35%	Yes: 53%; No: 47%	Yes: 51%; No: 49%	Yes: 42%; No: 58%	13.015	3	0.005*	0.190**
Co-operative multi-layer	Yes: 55%; No: 45%	Yes: 56%; No: 44%	Yes: 53%; No: 47%	Yes: 42%; No: 58%	3.979	3	0.264	0.105**
Split-screen multi-player	Yes: 39%; No: 61%	Yes: 17%; No: 83%	Yes: 28%; No: 72%	Yes: 34%; No: 66%	8.062	3	0.045*	0.150**
Split-screen co-operative	Yes: 32%; No: 68%	Yes: 17%; No: 83%	Yes: 23%; No: 77%	Yes: 28%; No: 72%	4.647	3	0.200	0.114**
Massively-multiplayer online	Yes: 42%; No: 58%	Yes: 42%; No: 58%	Yes: 40%; No: 60%	Yes: 36%; No 64%	0.818	3	0.845	0.048

MMOFPS/MMORPG	Yes: 40%; No: 60%	Yes: 42%; No: 58%	Yes: 39%; No: 61%	Yes: 29%; No: 71%	3.232	3	0.357	0.095
Local area network (LAN)	Yes: 52%; No: 48%	Yes: 56%; No: 44%	Yes: 42%; No: 58%	Yes: 22%; No: 78%	22.183	3	0.001*	0.248**
Genre of games played								
Action	Yes: 93%; No: 7%	Yes: 83%; No 17%	Yes: 86%; No: 14%	Yes: 89%; No: 11%	4.184	3	0.242	0.109**
Adventure	Yes: 86%; No 14%	Yes: 77%; No: 23%	Yes: 72%; No: 28%	Yes: 89%; No: 11%	11.545	3	0.009*	0.181**
Arcade	Yes: 46%; No: 54%	Yes: 31%; No: 69%	Yes: 35%; No: 65%	Yes: 42%; No: 58%	4.332	3	0.228	0.111**
Driving/Racing	Yes: 59%; No: 41%	Yes: 31%; No: 69%	Yes: 42%; No: 58%	Yes: 49%; No: 51%	11.399	3	0.010*	0.180**
Educational	Yes: 12%; No 88%	Yes: 3%; No 97%	Yes: 10%; No: 90%	Yes: 14%: No: 86%	3.487	3	0.322	0.100**
Fighting	Yes: 64%; No: 36%	Yes: 45%; No: 54%	Yes: 58%; No: 42%	Yes: 54%; No: 46%	4.955	3	0.175	0.119**
Fitness	Yes: 12%; No: 88%	Yes: 0%; No: 100%	Yes: 12%; No: 88%	Yes: 7%; No: 93%	6.232	3	0.101	0.133**
Music/Dance/Rhythm	Yes: 22%; No: 78%	Yes: 17%; No: 83%	Yes: 12%; No: 88%	Yes: 18%; No: 82%	3.614	3	0.306	0.101**
Open world/Sandbox	Yes: 64%; No: 36%	Yes: 63%; No: 37%	Yes: 49%; No: 51%	Yes: 58%; No: 42%	4.787	3	0.188	0.117**
Platform	Yes: 41%; No: 59%	Yes: 31%; No: 69%	Yes: 35%; No: 65%	Yes: 42%; No: 58%	1.955	3	0.582	0.075
Puzzle/Card	Yes: 29%; No: 71%	Yes: 20%; No: 80%	Yes: 26%; No: 74%	Yes: 26%; No: 74%	1.231	3	0.746	0.059
Role-playing games (RPG)	Yes: 68%; No: 32%	Yes: 60: No: 40%	Yes: 67%; No: 33%	Yes: 71%; No: 29%	1.520	3	0.678	0.066
Shooter	Yes: 84%; No: 16%	Yes: 63%; No: 37%	Yes: 80%; No: 20%	Yes: 77%; No: 23%	8.290	3	0.040*	0.153**
Simulation (flight, city, life)	Yes: 38%; No: 62%	Yes: 29%; No: 71%	Yes: 31%; No: 69%	Yes: 31%; No: 69%	2.334	3	0.506	0.081
Social network/social media	Yes: 18%; No: 82%	Yes: 9%; No: 91%	Yes: 22%; No: 78%	Yes: 12%; No: 88%	4.991	3	0.172	0.119**
Sport	Yes: 36%; No: 64%	Yes: 14%: No: 86%	Yes: 37%; No: 63%	Yes: 34%; No: 66%	6.741	3	0.081	0.138**
Strategy/Tactics	Yes: 59%; No: 41%	Yes: 60%; No: 40%	Yes: 57%; No: 43%	Yes: 52%; No: 48%	1.005	3	0.800	0.053
Survival horror	Yes: 60%; No: 40%	Yes: 49%; No: 51%	Yes: 59%; No: 41%	Yes: 44%; No: 56%	6.696	3	0.082	0.138**
Type of gamer (self-identified)								
Hard-core	Yes: 41%; No: 59%	Yes: 37%; No: 63%	Yes: 51%; No: 49%	Yes: 34%; No: 66%	4.705	3	0.195	0.116**
Casual	Yes: 65%; No: 35%	Yes: 69%; No: 31%	Yes: 56%; No: 44%	Yes: 70%; No: 30%	4.128	3	0.248	0.109**
Self-identification as being a creative person	Yes: 68%; No: 6%; Maybe: 26%	Yes: 50%; No: 19%; Maybe: 31%	Yes: 67%; No 10%; Maybe: 23%	Yes: 51%; No: 14%; Maybe: 35%	12.729	6	0.048*	0.189**

*Statistically significant differences: $p \leq 0.05$; Phi-value: **small effect = 0.1; ***medium effect=0.3, ****Large effect = 0.5

5A.4.3.3.3 Attracting and retaining video gaming expo market segments

It is evident from the results that the four segments based on the motives for attending the rAge Expo are not homogeneous. The following section thus serves to provide practical marketing/management strategies for each segment based on key observational differences between the segments. The recommendations provided serve to attract and/or retain attendees of different profiles and needs to the rAge Expo and are primarily aimed at the organisers of the event. Organisers with a similar type of gaming events or with events that have similar gaming-related activities to that of rAge (LAN activities, game tournaments, retail shops, demo exhibits, gaming competitions etc.) can also benefit from the segment recommendations. The descriptive findings and practical marketing/management strategies formulated for each segment are as follows:

- **Recommendations and strategies: *Enthusiasts***

The majority of attendees to the rAge Expo are *Enthusiasts.* Most *Enthusiasts* are single (77%), male (85%) and English-speaking (59%) attendees (77%) who reside in the province of Gauteng (85%) and of whom 66% are local to the Johannesburg area. They are also the youngest attendees (22.05 years average) and spend the largest amount of money at the event (R2 202.72). This makes them a young but highly influential and lucrative market for the event. The following table (Table 5.25) provides some of the key findings on this market with recommendations and strategies to attract and retain this market for future events.

Table 5.25: Recommendations and strategies pertaining to *Enthusiasts*

Key aspects	Observation	Recommendations	Practical marketing/management strategies
Motives for attending the rAge Expo	Highly motivated to attend rAge for *social gaming development* and to *follow gaming developments*	Provide more opportunities for *Enthusiasts* to meet, interact and socialise and become updated on the latest in game developments	• More seating areas for socialising activities. • Having two-way panels where visitors can interact with game developers. • Having well-informed and trained staff at information points and demo booths. • Include demo booths where attendees can compete or co-operatively play. • Provide a variety of games to be tested, as well as gadgets.
	More motivated by *gaming promotions and competitions* than any other segment for attending the Expo.	Provide more opportunities for *Enthusiasts* to compete and win prizes and to get promotional benefits.	• Discount coupons can be handed out at the entrance on items at selected booths • Having 'happy hour' deals at selected booths that provide timely discounts. • Getting more sponsors to provide 'free bees' at the event • Having regular intervals of competitions for 'free bees', ranging from quiz competitions to puzzle or physical activities such as throwing hoops.
Age and education	The youngest of all four segments	To create and retain greater awareness of the event among young people.	• Ticket discounts can be provided for scholars or students. • Using posters or fliers at local schools or universities to market the event to this mostly student or scholar market. • Use of social media campaigns that market the event on school Facebook pages or on university groups.
Spending at the event	The highest spenders at the event but the lowest average income group	Focus on providing more variety and better prices on merchandise, PC hardware and gaming accessories.	• Get more sponsors or booths at the event that deals with gaming and geek culture merchandise. • Subsidise rent for stalls that provide 'free bees' or discounted products to encourage more promotional material at the event. • Keeping ticket prices and food and beverage prices low to potentially increase spending at other retailers. This could be done by using more local entrepreneurs and suppliers, making it cheaper to relocate a stall and transport stock to the event or to ask less for stand to dealers who have to travel far. • As low spenders at the event it is important to communicate with exhibitors to keep prices low and/or provide sufficient discount on items sold. This also includes having sufficient stock at the event on merchandise and PC hardware.
Hours spent playing games	The segment with the highest average hours spent playing games	Provide opportunities where *Enthusiasts* could spend more time playing or testing games.	• Giving attendees more time to demo games might negatively affect queue length, but providing additional pay for playing demo booths could give attendees more time for playing and experiencing a bit of the story and get a better feel of the gameplay.

Game-specific aspects	Gameplay and story are very important aspects when playing games.	Market video games focussing on story and gameplay.	• Have a variety of story-driven games at testing booths. • Invite game developers or publishers to talk about their narrative-driven games. • Avoid game demos with overly complex game mechanics or with a strict learning curve; rather have informed people demo and/or talk about these games. • As a segment that enjoys lengthier and more repayable games, 'pay for playing' booths could allow gamers more demo time, while having more than one demo per game could provide variety and replayabilty.
Evaluation of expo-related aspects	Affordability is rated the weakest event evaluation factor amongst *Enthusiasts*	Provide a reasonable and affordable pricing structure for attendees.	• Keep ticket prices and food and beverage prices low at the event. • The use of online 'early-bird' discount or group discounts on ticket sales might encourage more online ticket sales. • Ticket discount could also be given at the entrance to groups of 5 people and more, benefitting *Enthusiasts* and C*asual gamers* alike.
Current devices used for gaming	Segment with the highest percentage of cell phone or handheld device (61%) gamers	Provide more opportunities and information on cell phone games.	• Cell phone games is the fastest growing sector of the video-game industry and providing information on these games can greatly increase the event's attractiveness for *Enthusiasts.* • Include gaming booths where people can demo games on cell phones or tablets
Regular type of game purchases made	*Enthusiasts* mostly prefer physical disc purchases	Provide a variety of stalls selling physical games.	• Having a variety of stalls selling physical and/or second-hand games can be greatly appealing to *Enthusiasts.* • Discounts on physical games might also see an increase in purchases made.
Preferred type of gaming	More than any other segment, *Enthusiasts* prefer competitive multi-player and single-player games	Provide more opportunities where individuals and groups can compete against one another and play together.	• For those who do not attend the NAG LAN and do not bring their own gaming device, special booths could be set up where players can compete against each other on consoles/PCs. This could be pay for playing booths. • Another way to get *Enthusiasts* involved is to host small tournaments that could appeal both to their competitive nature and to the possibility of winning prizes. Getting sponsors to sponsor different tournament prizes for different games can keep the audience different and involved.
		Have various single-player games on show.	• Have various demo booths with single-player games. • Encourage retailers to have discount deals on single-player games. This includes focusing their marketing efforts on these games.
Source of event exposure	Besides word-of-mouth, magazines are a popular medium of exposure	Approach local gaming magazines, or use the NAG magazine, in promoting the event.	• Coupons can be placed in issues throughout the year as discount vouchers for the upcoming rAge Expos. This could benefit magazine sales as well as remind people of discounts available when attending the rAge Expo. • Research done at the rAge Expo and published in local gaming magazines make for informative exposure regarding the event.

Genre of games played	The most popular genre of games amongst enthusiasts include action, adventure, shooter, rpg, open world/sandbox, fighting, horror, driving/racing and survival horror.	Emphasise the promotion of these genres at the event.	• Marketing of these genres at the event (banners, posters and fliers) and over social media (Twitter and Facebook) could catch the attention of potential *Enthusiasts* for attending the event. • Since many *Enthusiast* purchase merchandise, getting retailers to sell genre-appropriate merchandise could potentially increase their sales. • Use the imagery of action games on marketing material to attract *Enthusiasts*. • Provide popular series of action games and a variety of it to be tested. • More *Enthusiast* play driving/racing games than any other segment; thus it is important to at least have one booth dedicated to this genre. This could be any VR racers, a simulated racing setup with wheels and peddle or a multi-PC/console booth where groups can compete against one another. • Avoid spending resources promoting fitness, educational or social media games as it is the least important genre amongst all of segments, but it could be used however as a method to win prizes or give away excess 'free bees'.
Self-identification as being a creative person	The segment with the highest percentage of people who see themselves as being creative	Provide more opportunities to promote creativity and creation at the event.	• Having competitions at the event promoting fan art, comics, music or any other media of artistry. • The selling of fan art at the event can provide attendees with a sense of ownership at the event.

Source: Researcher's own compilation

- **Recommendations and strategies: *Socialisers***

The smallest segment to the rAge Expo is *Socialisers. Socialisers* are the segment with the highest percentage of females (28%) and one of which the majority is Afrikaans-speaking (51%). Fifty-four percent (54%) of Socialisers are single but have the highest percentage of respondents who are in a relationship (23%) and married (23%). *Socialisers* are also the eldest segment (24.76) for attending the rAge Expo with 20% of its attendees not from the Gauteng province and 47% not local to the Johannesburg area. *Socialisers* are the highest average annual income group (R215 514.29) and the second highest spenders at the event (R1 529.06 per person). Key findings, recommendations and strategies are identified in Table 5.26 to attract and retain the *Socialisers* market for future events.

Table 5.26: Recommendations and strategies aimed at *Socialisers*

Key aspects	Observation	Recommendations	Marketing/management strategies
Motives for attending the rAge Expo	Motivated by *social gaming development* and far less by any other motivational factors.	Increase opportunities for social interaction activities and update attendees on the latest in gaming developments.	• The primary motive of *Socialisers* for attending the rAge Expo is to socialise with friends, family and other gamers. Providing social activities for people to interact, such as social-game booths, table-top gams areas, lounge areas, outside arcade/recreation equipment and activities (go-carts or wall climbing). • Provide several areas throughout the Ticketpro Dome with seating areas where people can relax and have conversations. • Similar to NAG LAN, a zone can be opened to people who only want to LAN with friends for the day. These tickets could be sold at a reduced price. • *Socialisers* also attend the Expo to get away from their daily routine. The use of VR setups and/or gaming props and decorations placed across the Expo could provide a more visually escapism feeling. • Use twitch, podcasts or YouTube to talk about the Expo and have 'fans' or listeners ask questions and make comments.
Spending	Highest average annual income group and second highest spenders at the rAge Expo	Stimulate their spending habits at the rAge Expo.	• *Socialisers* mostly spend their money on tickets, food and beverages and PC hardware. Lowering ticket prices and food and beverage prices might increase their spending on other items at the rAge Expo, benefiting the exhibitors/retailers (specifically PC hardware retailers). • Having a variety of food and beverage outlets might benefit *Socialisers* with choice. • Discounted food vouchers or food coupons with ticket sales could also encourage the likelihood of food purchases. • Discounts on PC hardware items in particular might increase sale opportunities for PC retailers at the event, since socialisers are identified as the biggest spenders on gaming hardware.
Age	The eldest of all four segments	Market more mature games for this more mature audience.	• Games that have age restrictions should not be allowed for testing amongst attendees who do not adhere to the appropriate age. This would allow quicker access for more mature attendees to test these games. • Alternatively, accompanying parents/adults with their supervision might see younger attendees testing more mature content or games. This could encourage more parents or adults to come to the rAge Expo, especially by their kids.
Group size	The segment with the largest average group size and most people paid for by one person	Support and provide benefits to large group sizes.	• Packaged deals on ticket prices can be provided for large group sizes. This could make it cheaper for *Socialisers* who pay for more than one person. • Provide seating areas or lounge areas that support large groups (5-7 people). • Provide activities that support large groups for playing or interacting together. For example, Star Trek: Bridge Crew is a VR game where gamers can play together in a simulated environment.

Hours spent playing games	The segment that spends the second most hours playing video games	Provide more and uninterrupted opportunities for longer periods of social play.	• As mostly PC gamers have booths set-up for PC LAN with competitive multiplayer games, s Socialisers can rent these booths for playing for longer periods of time. • Since many socialisers are also NAG LAN attendees, have mobile food and beverage vendors make rounds at the NAG LAN. This could keep socialisers in their game without needing to get up and get food, but also keep them in the action of longer periods of play.
Evaluation of expo-related aspects	Affordability, and quality and variety *of content* are weakest rated aspect of the event among socialisers.	Provide more variety of demo booths, retail shops and game developers. Have good internet speeds. Lower prices to make the event more affordable.	• Approach more developers to present their games at the event. This can include approaching gaming YouTubers. • Approach more retailers involved in 'geek culture' retailing to exhibit at the rAge Expo. This can include not only a variety of video games but also other areas such as comic books, movies and table-top games. • Internet speed is very important for an Expo such as rAge, requiring active appropriate risk plans in case failures arise. • Lowering prices of venue-related prices (tickets, food and beverages, and parking prices) could make it more affordable for socialisers to attend the event and spend more money on other event retailers.
Gender	The segment with the highest percentage of female attendees	Have a variety of games that are loved my many female gamers	• Although video games are universal and accessible to both genders, having testing booths with games popular among female gamers could be beneficial to the event's diversity. According to results in this study, many female gamers identified Counter-Strike: Global Offensive, Assassins Creed, Tomb Raider, Skyrim, Fallout, Call of Duty, DOTA 2, Dragon Age and Sims as some of their favourite games. • Incorporate more games for testing that allows players to pick their own gender in character creation.
Language	Most socialisers are Afrikaans-speaking (51%)	As the segment with the highest percentage of Afrikaans-speaking attendees, it is recommended to employ bilingual staff.	• Employ staff that are bilingual at information points and demo booth as it allows for Socialisers to be more comfortable in speaking their own language.
Relationship status	The highest percentage of married attendees.	Provide more activities for married couples and befriended couples to interact or compete together.	• Marketing the event as a family event can encourage more couples and/or families with kids for attending. • Many spouses are not always similarly interested in video games; thus providing interactive activities outside the realm of video games could allow for other forms of couple interaction. This could be activities such as throwing hoops or having Air Hockey tables • Using cooperation arcade machines or dance-off areas can make for fun-couples gaming experiences. The same can be said for using Nintendo's Switch games for social play (e.g. 1-2-Switch).

Province of residence	Most *Socialisers* (80%) are from Gauteng but 8% are from the Western Cape.	Provide benefits to those that have travelled far for attending the rAge Expo	• Providing travel discount on tickets for attendees who live outside the Gauteng province can encourage a more diverse audience of South African gamers to attend. • Free parking areas can be reserved for people with licence plates that are not of Gauteng. • Co-operation with local accommodation and/or transport services could present the opportunity to provide combo tickets that includes tickets and accommodation in one package.
Tickets purchased	Most *Socialisers* purchased NAG LAN tickets (69%) with 57% purchasing their tickets online.	Retain NAG LAN ticket sales amount *Socialisers* but also attract new *Socialisers* to participate in the NAG LAN.	• Discounts on tickets or a food and beverage coupon can be provided to NAG LAN attendees residing outside Gauteng. • All-inclusive meal tickets could be included at a higher price for those wishing to attend the NAG LAN. These tickets should provide discount value as compared to making individual food purchases.
Source of event exposure	More than any other segment, Socialisers where exposed to the event by word-of-mouth.	Ensure satisfactory feedback from attendees who have attended rAge.	• It is important to have high quality and diverse content at the event, while also keeping prices affordable. This could potentially attract more *Socialisers* as word gets out. • Keep the event a highly social and interactive affair, building on its community creation aspects to keep *Socialisers* coming back for more. This could include conducting interviews with attendees or using videos or photos of attendees as testimonies for marketing the event. • Have someone live-stream the event and its many exhibitors. Use a professional camera man or a famous local YouTubers to do this.
Current devices used for gaming	More than any other segment, socialisers prefer PC gaming	Promote a 'PC Master Race' profile but also promote sales on PC components.	• Many PC gamers like to 'brag' about their PC builds and that PC is far superior to home consoles. Promote opportunities/competitions where gamers can 'show-off' their PC systems. This could be by running GPU- and CPU-accelerated tests and/or 'showing-off' the visual designs of their systems. • Since many *Socialisers* are NAG LAN attendees, allow shops to open an hour or half an hour earlier on the Saturday and Sunday to allow these attendees to make their purchases.
Type of video-game purchases made regularly	Digital disc sales are most popular among *Socialisers*	Have digital game disc sales at the rAge Expo.	• Many PC games today are sold by digital codes and by selling these codes at reduced prices could benefit *Socialisers.*
Preferred type of gaming	The segment with the highest percentage of people who prefer online multi-player games and LAN.	Provide plenty opportunities for multi-player gaming at rAge.	• *Socialisers* travelling in groups can be assigned into teams if they so wish to. These teams can play against one another at NAG LAN or be assigned PC booths. This is all voluntary and teams specialising in different games can compete. Prizes or 'free bees' could also be awarded to winning teams seeing that *Gaming promotions and competitions* are the second highest motivational factor for *Socialisers* (mean of 2.68) for attending the rAge Expo. • Have Alpha or Beta-stage multi-player games available for testing at the event (Example, the next iterations of Call of Duty or Battlefield). • Provide stable high-speed internet connections.

Genre of games being played	*Socialisers* show lower percentages in almost all genres of games played, particularly shooter games, except for strategy/tactics games	Promote upcoming strategy/tactic games and have information available on the latest developments in current strategy/tactic games	• Information banners could be placed throughout the event, particularly at the NAG LAN identifying popular action, adventure, shooter, open world and strategy games. This could educate social gamers on potentially new games where they can play and create new online communities. • Seeing that strategy games have a stricter learning curve than say shooter or adventure games, rather than having the public test it, have advanced gamers or developer talk about these games. This could avoid having people waiting in long queues. • With all segments agreeing on action, adventure, shooter, RPG and strategy games as genres being played most, organisers should focus and accommodate more of these genres to be marketed, promoted and tested at the rAge Expo.

Source: Researcher's own compilation

- **Recommendations and strategies: *Trend seekers***

The third largest segment of attendees to the rAge Expo is *Trend seekers.* Most *Trend seekers* are male (88%), English-speaking (56%) and single (80%), with 91% of *Trend Seekers* living in the Gauteng province of which 75% are local to the Johannesburg area. *Trend seekers* are also the lowest average annual income group (R139 538.89) but the third highest spenders at the rAge Expo (R1 513.27 per person). Table 5.27 provides a summary of the key findings with accompanying recommendations and strategies to attract and retain the *Trend seekers* market for future events.

Table 5.27: Recommendations and strategies aimed at *Trend seekers*

Key aspects	Observation	Recommendation	Practical marketing/management strategies
Motives for attending the Rage Expo	Mostly motivated by following gaming developments and social gaming development as reasons for attending rAge	Provide sufficient information on various games and developments in the gaming industry.	• Have a variety of technology on display and to be tested particularly new technologies in the gaming industry such as AR, VR and the latest in PC and console hardware and accessories. • Many of these attendees would be queued-up waiting to test their favourite upcoming games and these are good opportunities to provide attendees with activities to interact. This could distract them from lengthy wait periods.
		Provide various quality booths where people can test upcoming games.	• Provide well-informed staff at demo booths that are very knowledgeable on the games and on demonstration. • Provide a variety of booths focusing on popular genres of games such as action, adventure, shooter and RPGs.
Income	The segment with the lowest average annual income	Provide an affordable Expo experience for *Trend seekers.*	• *Trend seekers* are not the lowest spender at the event but they do consider affordability to be a problem. Keep prices low, especially ticket prices since they are the segment with the second highest spending on ticket prices. • Use cheap food fast-food vendors to sell food at the event or use a buffet area where one could select one's own pre-made food. This could give everyone the option of having smaller cheaper or larger more pricier selections.
Spending at the Rage Expo	Most purchases made at the event are on gaming accessories, tickets, merchandise and PC hardware.	Provide a variety of stalls that retail gaming merchandise and gaming accessories.	• As mostly PC gamers and console gamers, sufficient and varied stalls should sell gaming accessories for these devices. • Very few stores in South Africa sell gaming merchandise. The event should use this to its advantage by attracting many various merchandise merchants to sell gaming and geek culture memorabilia, costumes/clothes, board games, figurines and many more related objects. Use this as a marketing advantage for the event, potentially attracting other 'geek; culture enthusiast.
Nights staying over	Many *Trend seekers*, stay over up to three nights in the Johannesburg area	Be more accommodative towards attendees staying over several nights as a result of the event	• In collaboration with local accommodation organisations, rAge could help market potential places attendees could stay in. This could be done on their website or Facebook page. Packaged deals could also be negotiated with local guest houses or hotels. • Many *Trend seekers* also attend the NAG LAN, and this could explain their longer length of stay. Providing stretchers for rent or selling other types of sleeping accessories (sleeping mask and ear plugs) could benefit those struggling to sleep while spending the night at the venue.
Hardware purchases	Segment with the second most gaming hardware purchases made, spread across a 5-year period.	Have a variety and affordable collection of gaming hardware items.	• Although having been the lowest income group, many spent a high amount of money on gaming hardware. By keeping ticket prices, parking prices and food and beverage prices low many *Trend seekers* might seek to spend more money on gaming hardware at the event. • Determine the discount retailers of hardware will be offering at the event and use this as a marketing strategy for the event.

Game-specific aspects	Game-specific aspects are rated similar to those of *Enthusiasts*	See Table 5.25	See Table 5.25
Gender	Highest percentage of male and single gamers and lowest percentage of married gamers.	Accommodate opportunities for people of different genders to meet and socialise.	• Attract more female gamers to the event by marking the event as a gender-neutral expo. An example would be having both a guy and girl anime poster person representing the event's mascot. • Approach and employ locally famous Coplay females to interact and take photos with their fans. • Invite female and male gaming YouTubers and Twitch streamers to interact with their fans. • Implement more booths with popular games played among females.
Education	Most academically educated attendees (highest percentage of degree and post-graduate degree-related education).	Provide many informative and educative opportunities on gaming developments.	• Employ highly informative staff at testing and demo booths. • Present courses educating and training staff before the event. • Encourage exhibitors to employ staff that are very educated on the subject matter of their stalls. • Present research on video gaming at the event. This could include local research on sale numbers and popular games to new findings on the effect of video games in education, physiology, technology and future trends. Keeping people educated could create a greater understanding, appreciation and awareness of video games and its impact on today's society. • Provide some kind of TED Talk at the events where research can be presented; people can talk about personal experiences in gaming or even the addictiveness, misuse or misunderstanding of gaming in today's society. • Have universities/colleges/independent institutions talk about their game development or visual design degrees or courses. Using a variety of these institutions could present a variety of course options form short after-hour programmes to full-time courses.
Province of residence	The segment with the highest percentage of local Johannesburg residents and residents living in the Gauteng province.	Promote the locality of the event to give it a sense of ownership amongst local residents	• Focus marketing efforts on Johannesburg's highly populated areas. • Use the events history, size, number of exhibitors, attendees, gaming developers, gaming teams and publishers to its advantage when advertising the event. Emphasising this information together with the locality aspect of the event can inspire a sense of community and pride among local gamers. • Supporting local charities or schools with computers and educational games or investing in research that supports the advancement of the local gaming industry could also improve public relations.
Place of tickets purchased	The majority of *Trend seekers* purchased their tickets at the entrance.	Make queues at the entrance a pleasant and swift experience.	• Provide activities at the entrance that entertain people before the event. • Marketing and reading material (fliers) can be distributed at the queue. • Have people selling snacks and beverages in the queues. • Have several lines designated for entry.

Source of event exposure	The segment with the highest percentage of Facebook and website (gaming-related) exposure.	Frequently use Facebook as a social media medium for marketing and communication.	• Use promotions or competitions to get people more involved on Facebook. This could be through fan drawing competitions, quizzes or best concepts for new games. • Give regular updates about the event through Facebook. This could include exhibitors on board, developers who will panel famous cosplayers or celebrities who will make an appearance, or new activities and competitions at the event. • Use Facebook as a method for attendees to give feedback on the event after the event.
		Collaborate with gaming websites to market the event.	• Identify and collaborate with local and/or international gaming websites to promote the event on their WebPages. This could be accompanied by a link to the rAge page or by an info graph with dates, ticket prices and exhibitors to name but a few. Collaboration could also include the marketing of other gaming events, stories or updates on the rAge Expo page.
Devices used for gaming	PC and game consoles are the most used devices for gaming among *Trend seekers, followed* by cell phone/handheld devices.	See Table 5.25	• See Table 5.25 • Seeing that 54% use cell phones for gaming, booths can be assigned with the latest games (including cell phone VR and AR games) to be tested on cell phones and handheld devices. Information on this side of the video gaming industry could also provide an informative perspective of its growth and its future.
Regular types of video-game purchases made	Most *Trend seekers* make digital full-game purchases followed by physical disc and DLC purchases.	See Table 5.25	See Table 5.25 • Posters, banners or even information staff at booths can remind people of games and DLC that are on sale/discount at various online stores. This includes discounts one could get if you are a member of a gaming network (PlayStation Plus member or Xbox Gold member).
Genres of games played	*Trend seekers* mostly prefer the genres: action, shooter, adventure, survival horror, fighting and strategy/tactics.	Promote these genres at the rAge Expo.	• Encourage retailers to provide discount on these games adhering to these types of genres. • Use content in these types of genres as marketing material to attract *Trend Seekers* to the event. • Provide a demo booth for testing games in these types of genre.
Type of gamer	Most *Trend seekers* see themselves as Hard-core gamers and also as being creative.	Provide a diverse variety of gaming content and available at the event for *Trend seekers* to explore and interact with.	• Present opportunities where *Trend seekers* can present their creative output related to gaming at the event. This could be a booth or areas designated to fan contribution. Items can even be sold or used for competition purposes. • Have gaming developers, artists, musicians and designers talk about their creative contributions. This can provide informative teaching moments to people wishing to do the same content one day. • Have many competitive gaming teams there to talk about their training and experiences. • Give information on upcoming tournaments and gaming events. • Stream of show life video gaming tournaments with commentators if possible. • Include various gaming tournaments for hard-core gamers to compete in.

Source: Researcher's own compilation

- **Recommendations and strategies: *Casual attendees***

The second largest segment of attendees to the rAge Expo is *Casual attendees.* Most *Casual attendees* are male (88%), English (69%) and single (74%), with 87% of *Casual attendees* living in the Gauteng province of which 67% are local to the Johannesburg area. *Casual attendees* are the second highest average annual income group (R174 158.82) but spend on average the least amount of money at the rAge Expo (R1 302.38 per person). Table 5.28 provides a summary of the key findings with accompanying recommendations and strategies to attract and retain *Casual attendees* for future events.

Table 5.28: Recommendations and strategies aimed at *Casual attendees*

Key aspects	Observation	Recommendation	Practical marketing/management strategies
Motives for attending the rAge Expo	Similar motives to *Trend seekers* for attending rAge but disagree on *gaming promotions and competitions* as a motive for attending.	Focus on deliverables that are the main motive for *Casual attendees for attending* (*social gaming developments* and *following gaming developments*).	• Avoid marketing at the event that focuses too strongly on gaming competitions and tournaments. • Provide a variety of stalls and booths that deal with the testing of games and on updating people on the latest in gaming gadgets and gaming development. • Promote the event as a social/community event and accommodate activities that allow for these types of interactions. This could include communal lounges, larger seating areas and game demos that allow for social play.
Times previously attended the rAge Expo	The segment that has previously attended the rAge Expo the most number of times (3.7 times).	As loyal attendees to the event it is important to keep *Casual attendees* satisfied, translating into positive word-of-mouth.	• Ensure satisfaction by focusing on activities related to the primary motives of their attendance (see the column above). Satisfying experiences can translate into positive feedback and word-of-mouth. • Keep the event affordable since this is generally the weakest-rated aspect of the event and one also identified by *Casual gamers*. • Have a variety of merchandise, PC hardware and video-game disc retailers.
Average group size	The segment that attends in the smallest average group size (4.2)	Accommodate smaller groups but also encourage larger group participation.	• Provide social activities for two-on-two gameplay. • Encourage promotions among retailers for 'buy-one-get-one-free' deals. This could get *Casual attendees* to pay for more than one person. • Include deals on group tickets; this could be for either 4 or 5 people encouraging people to travel/attend in larger groups. • Provide a shuttle service to various areas in the Johannesburg area, making it less expensive for casual attendees to spend money on parking and transportation. People travelling in groups can be provided with a discount.
Spending at the event	*Casual attendees* spend most of their money on merchandise, PC hardware and video-game disc sales at the rAge Expo.	Accommodate a variety of merchandise, PC hardware and video-game retailers at the event.	• Approach a variety of merchandise retailers to exhibit at the event. • Encourage exhibitors to provide discount on merchandise, PC hardware and video games. This could be done by renting Expo space at a cheaper price to those providing discount. • Incorporate a booklet or flier with discount coupons on these items at specific retailers which can be handed out at the entrance where many *Casual attendees* make their day ticket purchases.
	To lowest spenders at the event.	Keep the event affordable	• Keep ticket prices low. Since most *Casual attendees* buy their tickets at the entrance, a special price could be given on day tickets to the first 100 attendees each day of the event.

Annual spending on games/soft-ware	The segment that spends the most on video games a year	Promote a healthy sale and variety of games to be purchased at the event.	• Keeping the event affordable could get *Casual attendees* to focus more on purchasing games at event retailers. • Have a variety of retailers selling games or have retailers that sell a variety of games. This includes retailers to have sufficiently stocked stalls.
Evaluation of expo-related aspects	*Affordability* is the lowest rated aspect for the event amongst Casual attendees, followed by *quality and variety of content*	See Table 5.26	See Table 5.26
		Accommodate a variety of merchandise, PC hardware and video-game retailers at the event.	• Have trusted and popular retailers selling their wares at the event. This could ensure a high level of quality items. • Allocate a large space for retailers that sells a diverse array of gaming products. This will help such retailers not to limit the items they have on sale.
Home language	The segment with the highest percentage English speaking attendees	Focus on English as primary method of communication and marketing.	• Although staff should be bilingual, ensure they are fluent in English. This would make it easier to communicate information to *Casual attendees.* • Make primarily use of English when marketing the event on posters, banners, social media and the event itself. • Make use of easy understandable English on signs and indications at the event but also outside the event for people on their way to the event or the entrance.
Age and education.	The second youngest segment with many Casual attendees being scholars and students.	See Table 5.25	See Table 5.25
Type of tickets purchased	The segment with the highest percentage of day ticket purchasers (72%) and ticket purchases made at the entrance (53%)	Make the event as accessible as possible.	• Have sufficient staff dealing with ticket sales and queue control • Have clear and sufficient signage indicating ticket sales, the entrance, parking areas and roads leading to the event. • Different types of ticket sales could include different types of 'freebies' or coupons at the entrance. This could encourage *Casual attendees* who are mostly local to the Johannesburg area to make weekend ticket sales instead if the 'freebies'/rewards are better. • Since the majority of people are day-ticket purchasers, have more than one allocated for these attendees at the entrance.
Source of event exposure	Word-of-mouth was the primary source of exposure for *Casual attendees*	Retain and improve the aspects that motivate Casual attendees attend.	• Provide an affordable event with quality and variety of content. • Provide various and accessible opportunities for testing games and being educated on the latest gaming developments. • Accommodate activities and areas for social opportunities. This could also mean keeping the loudness factor (music or announcements) of many exhibitors tolerable.

Current devices used for gaming.	More than any other segment *Casual attendees* use game consoles for playing games on.	Accommodate game console producers and publisher at the event.	• Approach big console-producing companies such as Nintendo, Sony and Microsoft to have stalls and testing booths at the event. • Have first-party games that are console-exclusive games at the testing booth. This includes trailers and demos of upcoming games. • Have a representative or game developer talk about games or game line-ups for each console. • Have a variety of stalls that sell console games or have stalls that sell a variety of console games. • Encourage retailers to offer console game discounts, especially on single-player action adventure game.
Preferred type of gaming	Casual attendees mostly prefer single player and online multiplayer games.	See Table 5.25 on single player games	See Table 5.25
		See Table 5.26 on online multiplayer game	See Table 5.26
Genre of games played	More than any other segment (89%), *Casual attendees* agreed for playing adventure games.	Promote adventure games at the rAge Expo.	• Encourage retailers to provide discount on adventure games, but also shooter games. • Focus on adventure and action games in marketing material for rAge. • Get developers or publishers to talk about and demo their upcoming or latest adventure and action games. • Hire cosplayers to dress as adventure or action genre game characters and to take photos with attendees. • Decorate the venue with adventure themed props. This would also provide a sense of escapism for all segments.
Hours spent playing games	*Casual attendees* spend the least amount of hours playing video games and mostly see themselves as casual gamers.	Accommodate Casual attendee's approach towards playing games	• Have demos that can be played in short bursts. • Have many arcade type games on show. Arcade style games are easy to pick up and play. • Refer back to 'Descriptive summary for the market segments: Motives for playing video games' under the heading 'Lessons learned from *Casual gamers*' for recommendations on *Casual gamers*.

Source: Researcher's own compilation

Section B: Assessing video gaming events from a supply side

The following section examines the supply-side sampling section of this study that involved qualitative data collection in the form of telephone interviews with video gaming event organisers in South Africa. One of the most important functions of ensuring the success of an event is the ability of event managers to assess the event (Saayman, 2009:214). Unfortunately, this is a process that is often neglected (Manners, 2014:61). However, by implementing good evaluation and control measures, managers or organisers can determine the success of an event as well as its shortcomings (Saayman, Marais & Krugell, 2010:97). To achieve event success that results in memorable attendee experiences, it is important that events are evaluated based on the critical success factors from both a visitor and organiser's point of view (Singh, 2009:243). According to Bowdin, Allen, Harris, McDonnell and O'Toole (2012:240) it is important to understand the needs of attendees to the event and to be attentive to such needs. The previous section of this chapter covered the visitors' perspectives on the rAge Expo - video gaming event, and the largest of its kind in South Africa, that covers a diversity of gaming-related activities and encompasses a variety of different types of gamers/attendees. As such, the rAge Expo served as a good case study to cover the numerous facets presented in other similar events in South Africa.

The purpose of this section is to determine the critical success factors of video gaming events from an organiser's perspective. According to Slabbert and Saayman (2003:8), critical success factors are those that affect the ability of an organisation or event to prosper in the marketplace, including specific strategic elements, competitive capabilities, resources, competencies and business outcomes and functions. No event, including video gaming events, can function in isolation; therefore, it is important to understand the structure in which these events function (Saayman, 2004:150). This structure is determined by the various reasons of event organisers to host events (Saayman, 2004:152). Additionally, this structure should include the event's ability to maintain/grow its audience for sponsors to invest and to keep focussed on the goals of the event itself and of the organisation such as attaining economic and social benefits (Schaaf, 1995:46; Tassiopoulos, 2010:68).

The first part of the next section examines the methodology used for data collection followed by the results obtained from the collected data.

5B.2 Method of research

To understand the reasons and key success factors for hosting video gaming events, a qualitative research approach by means of telephone interviews was applied to obtain the relevant information from the participants. The participants included eight video gaming event/gaming-related event organisers. The information provided by these organisers served as the supply-side perspective of video gaming events. Qualitative research is concerned with understanding processes and social/cultural contexts that underline various behavioural patterns (Niewenhuis, 2008b:51). The process of doing qualitative research involves collecting data in a form of written or spoken language and analysing said data by identifying and categorising themes based on the research method (Durrheim, 2006:47). Qualitative research also allows one to study selected issues in-depth as well as to 'study phenomena as they unfold in real-world situations' (Durrheim, 2006:47). As a method of in-depth study, it differs from information provided in scope and breadth as found in quantitative research (Niewenhuis, 2008b:51).

5B.2.1 Research design

The research followed a qualitative case-study method. A case-study method enables the researcher to closely examine the data within a specific context and allows the exploration and understanding of complex issues (Zainal, 2007:1). According to Bromley (1990:302), a case study is a 'systematic inquiry into an event or a set of related events which aim to describe and explain the phenomenon of interest'. Similarly, Yin (1984:23) defines case research 'as an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used.' In qualitative research, the experience, expected views and/or personal writings of the sources of evidence or participants are more significant than their numbers (Cresswell, 2009:185). Case studies of individuals thus require but a few in-depth interviews with key informants for collecting data (Zucker, 2001:2). The important features of a case study are that it strives towards a holistic understanding of how participants (interviewees) relate to one another, interact in particular situations and make meaning of the specific phenomenon under study (Niewenhuis, 2008a:75). A case-study approach therefore ensures that the researcher gains a better understanding of the meaning attached to those within the system. In this case, organisers involved in organising video gaming events/video gaming-related events in South Africa was approached to participate in the current study.

5B.2.2 Data collection

Data for the research was collected by means of structured interviews. Structured interviews for the collection of qualitative research are used in case studies to ensure a structure is followed where questions are detailed and developed in advance (Niewenhuis, 2008a:75). The structure of the interviews included both open-ended and closed-ended questions to ascertain socio-demographic information, event profiling information, information on the critical success factors for hosting the events, as well as information on the perceived status of the video gaming industry in South Africa. Firstly, the socio-demographic questions were designed to profile organisers by their level of education, career ladders and job title/description (see Manners, 2014:122). Secondly, the posed event-profiling questions determined the type of event hosted, year of establishment, dates and duration, target market and their changing trends, average attendance numbers, event objectives, key role-players, event strengths, weaknesses, opportunities and threats (SWOT) analysis, and event contributions. Thirdly, identifying key factors for creating memorable experiences and ensuring successful events is an important part of supply research (see De Witt, 2006; Kaplanidou, Kerwin & Karadakis, 2013; Kruger, 2006, Lade & Jackson, 2004; Manners, Saayman & Kruger, 2015). Interview questions related to the target market and critical success factors of the event can be traced back to the type of attendees of the rAge Expo and their motives for attending, providing valuable information for comparing both supply and demand-side perspectives. Questions related to the perceived status of South Africa's video gaming industry were designed to analyse South Africa's video gaming industry from an organiser's perspective and how video gaming events can facilitate tourism.

5B.2.3 Participants

Purposive sampling and the main form of qualitative sampling was done to identify and select relevant and credible participants who answer to the criterion for presenting supply-side perspectives. According to Scholtz (2018:9), by doing purposive sampling, members of a sample are chosen purposefully in that they represent 'a phenomenon, group, incident, location or type in relation to a key criterion that can provide rich and credible information'. The organisers of video gaming events were identified through various online sources (see MWEB Gamezone, 2018:internet; SA Gamer, 2018:internet; Zombiegamer, 2018:internet), where after they were contacted by means of e-mail, telephone and/or the social media site, Facebook, to participate in this study. The purpose and perceived outcome of the study were explained to organisers, including the perceived length of the interview and questions to be expected. The participants were informed that their participation in the interviews would be voluntary (and date and time at their convenience) and that their names and organisations will be kept anonymous in the results. Eight participants who shared a common feature in

that they were involved in organising video gaming events/video gaming-related events agreed to participate. These participants were interviewed telephonically during the months of March and April 2018. It is acknowledged by Guest, Bunce and Johnson (2005:59) that meta-themes through interviews could be identified as early as in the first six interviews. Furthermore, the organisers who participated in the interviews represent some of the biggest and/or most popular video gaming events in the country of which there are but a handful. Their opinions are therefore valuable to consider. The eight participants and their affiliated video gaming events can be seen profiled in Table 5.29.

Table 5.29: Participants and affiliated video gaming event background

Profile aspects	Background of organisers and affiliated video gaming event							
	Participant A	**Participant B**	**Participant C**	**Participant D**	**Participant E**	**Participant F**	**Participant G**	**Participant H**
Gender	Male	Male	Male	Male	Male	Male	Male	Male
Highest qualification	N2 Refrigeration N3 Logistics N2 Electronics	BA degree in Psychology and Communications	Chartered accountant (CA)	Electrical engineering	Matric	Matric (enrolled for a Bachelor's degree)	Matric	Matric
Started career as	Worked with refrigeration	Worked at South African Airways	Working as a chartered accountant and started a comic shop	Worked in the Information Technology (IT) industry	An internship in graphic design and web development	A student who started as a student staff member for the gaming event	Worked at a wooden chair factory and then at Gospel Direct	Started own business selling power tools and then got involved in a magazine reviewing games and hardware
Years working in the video gaming industry	-	20-25 years in the exhibition industry	25 years in comics and video gaming	Started in the IT industry in 1992	4/5 years in a company that organises events	-	-	15 years involved with the event
Job title/ description	CEO	Owner	CEO/Head organiser	Event organiser	CEO/Founder	Chairperson	Administrator	Business Development Manager
Type of event organised	LAN event	Video gaming event (LAN, cosplay, table-top games, console games, competitions)	Comic and video gaming event	LAN event	Forum for video gaming industry developers, leaders and decision-makers in South Africa	Gaming and 'nerd' convention	LAN and video gaming expo	Video gaming exhibition (games, cosplay, 'geek' culture and technology)
Year event was established	Started the event in 2011 and registered in 2014	2015	1992	2015	2018	2013	2008 and then a name change in 2010/2011	2002
Host city/town of event	Cape Town	Cape Town	Kempton Park	Kempton Park	Rosebank, Johannesburg	Cape Town	Pretoria North	Randburg, Johannesburg
Reasons for the host venue	• Affordable venue	• Good internet connection	• The second venue was too big	• Cheap/cost effective venue	• Partnership deal with venue owners	• Affordable venue	• Spacious venue • Cheap/ affordable venue	• Good location and sizable venue

	• The famous venue for one of the biggest LAN events in Cape Town	• Good iconic venue • 24-hour service if needed	• The first venue has a good fan base but was too small • The future venue has pricing flexibility	• Good location for socialising	• Member at the venue	•Discount to host there	• Lacks the power to support a large number of gamers	
Time of year event is hosted	Six events per year - February, April, June, July, September, December)	July	July	Monthly (dates identified for 2018 include February, March, May, June, July, August)	March	January	July	October
Duration of event	3 days	3 days	3 days	3 days	1 day	2 days	4 days	3 days
Target market	18 years and older	All people interested in gaming and electronics	Anyone interested in comics and gaming	Gamers aged 18 to 50 (open to all)	Heads of industry and developers of industry	All types of gamers (people from the immediate area)	Open to all ages enthusiastic about gaming	All ages interested in video games
Attendance numbers	Between 60 and 200 attendees	Between 16 000 and 20 000 attendees	5 500 attendees	Between 40 and-50 people	146 attendees	1 400 attendees	4 500 attendees	35 000+ attendees
Event objectives	• To provide gamers with gaming tournaments	• For financial reasons • To entertain a diversity of people • To provide an interactive and interconnected event	• To provide a fun event • To provide a gaming event for the fans even if it means losing money	• To provide a socialising event where one can play games • To provide gaming competitions with prizes	• To provide a forum for industry heads to meet and collaborate	•To mimic the rAge Expo but for Cape Town and expand on that idea	• A platform for PC and tech savvies to come together • To have exhibitors promote to gamers • To promote the LAN culture	• To provide opportunities for retailers to retail their gaming goods • To provide a platform for technology developers to exhibit their latest gaming technologies and game developers to showcase their games • To provide gamers/ visitors with an enjoyable experience

It is evident from Table 5.29 that most of the events take place over a 3-day period (weekend) with many occurring in July. This could potentially be a competitive problem for the events since they are also situated in major South African cities.

Compared to the age of attendees of rAge (as revealed in the demand-side results), many of the events cater to a similar age demographic. In agreement with the most popular reasons for attendees for attending rAge (c.f. 5A.4.2.2), many of the above events focus on socialising, interaction and promoting a gaming culture. Alternatively, some events are mainly focused on competitions and prizes which are rated as the lowest motivational factors amongst *Enthusiast* and *Casual attendees* for attending the rAge Expo.

Table 5.30 provides a summary of role-players identified by the participants and the importance of their role to the event.

Table 5.30: Event role-players as identified by the participants

Participants	Event role-players	Role-player function
Participant A	Micro-Star International (MSI) (Manufacturer of video gaming hardware)	• Sponsors gaming accessories (headsets)
	Gadget Frog Merch store (not specified)	• Aids with network issues, entertainment value and competitions at the event
	Robohobo	• Helps with server connections, twitching and live streaming tournaments
	Youtube sensations	• Streams from the event
	Popular gaming teams	• Attends and participates in the event
Participant B	Computer hardware retailers/manufactures and publishers	• Exhibits at the event
	Sony PlayStation	• Promotes the console and console games • Provides consoles for game demonstrations • Provides gamers with tournaments to win prizes (prize money)
	Big brand retailing companies (Hewlett Packard and Lenovo)	• Retails at the event
	Cosplay	• Cosplay at the event
	Exhibitors	• Provides visitors with things to see and do
	Partnered organisers	• External organisers who help organise games, table-top gaming tournaments and Cosplay at the event
	KFM	• Headline sponsor at the event

Participant C	Stallholders, crafters and artists	• Do direct dealing with attendees at the event • Pay for space at the event • Aids in marketing/adverting the event
	Board game distribution companies (Solar Pop and Games Workshop)	• Promotes board games • Provides prizes at the event
	Sponsors (AWF)	• Sponsors prizes, competitions and stalls.
	International cosplay competitions (World Cost Player's Summit)	• A collaboration with cosplay competition to send cosplayers to compete.
	Canon	• Sponsored equipment and 'selfie' ladies for the event
	Nickelodeon	• Acts as a sponsor for the event
	Corporate groups	• Acts as sponsors for the event
Participant D	Copper Fiber Africa and the participant's own company	• Ensures that the correct infrastructure is in place for hosting the event (electric connections and connectivity)
	Internal admin staff who does IT tasks for the venue	• This enables the organisers to rent the venue at a very good price
Participant E	MWEB and Metrostate	• Key speaker partner at the event
	Metrostate (Metropolitan State University)	• Key in promoting the event
	MESH	• Host partner to the event
	Monster energy drink	• Sponsored refreshments
	eSport streamers	• Speakers of eSports at the event
	Partners	• Main speakers and showcasing of the event • Get partners together under one roof to create collaboration opportunities
	EasyEquities	• Sponsor at the event and provide a showcase on game development and design can find work
Participant F	Local store (Readers' Den)	• Helps with the distribution of the tickets • Sponsors prizes • Aid in marketing the event
	Zombiegamer Cape Town	• Deals with gaming-related aspects of the event
	University of Cape Town	• Provides an affordable venue for the vent
	Cape Town Cosplay	• Looks after the cosplay division of the event • Provide cosplayers with information on the event
Participant G	Internet providers	• Providers of fast and reliant internet (SFIBER)
	Onsite technicians	• Service and fix any internet/connectivity-related problems

	Exhibitors	• Computer shops that retail products at the event • Shops that retail beauty apparels and jewellery for girls
	Food vendors	• Sells food and theme orientated candies at the event (Minecraft block chocolate)
	Nearby fast-food vendors	• McDonalds and KFC is nearby which enables attendees to buy food there and take to the event
	Sponsors (MSI and Dragon)	• Help sponsor prizes or supplies for the event
	Gaming Clans	• Helps get sponsors for the event
	Ballistix Masters	• Sponsors for online LAN tournament/s to be assisted at the event
	Advertisers	• Using small local magazines to advertise the event. • Using local gaming websites to advertise the event.
Participant H	Suppliers	• Bringing content to the event
	Retailers	• Availability of new tech for visitors
	Competent and passionate staff	• The backbone of the event and activities to run fluidly
	Gaming magazines	• The use of gaming magazines to receive feedback from visitors to the event
	Marketing	• Using street-poles, posters, billboards, Facebook, Twitter, Instagram, radio and magazines to advertise the event

Looking at Table 5.30 it can be seen that sponsors are one of the biggest, if not the most important role-players to video gaming events and can aid them in numerous ways ranging from marketing efforts, sponsoring of prizes and competitions, sponsoring equipment, and/or providing network-related assistance. On the topic of network connectivity, most of the events rely on fast and stable connectivity for gaming and LAN-related activities. This is of particular importance to LAN attendees or *Socialisers* (c.f. Table 5.23). Streaming the event is also considered an important role-player to create event awareness and as such, it is important to encourage or attract vocal streamers. Their presence can have a strong word-of-mouth influence in marketing the event, and one that is highly effective among gamers. When it comes to larger video gaming events (exceeding 1 000 attendees), retailers and exhibitors start to add important entertainment and sales value to the event with retail stalls and exhibits. Lastly, it is evident that partnerships or collaboration with other divisions of organisers (cosplay groups), suppliers (network providers) or entertainment producers (Sony PlayStation) can provide valuable support in organising the event.

5B.2.4 Data analysis

The data collected by means of recorded telephone interviews were transcribed into text and presented in a narrative form. The data was analysed using Cresswell's (2009:185) six steps in data analysis and interpretation. The various stages included:

- **Step 1: Organise and prepare the data for analysis.**

In this step, the data were organised and prepared for analysis which involved the transcription of the eight recorded interviews and cataloguing the participants.

- **Step 2: Read through all of the data**

By reading through all the data several times a general sense of the information was obtained. This enabled the researcher to reflect on the overall meaning of content, impression, the tone of ideas and use of information, particularly with regard to the organising aspects reflected in the results.

- **Step 3: Start a detailed analysis using a coding process**

The data concerning the organising aspects (critical success factors), event objectives and event contributions were coded in order to identify important management aspects. In other words, organising and sorting data by labelling and dividing it into meaningful ways/topics. Thereafter, the recoding process was followed-up by an outsider to ensure trustworthiness. The results were then compared with a view to gain an overall perspective.

- **Step 4: Use the coding process to generate a description of categories or themes for analysis**

The identified coded data were divided into categories whereby similar coded data were grouped together and described. Thereafter, themes were allocated for each category. These themes appeared as the major findings of the qualitative results and were then stated under separate headings in the finding section of this study.

- **Step 5: Advance how the description and themes will be represented in the qualitative narrative**

This step was achieved by carrying on a discussion of the chronology of the importance of the various themes. This included a detailed discussion on each theme and the information identified by each participant.

- **Step 6: Interpret or make meaning of data**

Lastly, a personal interpretation and understanding of the results was formulated in the form of 'lessons learned'. The results were also compared with previous research and literature based on the supply side when organising events.

5B.2.5 Issues of trustworthiness

In the case of qualitative research, trustworthiness is determined by 'methodological soundness and adequacy' (Holloway & Wheeler, 2002:254). According to Guba (1981:84-88), trustworthiness consists of the following four components: credibility; transferability; dependability; and confirmability. Credibility was achieved through internal validity to ensure that the study measured what it was intended to measure. This included adopting research methods that were well established. Transferability was achieved by using purposive sampling whereby specific information was maximised in relation to the context. Comparing the study findings with other situations was also done to achieve this purpose. In addition, the recoding process was peer examined. Dependability was achieved through the identification and selection of appropriate and reliable sources for providing context-appropriate information. Conformability was achieved through objectivity where the results are reflective of the informant's ideas and experiences rather than the characteristics and preferences of the researcher.

5B.2.6 Ethical consideration

Ethical approval was obtained from the Ethics Committee of North-West University (Potchefstroom Campus: EMS24/05/16-02/01). *Research ethics* refers to the application of moral standards in planning, conducting and reporting of the results (McNabb, 2004:55). The main purpose of research ethics lies in protecting the welfare of the research participants (Wassenaar, 2006:33). This is particularly true for and important in studies that involve social research (Mollet, 2011:2). Therefore, ethical steps/obligations were taken into account by the researcher in respecting the rights, needs, values and desires of the participants (Creswell, 1994:165). This included maintaining a degree of anonymity where the identity of participants and the organising organisation would be protected. Additionally, consent was obtained from all eight participants before the interviews commenced. All interviews were done voluntarily with the permission of the participants and on a time and date that suited their needs. Participants were informed in advance about the purpose of this study and the type of questions they could expect.

5B.3 Results from the qualitative research (supply side): Identified themes

Several themes were identified for this research and were differentiated in terms of various categories and subcategories. Appropriate verbatim quotations from the transcribed interviews were provided for validation. The quotations serve to strengthen the relevance of the themes and their importance to this study as identified from a supply-side perspective. Names of participant organisers and their related events were kept out of quotations for the purpose of anonymity. Brackets were placed in their stead to identify that a venue, the event or an organiser's name was mentioned. Additionally, not all participants had good command of the English language and are evident in some of the forthcoming quotations. The themes identified are consequently discussed under the categories: *factors for selecting a venue; main objectives for organising video gaming events*; *how to deal with changing market trends*; *critical success factors for hosting video gaming events*; and *the state of video gaming events in South Africa*.

5B.3.1 Factors for selecting a venue

Five themes were identified for selecting a venue. The themes identified for this category stem from questions related to the venue, such as reasons for selecting the venue. Each theme is ranked by the number of participants who mentioned items relevant to said themes, including the *location*, *size/space*, *price and affordability*, *onsite services* and *internet connectivity*. The themes are discussed below.

- **Theme 1: Location**

Based on the interviews, the location of a venue plays an important role when hosting video gaming events. A venue can be selected based on its popularity as stated by Participant B: 'So, that, that's, it's an iconic venue'. The price and sociability is another aspect that can influence the location of a venue as identified by Participant D: '...we do get the hall for a very good price so that is one of the main reasons why we choose the event or the event location and I mean they have a nice area where we can socialise.' According to Participant B, a more optimal venue would be one that is close to everybody as identified by the statement: 'I'd prefer to take it slightly out into the suburbs that's close for everybody, but there aren't any.' Another aspect to consider is the size of the venue and number of attendees it can host, such is the reason why Participant C wish to move to a new venue in the statement: '…this first year we're not in the prime location because they had already pre booked stuff before we even tried to book, so we're outside in the [mentions the name of the venue where the event is held], so it's going to be a bit cramped this year, going back...'. The size requirement is also the reason why Participant H chose his location as stated: 'We run

[mentions the name of the event] due to the location of the venue and the size required for this massive event.'

- **Theme 2: Size/space**

As identified in the theme above by Participants C and H's statements, the size or space available, together with the location, goes hand in hand when deciding on a venue. These aspects can determine the number of people one can host and the type of visitors one can attract. For these reasons, Participant C booked his next venue at a 'prime location' where he will have adequate space as quoted: ' We've already booked that, and we'll have all the space that we really need.' Venue space was also an issue for Participant E: 'There was a bit of obvious an issue with the PlayStation guys had to have 2 set-ups, but the rooming is a bit awkward in the [Mentions the name of the venue]. But that is just how the structure is there.' Being the first time this event was hosted, Participant E identified that if he moved he will seek more space for the next event as quoted: 'So, obviously, if we move it to a different, if we did then probably again, we're obviously put it in another room...'. According to Participant G, the venue they chose in Pretoria North is the only venue that has enough space for their event, as quoted: '...it's the only venue around that has a lot of um, space. It's big, huge because it's like a sports centre; it has ah, two stories as well.' Going too big on a venue can also present problems and is a reason why video gaming events such as Organised Chaos potentially failed according to Participant A's statement: 'Everyone knows that they got to that, that epic level where they needed to move and then they moved straight into the Velodrome. Um, and that place was huge, that place they got up to 1400 people ...and the end of the day I think that was what killed them, and they couldn't find an alternative venue for a decent price.' Therefore, a fine balance should be struck between size/space and attendee numbers when choosing a venue for video gaming events.

- **Theme 3: Price and affordability**

Affordability is one of the key issues identified by visitors to the rAge Expo. Having an expensive venue can increase an event's budget and sometimes lead to higher pricing standards. To avoid this, many organisers opted for venues that were affordably priced or got it at a discounted rate. This is evident in Participant G's statement: 'Um, ja, so that's actually why we sit at this place because it's much, much cheaper than all the others.' A discounted venue is also the reason why Participant F chose his venue as evident in his statement: 'It is more a funding reason because we are part of this [mentions the institution where the event is held], they give us more of a discount if we use their facilities.' Having a cheaper venue also plays to the even's strength, as it allows the event to be more affordable for the vendors as well as the public as identified by Participant F's statement: '... in addition

to the aspect of money and like I said, for us being cheaper for both vendors and the general public.' An affiliation or some sort of partnership arrangement with the venue organisation also benefits Participant D and Participant E. For instance, Participant D's company does IT-related tasks for the venue organisation and therefore receives a discount on the venue, as evident from the quote: 'Now one of the admin guys does all the IT stuff so we do get the hall for a very good price so that is one of the main reasons why we choose the event or the event location...The venue is basically to help us to get people together and I think if we didn't get that venue at such a good price then I don't think we would have it on such a regular basis'. Participant E on the other hand is a member of the venue organisation. This membership provides him with a discounted venue as identified by the statement: 'I am a member there. So members get a better package deal. So, all members get discounted rates for hosting at their venue, which is pretty sweet.' In addition, although Participant E got the venue at a discount rate, there was feedback that the pricing of the event was a bit steep as identified by the quote: 'There was only one comment about probably only the pricing but that's all about exclusivity.' In that response Participant E commented: 'So, next year if we to a little bigger venue, we will reduce the price. So, the pricing is the main issue, but that can always be rearranged next year, according to which venue which is...' To conclude this theme, pricing seems to be an important deciding factor for selecting a venue and that partnership arrangements with venue organisations can benefit organisers with discounted rates.

- **Theme 4: Onsite services**

Onsite services are valuable tools if something goes wrong at the venue and needs immediate fixing. This is particularly true for events that rely on technological and networking infrastructure such as video gaming events. The importance of this service at the venue was identified by Participant B in the quote: 'So, convention centre comes, ah, everything we need. From the data to electrics, 24 services should we need it, there is always somebody on standby', as well as Participant G 'But, um, ja the speed is fast and there are onsite technicians that always fix the speed and the [unclear] but sometimes [unclear] and so on.' Having a working and stable infrastructure was also identified as important by Participant D: 'Okay, so number one I would say is that everything is organised correctly, [unclear], the infrastructure is very important, the stability of the infrastructure is very important on both the networking and the power side.' This quote by Participant D also feeds into the network connectivity factor identified in the next theme.

- **Theme 5: Internet connectivity**

Having a venue, or supplier, that provides a stable internet infrastructure can greatly benefit video gaming events that make use of LAN and online gaming competitions and tournaments. This was one of the key aspects identified by Participant B for venue selection in his quote: 'One, because you need, ah, clean data if you're going to do a successful gaming tournament. ' and 'So, it's a fantastic venue and it comes with all the, the, okay, it comes at a price obviously, but, ah, so when you need to do data, it's clean data.' Although participant B explicitly identified internet connectivity to be an important aspect for choosing a venue, internet connectivity was considered a critical success factor by several organisers. This theme will be explored in more detail under the heading *Critical success factors.*

5B.3.2 Main objectives for organising video gaming events

Five themes were identified as main reasons for organising video gaming events. The themes identified for this category stem from questions related to the main objectives of the event and why organisers host these events. The number of responses ranks the themes as *socialisation and interactivity, fun and enjoyment*, *competitions and prizes*, *buyer-supplier (seller) interaction,* and *passive financial endeavour.* The themes are discussed as follows:

- **Theme 1: Socialisation and interactivity**

Social gaming development was identified by visitors to the rAge Expo as the most important reason for attending the event, which included spending time with relatives and friends and to socialise and meet people with similar interests (c.f. 5A.4.2.2). As the main objective for organising video gaming events, socialisation and interactivity fits favourably in agreement to why visitors attend video gaming events. Having an interactive and sociable event can be seen as stated by the following participants:

> Participant B: 'This is an interactive show, it's like people queue up, a third of our ticket sales are weekend passes. The diversity of the visitor audience...'
>
> Participant C: 'So our event is partially about the gaming and everything but then also it is partially about the interaction between friends and people and more on the social side as well.' and 'Socialising hey, socialising and playing games.'
>
> Participant F: 'I like to think it does, because I mean we've always been a social society, that's like the big thing about us more than anything...'

Additionally, a LAN event enforces sociable play among people and is one activity many video gaming events include. Participant G particularly identifies the need to keep the LAN culture alive and sees his event as a way to promote it. This is evident from the statement:

'And the other main reason is, um, the LAN culture is a little bit dying out. So, we want to promote the LAN culture where it you know, people come together and play games with each other.' Alternatively, although Participant E's event does not include LAN gaming, his focus for the event is nonetheless aimed at interaction and collaboration between heads of industry. This is evident in the quotes:

> ...main thing is also to get people who have never met each other, to collaborate together…
>
> We wanted people to be able to come to a place, meet heads of State almost, kind of, and make some sort of big decision of where they want to do business or those kind of like, that is the kind of avenue that we were focussing on.

Consequently, it is undeniably evident that interactivity and sociability play a key role in hosting successful events leading to visitor satisfaction.

- **Theme 2: Fun and enjoyment**

'To have fun' is an item found in the factor *Gaming promotions and competitions* (mean of 3.08) as a motive for attending the rAge Expo, as a single standing item, it has a mean value of 4.6. This indicates that to have fun is a highly important reason for attendance. Seeking to fulfil this objective is considered the main objective by several organisers (participants). This is evident from the following statements:

> Participant C: 'To give the attendees 3 days of fun.' and '...we're basically doing it for the fans who mostly are our friends.'
>
> Participant E: 'So just some sort of initiative for people not to just come and play games. It is fun, but I mean, that is to be some of cause for it...'
>
> Participant F: '...having gamers and the people who are like gamers, who run gaming events, having them all in the same area, it helps people, it actually helps people to, it just brings the community together into one place to have fun...'
>
> Participant G: 'And, um, form like that whole, um, playful nice atmosphere...' and 'So, there mustn't be too many rules, but make it fun and exciting an entertaining, that's the main thing'
>
> Participant A: 'Everyone's enjoying it and came, coming to me and saying, you've got to do that again. You've got to do that again. So, ja, um, that's, that's what drives me.'

Furthermore, as evident from Participant A's statements, an enjoyable event is what drives him to organise it, while Participant C organises it for their fans and friends. This shows that these organisers value what they do. The same goes for participant B when asked why he

hosts the event, as evident from the responding quotes: 'Ah, but also, so that the passion for the project...' and '...it's an exciting field...'. Therefore, gaming events should be fun and enjoyable and by having passionate organisers behind the wheel can help contribute to enhancing these aspects.

- **Theme 3: Competitions and prizes**

According for attendees of the rAge Expo, *Gaming promotions and competitions* is considered the least important factor (mean of 3.08) for attending the event. This is not to say it is a disagreeable factor but rather an undecided one. With that said, providing competitions and prizes as a main objective for video gaming events might be in somewhat disagreement to visitor reasons for attendance. Nonetheless, Participant A identified hosting tournaments as a main reason for the event, as stated: 'Is to have the tournament take place so that everyone that took part in the tournament would share in the experience...'. Participant A also identified having sponsors/partners that attend to different competitions at the event, as evident in the comment: 'So, I have several people that have my back, that will cover me and say, right I'll sort out that competition while you sort out that competition.' Participant G identified their main focus for the event is on getting prizes for the competitions, as quoted: '...our main focus is just to bring, um, some more value to the event by adding a bigger pool of, um, prizes towards the competitions.' Participant D, however, identified socialising as the main objective but included competitions and prizes as another, as seen in his statement: 'Socialising hey, socialising and playing games. It is a little more structured than that. We do have competitions where we hand out prizes. We have got competitions where we hand out certificates...' Furthermore, Participant C identified organising gaming competitions as part of his role at the event in the statement: 'So all the gaming competitions that happen, I pretty much organise, I don't do it all myself, I have a very lot of pretty useful volunteers that help run the games.' This statement suggests that competitions play a huge role at this event as well. Participant E, on the other hand, sees the implementation of a competition as a potential opportunity for future events at a new venue, as quoted: 'So like the YouTube business or Twitch streamers can actually stream live from there, able to do some sort of competition. So it depends obviously how big the venue is.'

- **Theme 4: Buyer-supplier (seller) interaction**

Gaming purchases was considered the third most important factor among visitors for attending the rAge Expo (mean value of 3.53). This is an agreeable factor for attending the rAge Expo and one which includes video-game hardware purchases, video-game purchases and merchandise purchases. With this in mind, it is fortunate to see that some event organisers consider these types of interactions as primary objectives of the event. Evidence

of this can be seen by Participant G's statement: 'It is to get a platform for, um, local PC and tech savvies, companies to exhibit themselves to the gamers and show, their, their new products and just try and sell their products to the gamers.' Participant H also mentioned that his event '... constantly strive to be a melting pot for visitors of the expo, factories who manufacture the awesome tech we need for playing the latest games on, developers who showcase their amazing new titles and retail companies who sell the goodies.' Additionally, both statements made by Participant H and G also correspond with the factor *Following gaming developments*, the second most important reason for attending the rAge Expo (3.85), which includes testing and demonstrating the latest games and technologies (c.f. Table 5.6).

Furthermore, Participant B suggested that having big video gaming-related retailing companies at the event gives attendees something to look forward to, as quoted: '...plus we got a big retailing company with about 15 different brands from Hewlett-Packard to Lenovo, to the keyboard guys, and all of that. So, that gave the audience something to sort of look, and look forward to.' He also identified that brands such as those mentioned are 'anchor tenants' and that a lack of brands can negatively affect 'word-of-mouth'. Furthermore, Participant B considers it one of his 'jobs' to have buyers and sellers interact at the event. This is evident from his comment: 'So, ja, so for us, we almost, my job is actually to marry buyers and sellers, if we use it simplistically'.

- **Theme 5: Passive financial endeavour**

While many organisers might seek to host events for their financial gain (see Manners *et al*., 2016:151), organisers of video gaming events do not necessarily share the same point of view or objective. This is evident from participant D's claim: 'You know we have always gone into this whole thing with the idea that we are not in it for the money, we in it for the social, like a group of friends get together...' Some organisers even claim to lose money from hosting the event such as Participant C: 'To be honest, it’s not actually a money-making prospect. We've actually lost money.' Other organisers on the other hand do not place an emphasis on money but rather on prizes that their sponsors or exhibitors can offer to their attendees. This is evident from Participant G's quotes: 'Oh, okay, um, with our sponsors they normally give us prizes. Because we don’t really, you know, we don’t really want to go into the money, um, because it becomes a problem.' and 'But normally what we do, we ask the, um, the exhibitors if they, if they want to exhibit then they just give us a prize, or some prizes.' Considering the above quotes, it is evident that video gaming event organisers do not actively pursue hosting events for financial gain. Alternatively, although money is not the primary concern for the above participants, Participant B did, however, identify it to be an

important factor in the quote: 'Ah, okay financially is one obviously.' This, however, does not mean that it is all about the money for Participant B, since he also identified being passionate and excited by the event and the field as seen quoted in the previous theme. Therefore, one might say that financial gain is not necessarily the primary objective of video gaming event organisers (although not excluded) and that sociability and fun receives a stronger emphasis.

5B.3.3 How to deal with changing market trends

Five themes were identified on how to respond to changing market trends for video gaming events. The themes were formulated around questions relating to target markets and how organisers dealt with changes in trends and needs. By a number of responses, the themes are ranked: *stay relevant and current, social media engagement*, *ongoing improvements*, *market responsiveness*, and *international inspiration*. Additionally, the latter two themes have no particular order seeing that each include a similar number of topic-specific responses. The five themes are discussed as follows:

- **Theme 1: Stay relevant and current**

To stay relevant and current is the most important theme on how to deal with changing market trends, sharing a strong connotation with the factor *following gaming developments* as a motive for attending the rAge Expo. The reason being that both the theme and factor concern themselves with new information on games, technology and industry happenings. *Following gaming developments* is also the second most important factor on why people attend the rAge Expo and as such it is important to stay relevant and current when hosting video gaming events. This is evident from Participant B's statement: 'And to try and to stay relevant. I mean, the, I'm 66 years old, so for me to do the first gaming show was a big challenge, because my demographic is out of sync with the gamer...' Additionally, video gaming is a technology-driven industry and one has to stay relevant as identified by Participant H: 'We are a tech-based exhibition and we always need to stay ahead of the trend, showcasing outdated tech will result in a negative visitor experience and thus a drop in attendance and ultimately the end of the show.' Fortunately, there are several ways for video gaming events to stay relevant and current. According to Participant H, one way is through constant communication with developers and another is by obtaining visitor feedback, as evident from the statements:

> We are in constant communication with developers and factories who produce the latest tech.

> We have constant feedback from our visitors via [mentions the name of a magazine the organisers are affiliated with] and are quick to adapt to new trends

Participant C's approach to staying relevant includes getting relevant people at the event and keeping in touch with the community as seen in the quotes:

> ...we try and get more relevant people to come and visit the convention, I don't know quite what else I can say to that one.
>
> I'm sort of fairly in touch with the community, so I sort of understand what they would like.

Lastly, Participant D does this by keeping up to date on the latest games, as identified in the quote: '...we try and keep up to date with the latest games and so we always try and cater for everybody.'

All of the above considered, staying relevant and current when organising video gaming events can greatly influence the livelihood of an event.

- **Theme 2: Social media engagement**

Social media is not only considered a critical success factor, as discussed in Theme 4, but also a valuable tool for identifying changing market needs and trends. Social media platforms such as Facebook, Twitter and Instagram are useful and easily accessible tools for communication and receiving feedback. Several participants identified using social media as a tool for responding to changing market trends. In particular, Participant G uses Facebook to communicate with the community in his statement: 'Ja, the main one is actually Facebook, um, mainly we add photos on Facebook and people communicate to us through Facebook, 'cos it's just easier.' Participant F on the other hand identified using Facebook, Twitter and Instagram, as quoted: 'Our main three are Facebook, Instagram and Twitter, so we can kind of get a very large base of people who only have one of those three.' Furthermore, Participant F uses these media to communicate and receive feedback from the community, as evident from the quote: '...we get the media aspect so that we can kind of speak to them and see what they want, see what they need, what the conversation is.' Concerning Participant C, he too identified using Facebook, Twitter and Instagram for the event but added that the magazine approach also plays a big role, as evident in the quotes:

> We obviously do our online social media. We got, um, quite a nice reach with just, uh obviously [mentions the name of a magazine the organisers are affiliated with] helps a hell of a lot but the same people, you know, who read [mentions the name of a

magazine the organisers are affiliated with] are the same people who visit [mentions the name of the event].

Yeh that's what I'm talking about, the social platforms, so when I say 'social' I'm including Twitter, Facebook, Instagram, um, and then we've got a database as well, um, from, like I said, [mentions the name of a magazine the organisers are affiliated with] helps a hell of a lot.

Communication through a magazine can be effective (30% of rAge attendees were exposed to the event through magazines) though expensive, making social media platforms a more affordable if not free option for organisers on a budget to communicate with the community.

- **Theme 3: Ongoing improvements**

Events do not always go as planned and mistakes do arise. According to several participants, one should learn from these mistakes and correct them the next time around. One of these mistakes might involve not understanding market needs. According to Participant H: '...we need to understand what people want and what they don't like from the last time and what they want for the next time, so ja it's important for us to understand that.' Participant H similarly suggested that one should listen to the patrons and adapt to mistakes in the statement: There will always be mistakes, don't forget about them, adapt to make sure it doesn't happen again and listen to your patrons.' In addition to learning from mistakes, Participant H also stated that one should strive to surpass previous accomplishments, as quoted: 'Innovation and always striving to outdo your previous accomplishments whilst learning from previous mistakes.' Doing better the next time around is also something mentioned by Participant G: 'Well, um, the next time you just do it better, that's the only thing you can do.' Taking all quotes into consideration, organisers should learn from past mistakes by adapting to visitor feedback and strive to surpass previous accomplishments in their ventures.

- **Theme 4: Market responsiveness**

Closely related to the first three themes in this category, organisers should avoid making past mistakes by communicating and adapting to changing market trends in order to stay current and relevant for the purpose of satisfying market needs. Theme 4 in this regard associates itself with the ability to be responsive towards market changes. The obligation to do so is evident in Participant F's comment: 'I mean I guess the best thing we could do when it comes to the change, is find out what it is and adapt to it, see how we can satisfy whatever it might be.' Participants also stated that it is important to understand visitor needs as it can influence publicity and attendance numbers/ticket sales. This is evident in the statement:

'Well for us it’s important because ja, it takes money for us to host the event, so we need to at the very least cover our costs. To do that we need to of course sell the tickets, and have people attending and have good publicity for next year, so we need to understand what people want and what they don’t like...' Participant G also raised a similar concern in that people might lose interest or won't attend if their needs are not satisfied, as evident from the statement: 'Okay, um, target market, if the, you need to satisfy their needs because otherwise it’s going to be useless to have the whole event because they don’t really want to come, because it doesn’t interest them.'

- **Theme 5: International inspiration**

When looking abroad, many of the biggest and most popular video gaming events take place overseas such as the Electronic Entertainment Expo (E3) in Los Angeles, CA, the Game Developers Conference (GDC) in San Francisco, CA, and Gamescom in Cologne, Germany to name but a few. Additionally, many of these events take place in developed countries with developed video gaming industries (c.f. 4.5). Attending some of these shows or even researching these video gaming industries and events can provide valuable information on how local video gaming events can adapt to new trends and technologies. This strategy, if followed by Participant C's organising partner, as evident from the quote '...well just put it this way, my partner [mentions the name of an organising partner] goes over to some of the Cons overseas and has a look at what's happening there, that's part of how he does, we look and see what's happening, well he's an Australian so he goes to some of the Supernovas in Aus, he's gone over to San Diego Comic Con for the last 5 years I think, so he's been following the trends and seeing what's happening there.' Participant B also suggests that one can adapt to changing trends by looking abroad as evident in the comment: 'I think one of the things is to try and see what happens overseas.' Additionally, Participant B plans to go abroad and attend some of these video gaming shows. This is evident from the comment: 'Okay, the plans are, when I can afford at least to go to the overseas shows, and to go and actually visit, so that you have a real one-on-one kind of look'.

5B.3.4 Critical success factors for hosting video gaming events

The themes for this category were formed based on the participants' responses concerning questions relating to critical success factors of the events. Critical success factors have been an interest of several supply-side studies on events (c.f. Table 3.4) and is of significance to this study. The eight themes identified for this category include *interactivity, socialisation and community building; partnerships and corporate involvement; internet connectivity; social*

media marketing; systematic growth; *matching exhibitors with attendees; affordability;* and *adapt to new trends and technologies*.

- **Theme 1: Interactivity, socialisation and community building**

Probably the most important success factor when hosting video gaming events is to focus on socialisation, interactivity and community building. Not only did the majority of participants identify its importance, but *social gaming development* was also considered the most important motive for attending the rAge Expo. This includes socialising and interacting with friends, family and people of similar interests. Getting people to interact and to have an interactive event was identified by several participants as critical to success, as evident from the following quotes:

> Participant B: 'Well again, I think the fact that it's interactive, that they, that there's something to do.'
>
> Participant C: 'They come in, they participate, they interact with the other people around, and it's basically fan satisfaction that we're really looking for.'
>
> Participant H: '...any interaction with visitors that ups their enjoyment level and their experiences is what we rely on to, you know, make the message have more longevity.'

Providing an event that focuses on sociability, community building and people playing together are some of the critical success factors identified by the following participants:

> Participant E: 'I like to think it does, because I mean we've always been a social society, that's like the big thing about us more than anything, and so even just having gamers and the people who are like gamers, who run gaming events, having them all in the same area, it helps people, it actually helps people to, it just brings the community together into one place to have fun...'
>
> Participant G: '..we want to promote the LAN culture where it you know, people come together and play games with each other.'

Concerning Participant D, having an attendee community surrounded by friendship is the strength of his event, as seen in the following quotes:

> Well, look I think the biggest strengths that we have is friendship.
>
> So I think the friendship portion of the whole event is probably the strongest point of the whole event.

This also plays into Participant A's reason for not wanting to overly expand his event, because he feels that they are at a size where they know everyone and the event is not

overwhelmed by too many different people. This is evident in the comment: 'And we're at that, we're at that size of group where, where it's just nice, where you're not overwhelmed by too many different people. Everyone knows everyone and we all have a good time.'

Taking all comments into consideration, sociability and interactivity play a major role when hosting video gaming events but one might lose some of the familiarity or friendship aspects if the event expands too much. With that said, having different people involved (organising) with different gaming communities (PC LAN community, console community, and cosplay) at the same event might alleviate this problem.

- **Theme 2: Partnerships and corporate involvement**

Partnerships and corporate involvement is a top critical success factor when hosting video gaming, considering the number of participants who mentioned its importance. Partnering with the correct people can greatly contribute to an event in many ways. One example is in the sharing of organisation load, as stated by Participant B: 'Ja, but I partnered up with the correct people, I partnered up with people that do organise games. I partnered up with people that know how to organise Cos Play, partnered up with people that said they would run the table-top gaming tournament. So, I didn't just wing it and go alone, I had lots of strategic meetings and I picked people's brains, and I continue to do so today even.' Other examples include aid in advertising (Participant F: 'So they help us, they sponsor prizes, they do a lot of like our marketing as well...') sponsoring of prizes (Participant C: '...they actually help promote the board games, they give prizes for that.'), and organising competitions and tournaments (Participant B: 'They also had tournaments, so for the very competitive gamers, gamers that want to play.'). Furthermore, collaboration between partners can provide beneficial support to both parties as evident from Participant A's statement: 'So, it's a ton of collaboration between me and them. Ah, I share their Twitch stream, they host the server for me and, so we both win. They get the viewers, I get the show to take place, the competition.' For a more detailed summary on contributions made by role-players refer back to Table 5.30.

In addition to attracting the correct partners one should also approach corporate partners to come on board for an event. According to Participant E, getting a corporate partner involved is of necessity and could lead to momentum for others to come on board. This is evident from the quotes:

> So, now we've got, the technology is available, so we just need to obviously get corporate partners on.

> So that was the main aim, to get, if you can get one corporate partner on board, that's how you can start getting the rest as long as you can keep that momentum going.

According to Participant C, corporate buyers are the ones with money and they can pay for the space at an event. This is evident from the quote: 'So it's not a big corporate show, although we're trying to get more of the corporates in, because they've got money to pay for space.'

- **Theme 3: Internet connectivity**

Without internet connectivity, many video gaming events would probably not exist. That is because various crucial event activities and technologies require internet connectivity, such as tournaments, game updates and downloads, online multiplayer events, online gameplay demonstrations, twitch streaming and other live streaming services, social media networks, LAN gaming, and this is to name but a few examples. According to Participant G, the availability of the internet is considered a success factor, as evident from the quote: 'Other success factors. Ja, I also think the internet...' Having people updated and happy is considered the primary thing to get right at the event according to Participant A: 'They're all updated and everyone's happy. So, that, that for me is the, the prime thing to get right at any event.' In addition, Participant A identified the need for internet at his LAN event several years ago, as quoted: '...I think it was about five years ago I started saying that the internet needs to be a LAN...'

Not only is internet important at video gaming events but the stability and speed of connectivity. This plays a big role in providing peak gaming experiences, as stated by participant A: '...the network, to keep the network free-flowing and ensuring that the gaming experience on the floor is at peak performance.' Participant B also identified the need for adequate connectivity for providing successful gaming tournaments, as evident in the statement: 'One, because you need, ah, clean data if you're going to do a successful gaming tournament.' Having a stable networking infrastructure was also identified as a key success factor by Participant D: 'Okay, so number one I would say is that everything is organised correctly, [unclear], the infrastructure is very important, the stability of the infrastructure is very important on both the networking and the power side.'

Consequently, not only is the availability of internet important at video gaming events but so too is the speed and stability of the network. These are very important aspects to consider when hosting gaming tournaments and ensuring good gaming experiences.

- **Theme 4: Social media marketing**

As previously mentioned (c.f. 5B.3.3), social media is a valuable tool for communicating to visitors and potential visitors and for gathering information on changing market trends. Social media is also a great tool for marketing video gaming events as identified by several participants who use social media. Additionally, three participants identified using more than one social media platform for marketing. This is evident from the following quotes:

> Participant E: 'Firstly we also did a few Facebook and Twitter campaigns. Targeted campaigns towards obviously the gamers who are interested in e-sports, and also gamers who are interested in playing in the games, and who are focused on game development... So it was generally around 25% each, So 25% Google, 25% Twitter, 25% Facebook and then 25% the subscriber data base.'
>
> Participant F: 'Well I mean our target market, like the established one would be kind of who engages with us on social media... Our main three are Facebook, Instagram and Twitter, so we can kind of get a very large base of people who only have one of those three.'
>
> Participant H: 'Yeh that's what I'm talking about, the social platforms, so when I say 'social' I'm including Twitter, Facebook, Instagram..'

As for Participant G, he did not explicitly mention using several social media platforms but did indicate Facebook to be the main one he uses, as evident from the quote: 'Ja, the main one is actually Facebook, um, mainly we add photos on Facebook and people communicate to us through Facebook, ‘cos it’s just easier.' Additionally, Participants A, B, C and D all have Facebook pages dedicated to their respective events. It is therefore suggested that Facebook, amongst others, is a relevant and important social media platform for video gaming events to market themselves and communicate with followers.

- **Theme 5: Systematic growth**

Most participants (all besides participant D) indicated they would like to expand or grow their events in one way or another but some (Participants A, E and C) identified that in doing so one should not rush growth. According to these participants there are some factors to consider before expanding. One factor to consider is money, as identified by Participant A: 'I would definitely like to expand that, ah, but as I say it’s, I have to get money in the bank so I can save up for, for the jump to the bigger venue... So, when the group is ready, when the group’s finances look better, then sure, we can take it into that league and go right, we’re ready to go into this hall, we’ve got 400 plus attendees…' Another factor to consider is growing at a suitable pace, as evident from Participant E's comments:

> ...the thing is, we’re actually moving at such a fast pace, as Barry at the event also mentioned, that we need to actually slow down a little bit.
>
> ...obviously we need to grow at our pace, because we can’t like jump the gun.

Participant C also recognized this factor in the comment: 'Getting enough people through the door and enough store holders, we knew we weren’t going to do it the first 2 or 3 years.' He also indicated that in 2015 the event hosted 2 000 to 2 500 people and by 2018 they had 5 500 attendees, but isn't at the 30 000 mark yet. This is evident from the quote: ‘Last year I think it was sitting at about 5 500. So we’re not up to the 30 000, but considering we were 2 years before, we were doing about 2 000 – 2 500, where we have sort of doubled, doubled the number of people.' Similarly, the rAge Expo, together with the NAG LAN did not start with 35 000+ attendees back in 2002 with its inception, but rather with a few hundred attendees (The Lime Envelope, 2010: internet). Therefore, growing video gaming events takes time and should be done at a suitable pace if financially feasible.

- **Theme 6: Matching exhibitors with attendees**

There are various gaming brands, merchandise, toys, art, hardware, software, accessories, peripherals and other related items to be found in the video gaming industry. Evidence of this can be found when browsing through the statistics posted by the UK Interactive Entertainment Association (Ukie) covering the UK's video games industry (see https://ukie.org.uk/research). Unfortunately, not all consumers of video gaming products and services have similar interests. This is where consumer research and expertise come in and the ability of organisers to match exhibitors with attendees. Having suitable exhibitors can play a huge role for events as evident from Participant G's comment: 'Ja, um, so I think also the, the types of um, exhibitors we, we draw, play a very big role...' Besides attracting attendees, stall holders also needs to do well as stated by Participant C: 'Obviously we want our stall holders to do well, because then they’ll come back, and obviously a lot of them are providing stuff that the fans really appreciate, because we've got a lot of small stall holders and people who are crafters, and artists that come along to the show, and they like dealing directly with the public.' According to Participant B, having passionate exhibitors with valuable offerings also played an important role in his event, as evident in the quote: 'So, the exhibitors, the passion that they had and what they’re offering to the visitor was important.' Furthermore, Participant B stated: 'You know, to put the right exhibitor with the right visitor.'

Therefore, it can be suggested that by identifying the needs and gaming behaviours of attendees, one can identify the appropriate type of exhibitors to attract for the event. The matching of these two parties could potentially lead to both exhibitor and attendee

satisfaction. Fortunately, part A of this section reveals the demand-side results both to gaming behaviours and attendance motivations of visitors to the rAge Expo. This information could help the rAge Expo, as well as other video gaming events to identify suitable exhibitors for their respective attendee markets.

- **Theme 7: Affordability**

Event affordability is the main concern identified among rAge Expo attendees. Although all four segments of attendees vary on this matter (c.f. Table 5.20), it remains the lowest rated evaluation aspect of the event. Pricing is not only a weakness of the rAge Expo but one that was identified by Participant B: 'So, A: they're competing each other with price, where here it's a take it or leave it attitude, so weakness can be the price entry.' and Participant E: 'There was only one comment about probably only the pricing...So, next year if we move to a little bigger venue, we will reduce the price... So, the pricing is the main issue...' On the other hand, Participant F identified pricing to be one of his strengths and success factors, as evident from the quotes:

> ...we are generally quite cheaper than other conventions...
>
> ... making it cheaper and then that allows us to appeal to more people who might just want to pop in and it's not too heavy on the wallet.

Nonetheless, pricing has to match the target market and the benefits obtained from the event. This is evident in Participant E's statement: 'Firstly, if you select your target market as the, let's say high school age, then you know your pricing has to be adequate. If you're going up for more corporate range, then your pricing obviously has to meet that, and obviously there is, the benefits have to equal to what you're pricing.'

- **Theme 8: Adapt to new trends and technologies**

This theme has already been touched upon in previous categories and their subthemes (c.f. 5B.3.3). Nonetheless it remains a critical success factor for hosting video gaming events. It is important to stay on par with the newest technologies and trends, especially in a constantly evolving and changing industry such as the video gaming industry. This is something participant B also identified in the comment: 'So, it's, it's never boring, there's always something new, there's always somebody overseas, ah, developing.' As an ever new and changing industry, organisers need to remain updated on the newest games as identified by Participant D: '...we try and keep up to date with the latest games and so we always try and cater for everybody.' As a technology-based exhibition on video games, having old technology could lead to negative visitor experiences, as identified by Participant H: 'We are a tech-based exhibition and we always need to stay ahead of the trend,

showcasing outdated tech will result in a negative visitor experience and thus a drop in attendance and ultimately the end of the show.' Furthermore, participant H also commented: 'We always want to have new and exciting stuff, and new and exciting stuff might be something as simple as better interaction with the visitors by way of a stupid little game that you play on your mobile phone.'

When looking at the reasons why visitors at the rAge Expo, 'To get updated on latest in gaming development′ is one of the highest rated items in the factor: *Social gaming development,* while the items 'To test the latest gaming gadgets, gear (VR), PC hardware and consoles' and 'To demo/test the latest in upcoming games' are found in the factor: *Following gaming developments.* Both these factors are considered the most important reasons for attending the rAge Expo. Therefore, it is undeniably evident that organisers should remain up to date on the latest games and technologies as it could lead to better visitor satisfaction.

5B.3.5 The state of video gaming events in South Africa

Four sub-categories with six themes (altogether) were identified for this category. The sub-categories are presented in a SWOT analysis format, namely strengths, weaknesses, opportunities and threats, while the six themes are numbered in accordance with this format. The themes identified within these sub-categories derive from the SWOT analysis questions concerning the events organised by participants, as well as questions related to the perceived state of South Africa's video gaming industry and how video gaming events can be used to facilitate tourism. Furthermore, the sub-categories are accompanied by one or two themes that specify particular strengths, weaknesses, opportunities or threats mentioned by more than one participant. The sub-categories and their respective themes were identified as follows:

5B.3.5.1 Strengths

The following theme reveals a strength which numerous participants identified about the South African video gaming industry.

- **Theme 1: Growth potential**

The video gaming industry is an entertainment industry that is growing annually at a staggering rate. Several participants also identified this to be true for South Africa when referring to the current state of South Africa's video gaming industry. This is evident from the following quotes:

Participant E: '...the thing is, we're actually moving at such a fast pace...'

Participant G: 'Ja, I think the gaming industry in South Africa it's, is busy growing really because there's a lot of kids actually now, um, having the skills to make games, develop games.'

Not only is the South African video gaming industry growing but it does so in a struggling economy, as commented by Participant H: 'I think it is doing well, it is growing. However, the SA economy isn't exactly healthy.' Furthermore, Participant D also identified this growth but added that he thinks South Africa is globally competitive, as evident from the quote: 'Look, it is getting bigger and bigger and bigger and I think South Africa is competitive probably worldwide.' Based on growing statistics (c.f. 4.1) and by the quotes above, it is undeniably evident that South Africa's video gaming is growing and one should take advantage of such information to validate support for this industry among governing officials and potential corporate sponsors when hosting video gaming events.

5B.3.5.2 Weaknesses

The following two themes, namely a weak economy, and lack of budget and funding, identify weaknesses that not only affect the video gaming industry, but video gaming events as well.

- **Theme 2: Weak economy**

As identified in the previous category by Participant H, South Africa's video gaming industry is growing even though the economy is unhealthy. This causes concern for consumers as it leads to games becoming more expensive, as stated by Participant B: 'So, now what's happening is if, and this is a crazy sort of thing, is that as our currency deteriorates new gaming will not grow because of the cost per new game.' Not only does a weak economy impact spending on video games but also the ability of consumers to attend video gaming events, as commented by Participant A: 'Well, ja man, other, otherwise it's a dying thing in South Africa, and it's a sad story. It's, it's the consumer at the end of the day that's suffering, that doesn't have the money to go out and do these things. And, um, ja, the tougher in the economy the tougher it is for all of us.' Therefore, weak economies can both impact consumer spending and restrict the ability of video gaming event attendance.

- **Theme 3: Lack of budget and funding**

A limited budget or a lack of funding is a weakness identified by several participants, as is evident from the quotes:

Participant C: 'Well weaknesses of the event, we don't have a lot of capital behind us...'

Participant G: 'I think the lack of funds, or the lack of, um, partnership with other companies.'

These types of limitations can negatively impact video gaming events in various ways. Concerning Participant F, this means having a smaller budget to do marketing, as evident from the quote: '... so it is just a lot of marketing because that stems from our slightly lower budget than other people have, and other conventions in Cape Town, so lower budget, less to use at our disposal also then less of a marketing budget...' Some organisers such as Participant A rely on the money made from these events to budget for equipment upgrades as it could potentially threaten the livelihood of future events. Evidence of this remark is evident in the following quote: 'So, my threat is that I don't make the money back fast enough to upgrade the equipment to the next tier.'

Consequently, budget restraints should be taken into account when wishing to expand video gaming events as one should not rush growth as previously mentioned as a critical success factor. Furthermore, one should stay current and focus on matching exhibitors with attendees, while keeping events specific to the needs and behaviours of its attendees (use of free social media platforms) as not to waste funding on irrelevant technologies and brands or expensive venues. This is but a suggestion for alleviating budgeting constraints.

5B.3.5.3 Opportunities

The following two themes identify opportunities organisers can take advantage of when hosting video gaming events.

- **Theme 4: Co-operation through tournaments**

A problem identified by Participant C is that some video gaming events do not get along, as shown quoted: 'Well the fact that as far as I know, everybody is at everybody's throats, I don't think it's a really good thing, I think it will rationalise over the next couple of years and some major players would be around.' The same idea is also evident in Participant B's comment: 'I, I think, ah, what we're sitting with is a potential land grab, there's a lot of pretenders, to, ah, that they're the best organisers, and they're doing various e-sport tournaments etc. I think, if that's what you're alluding to. Ah, it could damage the industry because they're getting hold of sponsors, and they're getting these guys to pay huge amounts of money and the return's not coming out the other side.'

Seeing that several video gaming events lack funding or financial support, and are highly social and community-driven affairs this behaviour does not support growth or collaboration.

This is not to say that healthy competition does not inspire innovation but rather that rivalry in this manner divides gaming communities and restricts attendances. Fortunately, there are opportunities for video gaming events to support one another and one way of doing this is through tournaments. Having teams from other events could create inter-community collaboration. This is something Participant D wishes to achieve in the quote: 'You know what, we spoke about it and we said what we plan to do and probably next year is to see if we can have a chat with the other gaming communities and then host an inter-community event and we will send one of our own teams...' Doing more tournaments is also an opportunity identified by Participant B: 'In other words, for me to apply my mind more and say, okay what trends are happening? Where we going? Doing more tournaments.'

Furthermore, a collaboration through tournaments has the potential to facilitate tourism. According to Participant G, tournaments are the best way to facilitate tourism since his event has hosted tournaments that attracted teams from other cities and provinces. This is evident in the quote: 'I think with the tournaments is the best way actually. Because if you go and look, um, the tournaments that we're playing at [mentions the name of the event] is attracting people from Durban and from Cape Town, they're actually flying here to come and, um, do the gaming.' Participant H on the other hand admitted to having hosted international visitors at his event in the quote '...we have been fortunate enough to have seen some amazing international individuals and teams visit and compete at [mentions the name of the event] through the years.'

Taking the above as a whole, tournaments provide a great opportunity for events to support one another, encourage gaming communities to attend different events and hold the potential of facilitating tourism.

- **Theme 5: eSports and cosplay**

In 2012, eSports was valued at US$ 130 million, by 2017 it was valued at US$ 655 million and is expected to grow to US$ 1.65 billion by 2021 (Statista, 2018b:internet). According to a China Research and Intelligence (CRI) Report (as cited by Clark, 2017:internet), the global market revenue of cosplay costumes and wigs was valued at $11.7 billion and $561.5 million in 2014, respectively and is expected to reach revenues of $23.6 billion for costumes and $1.1 billion for wigs by 2019. If anything, these statistics show that eSports and cosplay are highly lucrative and opportunistic industries that are rapidly growing. When presented with the question of opportunities for the event, Participant H simply replied: ' Growing eSports and cosplay'. Individually, Participant E identified that the main focus should be on growing eSports, in the quote: '...the main focus was eSports because that's the kind of thing that

needs to grow even more.' On the other hand, Participant F suggested that bringing in international cosplayers can promote them at an international level, as quoted: 'Everyone else that has the ability to bring people in, that was the Comic Convention, Fan Con, they bring in a lot of international guests, so I think we can do the same thing and if you bring in other cosplayers or good gaming celebrities, that helps to promote us at an international level...'

5B.3.5.4: Threats

The following theme identifies a threat that could negatively impact attendance numbers to video gaming events that mainly focus on LAN gaming.

- **Theme 6: Home internet and LAN**

A huge contributor to a growing video gaming industry stems from faster internet speeds and larger coverage, but the same results might not necessarily be true for LAN-focused video gaming events. This observation is evident from Participant A's comment: '...as far as the internet, ah, distribution around South Africa, it is improving and, ah, there is more gamers going online...' but '...as far as LAN gaming goes it's a sad story, yes.' The ability to access data from home has also changed the dynamic of people bringing their gaming setups to a venue as noted by Participant B: '...dynamic has changed a lot now because you've got data at home, and you got uncapped and you got all of that. So, why do I need to take my computer to a venue for a weekend? I can plug in at home. I can download at home, I can do all of that.' With that said, video gaming event organisers, specifically LAN-focused events, should respond to changes that might threaten the livelihood of the event. One way of responding to this threat involves diversifying the event so that it appeals to more audiences. Having diversity at the event is one of the main objectives identified by Participant B: '...diversity is probably the biggest thing...' because of the '...diversity of the visitor audience...' He also went on saying that video gaming is a diverse and exciting field, as quoted: '...it's the diversity, it's, it's an exciting field...', and that one has to keep up as 'technology changes' since the industry is constantly changing, as quoted: 'But here, it's almost you can't keep up. And that's what's happening with computers. You literally bought a computer and software, and tomorrow it's out of date.' Therefore, it can be implied that when one diversifies the content of a video gaming event that said content should be up to date and match the diversity of needs of its target audiences (c.f. 5B.3.4).

5B.4. Practical implications based on supply-side themes

The following section provides a critical synthesis of the themes identified from a supply-side perspective. This includes recommendations made by the researcher and practical

implications presented by the themes. The recommendations made in this section can be used by industry decision-makers or organisers as strategies or guidelines for hosting successful video gaming events. See Table 5.31 for the recommendations made based on theme findings.

Table 5.31: Critical synthesis of practical implications and recommendations based on supply-side themes

Main categories	Identified themes	Observations	Recommendations	Practical implications
Factors for selecting a venue	Location	The location of a venue can influence sociability aspects, determine the type and number of visitors, and can influence the cost of facilities	• Select a venue situated in a safe location that allows attendees to move freely inside and outside the venue hall. • Select a venue that is in close proximity of the target audience for ease of accessibility. • Avoid affordable venues if it compromises accessibility, size/space or the safety of visitors.	• A venue that is affordable could allow ticket prices to be lowered. • An adequately spaced venue prevents overcrowding or space being wasted. • Spacious venues allow social activity to take place. • Unsafe venues or venues situated too far from target audiences can discourage attendance.
	Size/space	The size of a venue can determine the number of visitors and exhibitors	• Select a venue adequate for the number of visitors and exhibitors who will attend.	• An adequately spaced venue avoids overcrowding or space being wasted. This, however, implies that one selects the venue with the target audience in mind.
	Price and affordability	The price of a venue can determine ticket prices and the ability of an event to be hosted there	• Select an affordable venue that allows ticket prices, as well as exhibitor fees, to be lowered. • Come to an agreement or partner with venue owners to receive discounted rates. It is important for stakeholders to collaborate with and support one another.	• Affordable venue makes it easier and more accessible to host video gaming events on tight budgets. • Affordable venues could enable organisers to focus more financial resources on other aspects such as marketing or network infrastructure.
	Onsite services	Onsite services provides immediate responsiveness to problems that might arise at the venue	• Select venues with onsite service (24 hour) as it allows problems that could arise to be taken care of immediately or hastily. Services pertaining to electricity and internet problems are of particular importance.	• If problems should arise at the venue and are not hastily addressed, it could hamper memorable experiences and discourage future attendance.
	Internet connectivity	Most, if not all, video gaming events relies on the internet for several activities (LAN, eSports, downloads, streaming etc.) to take place	• Select venues that provide fast and stable internet connections. This includes selecting a venue with adequate power supply to avoid power shortages or one with backup generators.	• Fast and stable internet allows for uninterrupted play and good download speeds which would otherwise cause 'lag', frustration or lower visitor satisfaction if not given priority.

Main objectives for organising events	Socialisation and interactivity	The most important objective of video gaming events is to get people to socialise and interact with activities and other people with similar interests	• Provide activities at the event that encourage socialisation such as LAN tournaments, team-based competitions, table-top games and lounge areas. • Provide activities at the event that foster interactivity such as having exhibitors exhibit, retail shops, demo booths, developer panels, local developer showcases, signing and alpha or beta stage testing stands.	• *Social gaming development* is the most important reason for people to attend video gaming events. If organisers do not focus on this area it could cause events to fail or dismantle in time. • Socialisation at events also promotes community building and serves as a hub for people of all facets of gaming to interact and share ideas and interests. Additionally, organisers could potentially meet and make new partnerships through social activities.
	Fun and enjoyment	The second most important objective of video gaming events is to provide a fun and enjoyable event.	• Use social media (Facebook, Twitter or Instagram and Twitch) or print media (magazines) to communicate with 'fans' and find out what interests them. • Diversify the event to include a broader range of 'Geek' culture elements such as table-top, cosplay, comics, card game, anime and fan art.	• By listening to 'fan' input, organisers can identify trends and new activities that could cater to the 'fans' and their enjoyment factor. However, if 'fans' are ignored it could divide the visitor base or alienate long-time attendees. • Because video games cater to a diverse audience, having different things to do can cater to different interests. Although, it should be noted to avoid activities that do not resonate with the target audience.
	Competitions and prizes	Competitions and prizes is the least important motive for visitors to attend the video gaming events (rAge Expo) but the third most important objective to host it	• It is recommended, based on visitor feedback, to focus less on providing competitions and prizes and to focus more on socialisation, interactivity and keeping people up to date on the lasted developments. • If competitions and prizes are a main objective of the event it is recommended to obtain sponsors that sponsor target audience attractive prizes. • Partner with other events to have different teams compete at different events	• A focus that is too strongly on competitions and prizes could discourage the mayority market to attend and in its stead could attract a smaller niche market.
	Buyer-supplier (seller) interaction	Buyer-supplier interaction is the fourth most important objective of video gaming events and is one that influences purchase behaviours.	• Since it is also a critical success factor, it is recommended to obtain appropriate exhibitors that match the need of the visitors attending.	• Matching the needs of visitors with exhibitors could encourage higher spending. It could also be profitable for exhibitors and encourage exhibitors to return. • Discouraged exhibitors due to weak sales could cause an event to have a bad reputation among retailers.

	Passive financial endeavour	Not all organisers host video gaming events for financial gain	• Do not primarily host video gaming events to make money as it would detract from the motives to why visitors attend it (to socialise and to get updated on video-game developments). • Money does however play an important part in livelihood and growth of an event; hence it is recommended to first focus on the target audience and their motives for attending (ensure stable growth and return visits) before branching out to a larger audience.	• By putting the needs of the visitors first, organisers can focus on growing a community whereas growing the event too fast as a money-making endeavour could alienate visitors due to a lack of social connection. • Word of mouth is the most influential form of marketing amongst attendees (c.f. Table 5.4) and if attendees or exhibitors feel financially exploited it could discourage future attendance.
How to deal with changing market trends	Stay relevant and current	Video gaming events should adapt to new technologies and markets and stay up to date on new trends	• Communicate with stakeholders on a regular basis to get updated on the latest developments. • Communicate with 'fans' and subscribe to online gaming channels to be informative on the latest trends.	• Video gaming is a rapidly evolving technology-driven industry and if organisers do not keep up with these advances and trends the technology and games presented at events could end up obsolete.
	Social media engagement	Many video gaming event organisers use social media to communicate with 'fans'/visitors.	• Use social media channels such as Facebook, Twitter, Instagram, Twitch and YouTube to communicate with the gaming community and to receive feedback on the event. These are cheap, if not free, but effective modern- day channels to communicate and market events • Frequently engage with 'fans' or the gaming community on social media on new developments or by providing online competitions.	• By using social media channels organisers can communicate with 'fans', receive feedback, host online competitions, run surveys and market events. • Organisers can save on advertising cost if they focus more on social media marketing than say radio or print marketing. • If social media pages are not constantly updated, people might unfollow the page or lose interest in the event.
	Ongoing improvements	Organisers should identify and avoid past mistakes and surpass previous accomplishments	• Implement channels of feedback to identify and address visitor complaints. • Strive to surpass previous accomplishments and avoid activities or strategies that did not work the previous time.	• By allowing feedback to take place, organisers can identify issues or complaints that resulted in less memorable experiences. By addressing these complaints, organisers van avoid making the same mistakes with the next event • By building on past accomplishments, resources could be more effectively allocated towards the strengths of an event.

	Market responsiveness	Satisfy visitor needs by identifying and responding to changing market trends	• Identify the needs of target markets by doing market research. Market research could be done using social media channels, questionnaire surveys at the event or email surveys on Google Forms.	• Market research allows organisers of video gaming events to identify the needs, motives and behaviours of gamers/visitors, allowing for more effective marketing and resource allocation when planning events.
	International inspiration	Looking abroad at major video gaming events could provide insight into how to host local video gaming events	• Follow live streams or subscribe to channels that follow big international video gaming events. • Attend international video gaming events to observe first-hand how they operate. • Develop overseas partnerships and identify their needs for exhibiting at local events	• Compared to events such as E3, Gamescom, PAX West and PAX East, South African video gaming events are rather small. By attending or following these events, organisers of local video gaming events can identify the different key aspects that make those events successful and implement them locally.
Critical success factors for hosting video gaming events	Interactivity, socialisation and community building	The most critical success factor for hosting video gaming events and one that involves social interaction opportunities to succeed	• Develop community building by communicating event progress and sponsors to 'fans' using social media. • Use social media or magazines to allow community members to present ideas for the event, story narratives for games or fan art for competitions. • Host and live-stream private online competitions where winners can receive discount coupons or free tickets at the event. • Refer back to *main objectives for organising video gaming events* on *socialisation and interactivity* in this table	• It is more likely for visitors to return when they have a strong social connection with the video gaming event. • Refer back to *main objectives for organising video gaming events* on *socialisation and interactivity* in this table
	Partnerships and corporate involvement	Partnerships and corporate involvement play a major role in event funding and co-organisation	• Partner with people who have expertise in specific gaming or 'geek'-related activities or events to co-host activities. This could include cosplay organisers, eSport organisers or people who can set up tournaments or LAN parties. • Seek sponsors that can provide prizes or merchandise for competitions at the event. • Seek a corporate buyer to invest in the event as they can provide much needed financial aid. Start with one if possible and keep their goals in mind for the event.	• Successful video gaming events do not function in isolation. Therefore, it is important to partner with people who have experience and knowledge of specific aspects of the event. By sharing the workload with people that have expertise within a specific area lowers the risk of misguided decision-making • Having expensive or brand-related prizes will more likely attract competitive attendees and without sponsors this could mean raising ticket prices and scaring off potential visitors.

			• Communicate regularly with partners on goals and strategies planned for the event. This means having vision and mission for the event.	• If there is a lack of communication or if no clear partnership agreement is arranged it could cause partnerships to dismantle.
	Internet connectivity	A success factor that needs to function flawlessly to succeed at video gaming events	• It is recommended to provide fast and stable internet connections at video gaming events since it has already been established that many activities rely on it. • Have internet service providers on site or on standby to hastily attendant to server issues • Do extensive connection speed testings before the event commences to iron out possible issues that could arise.	• Fluctuations in internet speeds could cause 'lag' or gaming session to disconnect or stall that will frustrate players and result in negative behaviours towards the event. • A lack of internet could also restrict 'live-streaming' of eSport tournaments or the event itself, not to mention limiting exhibitors with online payment services or online game demonstrations.
	Social media marketing	Social media is a valuable tool for communication and the marketing of video gaming events to target audiences.	• Amongst attendees and organisers alike, Facebook was considered the most influential social media marketing tool for video gaming events. Therefore, it is recommended to develop a Facebook page dedicated to the event. • When doing print-marketing on posters, flyers or billboards, include the Facebook, Twitter and/or Instagram logos to inform people that they can follow the event on those social media channels. Only identify the social media channels that are active and dedicated to the event.	• By using social media platforms, organisers can market the event using and video clips. • Social media can also allow partners to communicate with one another and share event details on separate pages. • Social media can also be used to market sponsors and partners involved in the event; thus increasing the exposure of these entities. • See *how to deal with changing market trends* on *social media engagement* in this table.
	Systematic growth	Growing video gaming events should be done at a pace relevant to market demand and if financially feasible.	• It is recommended to first build trust and loyalty amongst attendees, partners and exhibitors before expanding the event. This includes establishing a loyal gaming community that would spread positive word-of-mouth. • Be financially prepared before expanding the event or when choosing a larger or more popular venue. • Communicate with partner when expanding, and introduce new expertise to share in the workload	• Video gaming events that grow too fast could result in logistical problems or cause inexperienced organisers to make judgement errors. • The rapid expansion of video gaming events could alienate loyal communities as it introduces new visitors that might have dissimilar interests. • The task of managing too many new event functions can become overwhelming and cause internal conflict amongst organisers

	Matching exhibitors with attendees	Valuable offerings play a huge role in visitor satisfaction	• Do market research to determine the needs of the target audience and identify the exhibitors that can match those needs • See *main objectives for organising video gaming events* on *buyer-supplier (seller) interaction* in this table	• When exhibitor offerings are valued, this could result in good purchase behaviours and higher visitor satisfaction. • Exhibitors are more likely to be passionate about the event and would return the next time around if they do well
	Affordability	Event pricing should match the type of attendees as it could strengthen or weaken an event's attractiveness	• Determine the type of visitors to the event (c.f. 5A.4.3.3) and match a pricing system that will suit their needs. For example, if the event is aimed at corporate market the pricing could be higher whereas pricing for high school students it should be lower. Alternatively, determine the type of gamers who attend the event (c.f. 5A.4.3.2)	• Attendees to the rAge Expo identified *affordability* to be the weakest rated aspect of the event, while participant B and E also identified similar weaknesses to their events. If an event is not affordable to its target audience it can negatively affect attendance numbers, especially when the economy is down.
	Adapt to new trends and technologies	Video-game technologies and trends are ever changing and a lack of responsiveness can result in outdated or obsolete video gaming events	• It is recommended to provide channels of constant communication with partners, stakeholders and 'fans' to stay updated on the latest trends and gaming development. • Ensure networking and information infrastructure is updated regularly to keep up with current demand. • Avoid using exhibitors that showcase or retail old games and technologies unless they provide promotional value to these items • Attend technology and game developer expos to be educated on the latest developments	• Stagnating events relaying on the same technologies and games for its entertainment will not survive in the long run since new games and technologies are introduced annually. • See *how to deal with changing market trends* on *stay relevant and current* in this table
The state of video gaming events in South Africa	Growth potential (strength)	Video gaming in South Africa is growing	• Use the statistics of a growing video gaming industry to barter for sponsorship, corporate investment and government support. • Stay educated on local and international gaming reports and developments. • Support local game developers by giving them exposure at the event. This could be done by providing discounted booths, discussion panels or a stage where they can talk about and demonstrate their games.	• Lacklustre knowledge of the video gaming industry results in poor arguments for support, sponsorship or investment. • As a constantly evolving industry, partnering with local developers, game design institutes, retailers, publishers, fan artists, and other 'geek' culture organisers could help diversify the attendee community and prevent events from becoming singularly focused and niche.

	Weak economy (weakness)	A weak economy results in gamers having a smaller budget for gaming activities	• Keep the event as affordable as possible since it could discourage gamers if they could rather use that same money on games or gaming upgrades. This could be done by choosing more affordable venues, partnering with venue owners, looking for sponsorship or reducing non-essential activities. • Encourage exhibitors to provide promotions or prizes for the event rather than having them pay for booth stands	• A weak economy can negatively impact entertainment industries as people are more likely to rather spend money on necessities. Therefore, if video gaming events do not present offerings that are attractive or if ticket prices are too steep many people might overlook attending. • If booth stands are too expensive, potential exhibitors might be discouraged for attending. This is because they would fear not making a profit or a return on investment
	Lack of budget and funding (weakness)	Several video gaming events operate on budget/capital limitations	• Focus on social media platforms as alternatives for marketing and communicating the event. See *how to deal with changing market trends* on *social media engagement* in this table. • Seek sponsors, corporate involvement and formulate partnerships to remedy financial and logistical burdens. See *critical success factors for hosting video gaming events* on *partnerships and corporate involvement* in this table. • Do not expand the event if it is not financially feasible as it could result in higher expenses than profit. See *critical success factors for hosting video gaming events* on *systematic growth* in this table	• See *how to deal with changing market trends* on *social media engagement* in this table. • See *critical success factors for hosting video gaming events* on *partnerships and corporate involvement* in this table • See *critical success factors for hosting video gaming events* on *systematic growth* in this table
	Co-operation through tournaments (opportunity)	Video gaming events can work together by having event teams compete in tournaments at different events	• Collaborate with other events to have teams compete at one other event. • Sponsor teams and host tournaments for other teams to compete. • Seek sponsorships for hosting tournaments or providing prizes for competitions	• A lack of collaboration could divide gaming communities and restrict attendance numbers due to rival agendas. • A lack of collaboration does not support a growing video gaming industry. • Collaboration between events can support tourism development as it encourages gamers or teams to compete at events in different provinces or towns.

	eSports and cosplay (opportunity)	eSports and cosplay are growing industries, identified as opportunities for video gaming events to implement	• Host eSport tournaments and include cosplay competitions at the event. • Approach and partner with organisers who have experience with running eSports and cosplay activities • Live-stream eSport competitions to gain more followership on the event. • Seek sponsors that could sponsor eSport teams or prizes. • Join cosplay communities on social media to be informed on their needs	• eSports and cosplay are growing globally into multibillion dollar (US$) industries. By including these sectors in local video gaming events, they are given exposure to grow which could benefit events financially in the long run. • eSport and cosplay provides video gaming events with diversity that could attract new target audiences and higher attendee numbers. • Cosplay can attract a creative and vibrant crowd that adds to the atmosphere of the event. • eSport teams and cosplayers alike can attract people to the event who follow them on social media.
	Home internet and LAN (threats)	An increase in internet speeds and accessibility raises concern for video gaming events	• Diversify video gaming events with activities that do not require the internet to function, including cosplay, retailer shop, fan art competitions, signings and demo booths with prototype games or gadgets. • Provide attendees with freebies and prizes to make LAN at events more attractive	• By diversifying video gaming events, gamers will be presented with several activities that will be difficult to replicate from home. It also allows the event to penetrate new markets without having to rely solely on LAN or online gamers. • By encouraging exhibitors to provide promotions and sponsors to give 'freebies' or prizes, video gaming events would have an external reward system for attracting potential visitors.

Source: Researcher's own compilation

5.5 Findings and implications

Several findings were revealed by this research. For the demand side, by analysing the attendees to the rAge Expo, different motivational factors for playing video games were identified and gamers were segmented based on these factors. Moreover, it was identified that different motivational factors existed as reasons for attending video gaming events (rAge Expo) and attendees were also segmented based on this particular set of motives. Regarding the supply-side analysis, through a set of interviews, several critical success and main objective factors were identified for hosting video gaming events. Both analyses revealed valuable insights in the video gaming industry in South Africa, the organisation of related events and the market they attract.

Firstly, five different motivational factors were identified as reasons for playing video games, arranged in order of importance: *recreational escapism, social cohesion and competitiveness, mental and creative exploration*, *role-playing*, and *self-development and expression.* A study by Hoffman and Nadelson (2010:257) revealed three main reasons or factors for playing video games, arranged in order of importance: 'escapism and fun', 'social connectivity', and 'the achievement of task-related goals through control'. The first two factors identified in Hoffman and Nadelson's (2010:257) study were similar to the first two factors (*recreational escapism* and *social cohesion*) identified in this study. Loffredo and Tavakkoli (2017:34), on the other hand, identified nine factors for playing video games, arranged by order of importance: 'story', 'violent catharsis', 'violent reward', 'social interaction', 'escapism', 'loss-aversion', 'customisation', 'grinding/completion' and 'autonomy/exploration'. Contrary to this study, escapism and socialisation-related factors were not ranked as the most important motives for playing video games in Loffredo and Tavakkoli's (2017:34) study. Moreover, Banyte and Gadeikiene (2015:510) identified three types of motivation for playing video games, namely 'intrinsic motivation', 'extrinsic motivation' and 'experiential motivation'. The factors identified for 'extrinsic motivation' included 'introjective regulation', 'identified and integrated regulation' and 'external regulation', while the factors identified for 'experiential motivation' included 'epistemic curiosity', 'social affiliation', 'perceived enjoyment', 'concentration' and 'escapism' (Banyte & Gadeikiene, 2015:510). Similarities can be drawn between the factors identified for 'experiential motivation' and those identified in this study (c.f. Table 5.5). Nonetheless, it is evident that different factors exist as motives for playing video games and/or that similar factors between studies can be ranked differently. Although different factors exist for categorising motives for playing video games, the 'motivation for playing games is reasoned by the theory of self-determination' (Banyte & Gadeikiene, 2015:513). Evidence of autonomy, competence and relatedness are seen throughout video-game motivation studies

(see De Grove *et al.,* 2016; Grooten & Kowert, 2015:83; Hoffman & Nadelson, 2010:257; Mazurek *et al*., 2015; Oliver, Bowman, Woolley, Rogers, Sherrick & Chung, 2016:393). In this study, motivations governed by autonomy are found in the factors *self-development and expression* and *recreational escapism* since the motivational items included in these factors are self-directed and pursued for personal reasons. The items mentioned include: *to keep me company when I am alone*; *to express myself emotionally*; *it helps to improve my mood*; *to cope with stress and personal problems*; and *because it is fun*. Motivations based on competency are found in the factors *role-playing* and *mental and creative exploration* since both factors include motivational items related to creation and control which require skill to perform. Items identified in these factors included: *to improve my problem-solving and strategy skills*; *to improve my gaming avatar (character) and to achieve his/her objectives*; *to feel in control of my decisions and actions*, and *to create my own story*. Concerning relatedness, the factors *social cohesion and competitiveness* contain motivational items associated with socialisation, cooperativeness or connectedness with others. The items mentioned include *meeting new people*, *being part of a team and competing as a team*, *spending time with friends and relatives* and *to feel part of a community*. Additionally, competency-related motivational items are also found in this factor, namely *being part of a team and competing as a team* and *improving gaming skills and being challenged.*

Secondly, three market segments were identified according to motives for playing video games, namely *Casual gamers, Intermediate gamers* and *Hard-core gamers. Hard-core* gamers strongly agreed to all motivational factors as reasons for playing video games. *Intermediary gamers* agreed to all factors as motives for playing video games showing lower mean values than *Hard-core gamers* but higher mean values than *Casual gamers. Casual gamers* found all but one factor (*recreational escapism*) as neutral or undecided motives for playing video games. *Recreational escapism* was considered an agreeable motive for playing video games among *Casual gamers*. Traditionally, however, gamers are divided into two categories, namely hard-core gamers and casual gamers (Juul, 2009:39–45). Unlike this study that segmented gamers according to their motives for playing video games, other studies have clustered hard-core versus casual gaming/gamers according to knowledge, attitudes, playing habits and buying habits (Ip & Jacobs, 2005), genre of games played (Vanderhoef, 2013; Vermeulen, Van Looy, De Grove & Courtois, 2011) and time spent playing video games (Kowert, Griffiths & Oldmeadow, 2014; Poels, Annema, Verstraete, Zaman & De Grooff, 2012). According to Ip and Jacobs (2005:281), hard-core gamers are likely to exhibit more positive attitudes towards the medium than casual gamers. This would explain why *Hard-core gamers,* in this study, are more motivated by all the motivational factors to play video games compared to the *Casual gamers.* Ip and Jacobs (2005:281) also

identified that hard-core gamers show higher levels of playing habits ('play over long sessions frequently', 'discussion of games in forums/with friends', and ‘engaged in competition with CPU/other human players) than casual gamers. This further explains the results to why *Hard-core gamers* spend more time playing games than casual gamers (c.f. Table 5.10), and why they are more likely to attend video gaming events to socialise (c.f. Table 5.11). Alternatively, there is a distinct player-related phenomenon in that gamers are not always simply divided into two categories (Dixon, 2011:2). According to Bartle (as cited by Dixon, 2011:2), massively-multi-player online gamers can be divided into four categories, namely: 'achievers', 'explorers', 'socialisers' and 'killers'. Kabrick (2013:internet) also identified four categories to describe gamers, namely 'casual gamers', 'social gamers', 'specialist gamers' and 'expert gamers'. Since three segments were identified in this study for segmenting gamers, it is suggested that gamers can be divided into more than two categories for explaining gamer characteristics.

Thirdly, an analysis of the demand-side survey identified four factors as reasons for attending the rAge Expo, arranged in order of importance: *social gaming development, following gaming developments, gaming purchases, gaming promotions and competitions.* A literature analysis of motivational factors as to why people attend exhibitions or expositions revealed different motivational factors for different events. To start, Wei and Lin (2015:292) identified five important factors for attending food-related exhibitions in Taiwan. From a public visitor perspective, the factor 'exploring market trends' was considered the most important motive for attending, followed by 'procurement opportunity', 'others', 'collecting information', and 'social event'. Besides the factor 'others', many of these factors match those identified in this study but are arranged differently according to the level of importance. A study by Kruger and Saayman (2018:244) on a décor and design exhibition in Johannesburg revealed four factors as motives for attending, arranged in order of importance: 'market investigation'; 'design exposure'; 'value, well-being and lifestyle'; and 'escape'. The factor 'escape' closely related to the factor *social gaming development* found in this study since both included items to escape and to spend time with friends and family. However, 'escape' was considered the least important motivational factor in Kruger and Saayman's (2018:244) study, while *social gaming development* is the most important motivational factor in this study. As for the factor 'design exposure', it closely related to the factor *following gaming developments* found in this study since both included activities exposing attendees to new or trendy products or services (see Kruger and Saayman, 2018:244). In either case, both these factors were found to be the second most important motives for attending the respective events. Additionally, Lee *et al.* (2010:203) identified five exhibition attendance motivators, arranged in order of importance: 'market investigation',

'information search', 'fulfilment of business needs', 'networking opportunity' and 'reward (incentive) travel'. The first two factors are reminiscent of the factor *following gaming developments* found in this study*,* while 'Networking opportunity' (items included: 'to seek interactions with exhibitors and other visitors'; to build relationship with exhibitors for future purchase'; and 'to get involved in special events/seminars') is reminiscent of the factor *social gaming development* in this study. Once again, the order of importance in which these factors are arranged differs from those found in this study. It is also evident that some factors are newly introduced based on different exhibitions, while others are a common theme such as to gain information. Unlike the factors identified in the above studies on exhibitions, video gaming events present a unique factor that is *gaming promotions and competitions.* It is unique since, to the researcher's knowledge, it is a factor rarely identified in demand-side research on events and exhibitions. This is because many video gaming events include tournaments and competitions as their main attractions (c.f. 5B.3.2).

Fourthly, market segments were identified for visitors to video gaming events (rAge Expo). This was done by segmenting visitors based on motives for attending the rAge Expo whereby four market segments were identified, namely: *Enthusiasts, Socialisers, Trend seekers* and *Casual attendees*. *Enthusiasts* were more motivated by all factors for attending the rAge Expo compared than were any other segments. S*ocialisers* found the factor *social gaming development* to be an agreeable factor for attending rAge but found the other factors to be disagreeable or undecided reasons for attending. *Trend seekers* found *following gaming developments* and *social gaming development* to be agreeable factors for attending the rAge Expo but considered *gaming promotions and competitions* and *gaming purchases* undecided or neutral reasons. Similar to *Trend seekers*, *Casual attendees* found *following gaming developments* and *social gaming development* to be agreeable factors for attending the rAge Expo but disagreed on *gaming promotions and competitions* as a motivational factor for attending. Furthermore, to the researcher's knowledge, no study has been done segmenting video gaming event attendees in accordance with attendance motives. However, several studies do exist on event segmentation based on motivational aspects. This is evident in an analysis done on event segmentation by Tkaczynski and Rundle-Thiele (2011:427). A study by Könecke and Kwiatkowski (2016:109) released two types of visitors to a sporting event based on attendance motivations, namely 'Primary purpose event visitors' and 'Casual event visitors'. 'Primary purpose event visitors' were on average younger than 'casual event visitors', had a lower average income and stayed over fewer nights. These results are similar to those of this study when one compares 'Enthusiasts' with 'Casual attendees'. Alternatively, Könecke and Kwiatkowski's (2016:109) study identified 'Casual event visitors' to be more motivated by all motivational factors for attending the

sporting event compared to 'Primary purpose event visitors' showing characteristics more similar to the segment 'enthusiasts' found in this study. A study by Yu and Yen (2012:222) also identified two markets to an arts festival based on motives for attending. Using a two cluster-solution, Yu and Yen (2012:222) identified the markets as 'lower motivated cluster' and 'highly motivated cluster'. The 'Highly motivated cluster' was more motivated by all factors for attending the arts festival than the 'lower motivated cluster' (Yu & Yen, 2012:222). Additionally, the majority of participants (53%) were found in the 'Highly motivated cluster' similar to that of the segment 'Enthusiasts' found in this study who also were more motivated by all factors for attending rAge. Unlike the two previously mentioned studies, Brida, Misegna and Scuderi (2014:4549) identified six motivational clusters, using a cluster analysis, to segment visitors to cultural events. Brida *et al*. (2014:4549) also found that some clusters identified socialisation (with friends and relatives) important while others did not, which is not true in the case of this study, since all segments considered *social gaming development* as an agreeable or highly agreeable motive for attending the rAge Expo. A motivation-based market segmentation study done on RV and camping shows by Barbieri, Mahoney and Palmer (2009:62) segmented attendees according to five markets, namely: 'Entertainment Seekers', 'Accessory Seekers', 'RV Buyers', 'RV Service Seekers' and 'RV Industry Enthusiast'. 'RV Industry Enthusiast', unlike the *Enthusiast* segment identified in this study, was in the minority, but similar to the *Enthusiast* segment identified in this study, showed generally high interest for bonding activities as well as purchase activities. Other studies, such as the one done by Drule, Băcilă, Ciornea and Chiş (2015:268), have even identified more than six segments of visitors based on travel motivations. Furthermore, various studies on segmenting travellers or tourists based on travel motivations have also revealed different types and numbers of clusters/markets (see Chiang *et al*., 2015; Gu, Lewis, Niu, Yu, Zhou, Zhou, Gong, Tai & Dai, 2018; Saayman & Dieske, 2015; Viljoen *et al*., 2017).

Therefore, it is evident that different market segments exist for different types of events, and that motives for attending can play a role in the type of visitors attending. It is also difficult to compare the markets attending video gaming events with those attending other events due to differences in motives. However, similarities can be drawn as is evident from the comparisons drawn in the studies mentioned above.

Fifthly, several success factors and main objectives were identified for hosting video gaming events. Compared to supply-side studies done on events (see De Witt, 2006; Getz & Brown, 2006, Kruger, 2006; Lade & Jackson, 2004; Manners, Saayman *et al.,* 2015) it was revealed that different critical success factors exist for different events. In this study, eight themes

were identified as critical success factors for hosting video gaming events, arranged in order of importance: *interactivity, socialisation and community building; partnerships and corporate involvement; internet connectivity; social media marketing; systematic growth*; *matching exhibitors with attendees; affordability, and adapt to new trends and technologies.* In comparison, a study by Manners, Saayman *et al.* (2015:7-8) identified five critical success factors for hosting live music performances. In order of importance, these factors were arranged as: 'artist', 'audience', 'marketing and media' and 'technical aspects' (Manners, Saayman *et al*., 2015:7-8). When comparing these critical success factors with the themes identified in this study, similarities are drawn between 'artists' and *matching exhibitors with attendees,* 'audiences' and *interactivity, socialisation and community building*, and *'marketing and media*' and *social media marketing.* The differences between the two studies, however, lie in the level of importance that is attached to these aspects. Furthermore, a study by Cserháti and Polák-Weldon (2013:27) identified six critical success factors of international sporting events, including: 'objectives and task planning', 'contract strategy', 'leadership', 'organisational culture', 'co-operation & communication' and 'partnership'. Compared to this study, similarities can be drawn between Cserháti and Polák-Weldon (2013:27) 'partnership' factor and the theme *partnerships and corporate involvement.* 'Partnerships with local & national stakeholder' was also identified in Cserháti and Szabó's (2014:619) study as one of six success factors for organisational event projects. The other five success factors included 'project definition', 'contract strategy', 'project leadership', 'organisational culture of project team', and 'communication & co-operation with contractors & sponsors' (Cserháti & Szabó, 2014:619). However, none of these factors associated with the themes identified in this current study. Moreover, Kaplanidou *et al.* (2013:148) also identified six themes for hosting successful sporting events, which included: 'high economic impact', 'tourism development', 'event characteristics', 'event quality', 'support by and benefits to the community' and 'emotional appeal'. The themes 'support by and benefits to the community' and 'emotional appeal' shared similarities with the theme *interactivity*, *socialisation and community building* found in this study. On closer expectation, it is apparent that although some critical success factors do crossover to other events, the manner in which they are arranged can differ or the number of identifiable critical success factors may vary from event to event. It is also evident that *internet connectivity* and *adapt to new trends and technologies* are success factors particular to video gaming events since none of the above-mentioned studies had similar comparing factors/themes.

Concerning the main objectives for hosting video gaming events, five themes were identified, namely *socialisation and interactivity, fun and enjoyment*, *competitions and prizes*, *buyer-supplier (seller) interaction*, and *passive financial endeavour*. Manners, Saayman *et al.*

(2015:7, 2016:156) on the other hand only identified one main objective for organising live music performance and that was to generate money. Compared to video gaming events, this is not a primary concern for most organisers since only one participant (Participant B) identified it as a main objective while others (Participant D and Participant C) claimed that they were not doing it for the money. Although making money and generating investment is a goal of many events, especially for large events or mega sporting events (Davies, 2011:227; Matheson & Baade, 2004:1087; Pettinger, 2017:internet; Taks, Kesenne, Chaplin & Green, 2011:188), it is not necessarily the only objective for hosting it. The problem, however, to the researcher's knowledge, is that little research has been done focusing on the organiser's objectives for hosting events but rather on the benefits from hosting events (see Getz, 1997:43; Morgan & Condliffe, 2014:83; Oldenboom, 2006:56). Fortunately, studies such as the one done by Popescu and Corboş (2012:26) on cultural events/festivals, have identified organiser needs for hosting an event. According to Popescu and Corboş's (2012:26) study, organisers of cultural events/festivals have the need to increase visitor numbers, introduce new attractions and position themselves to newer market segments. In comparison, these mentioned needs were found to be more in line with the themes identified under the supply-side category on *how to deal with changing market trends* (c.f. 5B.3.3). In this category, five themes were identified on how to respond to changing market trends and included: s*tay relevant and current, social media engagement, ongoing improvements, market responsiveness, and international inspiration.* By using these themes as a guideline to respond to changing market trends, organisers could satisfy the many if not all of the needs mentioned by Popescu and Corboş's (2012:26) study on cultural events/festivals. Nonetheless, it is evident that event objectives may differ from event to event and that the themes identified in this study make a literature contribution to organiser (supply-side) objectives for hosting events.

Other categories identified in this study from a supply side included SWOT analysis themes on the state of video gaming events in South Africa and themes on venue selection. Regarding the SWOT analysis themes, it was found that the *growth potential* of the local video gaming industry is a strength, a *lack of budget and funding* and a *weak economy* are weaknesses, *co-operation through tournaments* and to grow *eSports and cosplay* are opportunities, and *home internet and LAN* are seen as a threat. Unfortunately, although SWOT analyses have been done on events (see Duran, 2013; Karadakis, Kaplanidou & Karlis, 2010; Woźniak & Fill, 2018), none are found on video gaming events nor are they presented as case studies seen from a supply side. Alternatively, SWOT analyses have been done within the video gaming industry (see Dweikat, 2015:9; Lee, Grace, Lin & Yu, 2017:683; Malaysia Digital Economy Corporation [MDEC], 2015:36-42), including a report by

Hall, Watson and Kitching (2017), which investigated the South African game development industry. Nevertheless, as far as video gaming events and market behaviours go, none of these studies or reports revealed any such information on South Africa. Hence the information presented by this study's findings will make valuable contributions to the event literature and video gaming literature in South Africa.

Concerning the factors for selecting a venue, five themes were identified, arranged in order of importance: *location, size/space, price and affordability, onsite services* and *internet connectivity*. According to Shone and Parry (2013:167) 'venue-finding is probably one of the first most important aspects of the development phase of an event.' Wodonga City Council (2018:7) later added that the 'correct venue selection is a critical success factor for an event'. In an event management planning guide developed by the Wodonga City Council (2018:7) it was identified that the need to give attention to 'location and approximate travel time to get there', 'cost of using the venue', 'services supplied' and 'site layout' shared similarities with the venue selection themes identified in this study. Similar aspects were identified by Allen (2009:203) for event planners to consider when selecting venues which included size, location, facilities capacity provided, and price. Furthermore, a study done by Manners (2011:64) identified the 'venue and technical aspects' as a critical success factor of live music events. Manners (2011:64) further suggested that it is important for management to consider location and capacity/size differences because it can impact traffic, parking, food, seating, crowd control, accessibility, and security aspects. Compared to this study, both *location* and *size/space* were identified as the most important aspects for selecting a venue. A venue-selecting theme that is unique to video gaming events, however, is *internet connectivity*. Therefore, it is pointed out that the criteria for selecting event venues vary among events.

For the purpose of the next chapter, the supply-side results were compared with the demand-side results in providing an assessment and practical framework.

5.6 Conclusion

The purpose of this chapter was to discuss the methodology used to obtain and analyse the supply- and demand-side data. Results were then drawn from the data obtained from the visitor survey of attendees to the rAge Expo (demand side) and the telephone interviews conducted with video gaming event organisers (supply side). The demand-side analysis was done in four stages: a descriptive analysis to profile attendees; exploratory factor analyses done on motives for playing video games, motives for attending rAge and on event evaluation aspects; cluster analyses to segment attendees by motives for playing games

and motives for attending rAge; and comparison analyses to highlight differences/similarities between market segments. Based on the motives for playing video games factors, three market segments were identified, namely *Hard-core gamers, Casual gamers and Intermediate gamers.* The inclusion of the segment: *Intermediate gamers* provides video gaming literature with an additional video gaming market since a traditional segmentation of video gaming markets sees gamers divided into casual gamers or hard-core gamers. Based on motives for attending rAge, four market segments were identified, namely *Enthusiasts, Socialisers, Trend seekers* and *Casual attendees.* The identification of these markets to video gaming events is a new finding presented by this study and one that adds to events literature.

In total, five categories with representing themes were identified from the supply-side data by means of a case-study approach. The categories included*: factors for selecting a venue* (five identified themes); *main objectives for organising video gaming vents* (five identified themes); *how to deal with changing market trend* (five identified themes); *critical success factors for hosting video gaming events* (eight identified themes); and state of video gaming events in South Africa (six identified themes based on a SWOT analysis). By means of literature comparison, many of these themes shared similarities with success factors and themes found in other event studies but by order of arrangement and quantity, dissimilarities were also evident. Furthermore, it was revealed that new themes were identified in this study that are particular to video gaming events (c.f. 5B.5). In conclusion, both the supply- and demand-side results make new contributions to video gaming literature and events literature.

Chapter 6: Conclusions and recommendations

6.1 Introduction

This study assessed video gaming events in South Africa from a supply- and demand-side perspective. To achieve this aim, six objectives were identified in Chapter 1 and were achieved in the respective chapters. This chapter serves to conclude the findings, while research results from Chapters 2, 3, 4 and 5 are used to make recommendations. This chapter is therefore linked to the sixth and final objective of the study, which is to draw conclusions and make recommendations based on the supply-and demand-side assessment of video gaming events in South Africa. The conclusions will be related to the respective objectives as indicated in Chapter 1. The findings include assessing both the supply- and demand-side perspective for hosting successful video gaming events. The link between these two assessments is illustrated with the help of a research framework aimed at fellow researchers and academics. The recommendations made based on the assessment serve to guide organisers of video gaming events on critical success factors and on how to approach different market segments to ensure memorable and satisfying visitor experiences. This research further contributes to the local video gaming industry as it fills the current gap in the video gaming literature in South Africa. A practical framework was developed based on the assessment aimed at (1) recognising the video gaming industry and especially related exhibitions as an important sector within South Africa's Creative Industries, and (2) how the latter can be achieved with collaboration from different key role-players. The framework finally emphasises that knowledge and awareness of this neglected sector are crucial as it sheds light on the importance of the video gaming industry among the creative industries and its value to the growth of creative tourism in a country.

6.2 Conclusions

The conclusions comprise two parts; conclusions regarding the literature reviews and conclusions concerning the results. The conclusions are linked to the objectives identified for this study as specified in Chapter 1.

6.2.1 Conclusions with regard to the literature reviews

Conclusions are drawn in this section based on the three literature review Chapters 2, 3 and 4.

The first objective of the study was to analyse the creative industries and creative tourism by means of a literature review. This objective was achieved in Chapter 2. In this chapter, it

was found that the creative industry sector emerged from the cultural industry sector as a result of individual creativity, digitalisation and intellectual property rights (c.f. 2.1 & 2.4.1). The creative industries are one of the fastest growing industries in the world that present its host nation and/or destination with various economic and social benefits (c.f. 2.1 & 2.5.5). The popularisation of the creative industries in the last two decades led to the development of several creative industry models (c.f. 2.5.1 & 2.5.3). These models (DCMS model – c.f. 2.5.3.1; Symbolic text model – c.f. 2.5.3.2; Concentric circle model – c.f. 2.5.3.3; UIS trade-related model –c.f. 2.5.3.4; WIPO copyright model –c.f. 2.5.3.5; Americans for the Arts model – c.f. 2.5.3.6) identified/classified (c.f. 2.5.2.5) several creative and cultural industries key to the creative economy, as well as creative tourism (c.f. 2.2. c.f. 2.3.3 & 2.5.3). For creative tourism to take place, the creative value (c.f. 2.5.2.1) and physical artefacts, (c.f. 2.5.2.2) of the creative industries are used as the source of attraction or entertainment within tourism (c.f. 2.3.3). Among many of the identified popular creative and cultural industry models (excluding the Americans for the Arts model and the Conference Board of Canada/Statistics Canada model), the video gaming industry was considered a core or peripheral creative industry.

Unfortunately, the video gaming industry is not recognised or acknowledged as being part of the South African creative industries sector (c.f. 2.5.6); thus presenting the industry and its activities (video gaming events) with a lack of government recognition and support. As a result, the video gaming industry is undervalued and under-researched in South Africa, presenting investment and growth obstacles to creative tourism activities (creative events – c.f. 2.3.3) that utilise these creative values and artefacts as its source of entertainment.

The second objective was to conduct a literature analysis of events and exhibition management. The objective was achieved in Chapter 3. By means of the literature review it was found that events form an important motivator for tourism and can play a prominent role in the development and marketing of a destination (c.f. 3.1). Planned events, in particular, are developed with the purpose of achieving destination or tourism-related goals (c.f. 3.3). Behind all planned events is event management, which utilises available materials and human resources to accomplish the designated event goals (c.f. 3.2 & 3.2.1). It is the role of event management to manage the needs and expectations of the stakeholders (suppliers and buyers, performers, exhibitors, event organisers and management, sponsors, and audiences/tourists/community) (c.f. 3.2.4). Within the context of tourism, event management is concerned with the production and marketing of planned events as motivators for growing tourism (c.f. 3.2.2). Planned events do not only benefit the image of a destination and its economy (c.f. 3.3.3) – it also presents the community and its visitors with various benefits

(educational, cultural awareness, employment, financial, well-being, and quality of life) (c.f. 3.3.3.1 & 3.3.3.2). A classification of planned events within tourism includes events/MICE events (c.f. 3.3.1).

Although the MICE sector contributes significantly to South Africa's tourism industry growth, little research has been done on either the supply- or demand-side perspectives of exhibition events (c.f. 3.4 & 3.4.5). As planned events within business tourism, exhibitions play an important role in the marketing mix of South African businesses and in growing local business tourism (c.f. 3.4.5). It is perturbing to find a lack of supply-and demand-side research in this sector since both sides are considered important considerations for hosting successfully planned events leading to memorable visitor experiences (c.f. 3.2.6). The reason being that supply- and demand-side options form an integral part of event planning and operations (c.f. 3.2.6). To understand the value of business tourism, it is important to understand the inner workings of this industry through research (c.f. 3.4.5). Hence it was identified that more literature on exhibition events in South Africa is needed to help grow business tourism. Fortunately, both supply- and demand-side aspects were identified in this study, which fills the gap in the current exhibition and events literature.

The third objective was to conduct a literature analysis of the video gaming industry, and this was achieved in Chapter 4. An investigation into the video gaming industry revealed that it is one of the biggest and fastest-growing entertainment industries in the world (c.f. 4.2). Since its origin in the 1940s, gaming experiences have moved beyond mere console or desktop computer play to mobile play and virtual and augmented reality experiences (c.f. 4.1 & 4.3). Technological progression and the dawn of internet connectivity have also changed the landscape on how video games transit to the final consumer (c.f. 4.4). This means that the developers or publisher can now directly provide video games via online game portals that skip the need for retail stores or distributors (c.f. 4.4). The introduction of these new platforms has also led to the emergence of new and different types of gamer markets (c.f. 4.3 & c.f. 4.4). Categorising *Gamers* is a highly debated topic of segmentation but one that has been simplified as *people who play video games* (c.f. 4.5).

Traditionally, video games were mostly consumed by a young male-dominated market but have since evolved into an industry that caters to various ages and genders (c.f. 4.5). Besides catering to a vast market, it was identified that general game-play behaviours could be explained by means of the self-determination theory (c.f. 4.6.1). This is because video gaming motives can be governed by autonomy (self-determined), competence (feeling of effectiveness) and relatedness (closeness or connectedness with others) (c.f. 4.6.1).

Unfortunately, although many studies and reports have been compiled on motives for playing video games (c.f. 4.6.1 & 4.6.2) and on profiling video gaming markets (c.f. 4.5), little is known about South Africa's video gaming market or their behaviours (c.f. 4.7). Additionally, little is found on South Africa's video gaming sectors, other than some software statistics (c.f. 4.7). It was identified that if local video gaming sectors, such as video gaming events, are to succeed, more research ought to be done on South Africa's video gaming markets - another gap in the literature which the present study fills.

6.2.2 Conclusions with regard to the results

The following conclusions were drawn from the empirical objectives. The first part consists of conclusions drawn from the visitors survey (demand side) and the second part comprises conclusions drawn from the interviews with the organisers (supply side).

The fourth objective was to assess video gaming events from a demand side by determining gaming and purchase behaviours, motives for playing video games, motives for attending video gaming events, and event evaluation factors of visitors to the rAge Expo in Johannesburg. This objective was achieved in Chapter 5. A profile of event attendees was also captured by conducting a destination-based questionnaire survey at the 2016 rAge Expo in Johannesburg (c.f. 5A.4.1). Thereafter, three exploratory factor analyses were conducted.

The first factor analysis was performed on the motives for playing video games for which five factors were identified, arranged in order of importance: *recreational escapism, social cohesion and competitiveness*, *mental and creative exploration, role-playing*, and *self-development and expression* (c.f. 5A.4.2.1). The second factor analysis was performed on the motives for attending the rAge Expo for which four factors were identified, arranged in order of importance: *social gaming development*, *following gaming developments*, *gaming purchases*, and *gaming promotions and competitions* (c.f. 5A.4.2.2). The third factor analysis was performed on the evaluation of expo-related aspects for which four factors were identified, arranged in order of agreeability: *general organisation*, *venue management*, *quality and variety of content*, and *affordability* (c.f. 5A.4.2.3).

Market segmentation was then applied to identify different gaming markets (*Hard-core gamers*, *Intermediate gamers* and *Casual gamers*) based on the motives for playing video game factors and to identify visitor markets (*Enthusiast*, *Socialisers*, *Trend seekers* and *Casual attendees*) based on the motives for attending rAge. By means of a series of multivariate statistical analyses (ANOVAs, Tukey's $B_{a,b}$ Post hoc tests, Cohen's *d* values and

cross-tabulations) the differences and similarities among the identified market segments were revealed (c.f. 5A.4 - c.f. 5A.4.3.3). The results showed that the video gaming market that plays games (c.f. 5A.4.3.2) and attend exhibitions (c.f. 5A.4.3.3) cannot be regarded as homogenous and that the statistically significant differences between the identified segments should be considered when planning to expand the video gaming sector. The results revealed in this particular chapter were accompanied by literature comparisons (c.f. 5B.5), as well as practical recommendations aimed at video gaming event organisers based on the needs of the market (c.f. 5A.4.3.2, 5A.4.3.3 & 5B.4).

The fifth objective was to assess video gaming events from a supply side by determining themes based on organisers' perspectives on hosting video gaming events. This objective was also achieved in Chapter 5. The objective was reached by conducting telephone interviews with video gaming event organisers using a set of predetermined closed-ended and open-ended questions. The data collected from the eight participants were transcribed into text, and appropriate steps were taken to analyse and interpret the data (c.f. 5B.2.4). By means of a case-study approach, several themes were identified and ranked under separate categories (see Table 6.1) (c.f. 5B.3). Also, comparisons were drawn between the themes and findings from previous supply-side research/literature (c.f. 5B.5). In doing so, several distinct factors were identified to be specific to video gaming events while other factors were identified to match or were ranked differently (c.f. 5B.5).

Table 6.1: Summary of themes identified from a supply-side

Factors for selecting a venue (c.f. 5B.3.1)	**Main objectives for organising video gaming events** (c.f. 5B.3.2)	**How to deal with changing market trends** (c.f. 5B.3.3)	**Critical success factors for hosting video gaming events** (c.f. 5B.3.4)	**The state of video gaming events in South Africa** (c.f. 5B.3.5)
• Location • Size/space • Price and affordability • Onsite services • Internet connectivity	• Socialisation and interactivity • Fun and enjoyment • Competitions and prizes • Buyer-supplier (seller) interaction • Passive financial endeavour	• Stay relevant and current • Social media engagement • Ongoing improvements • Market responsiveness • International inspiration	• Interactivity, socialisation and community building • Partnerships and corporate involvement • Internet connectivity • Social media marketing • Systematic growth • Matching exhibitors with attendees • Affordability • Adapt to new trends and technologies	**Strength** (c.f. 5B.3.5.1) • Growth potential **Weaknesses** (c.f. 5B.3.5.2) • Weak economy • Lack of budget and funding **Opportunities** (c.f. 5B.3.5.3) • Co-operation through tournaments • eSports and cosplay **Threats** (c.f. 5B.3.5.4) • Home internet and LAN

Source: Researcher's own compilation

A comparison of the quantitative research results (demand side), the qualitative research results (supply side) revealed differences between and similarities as to why visitors attend video gaming events compared to why organisers host it and what organisers consider being critical success factors. An assessment of both supply- and demand-side perspectives can be seen illustrated in Figure 6.1 which is a research framework aimed at researchers and academics.

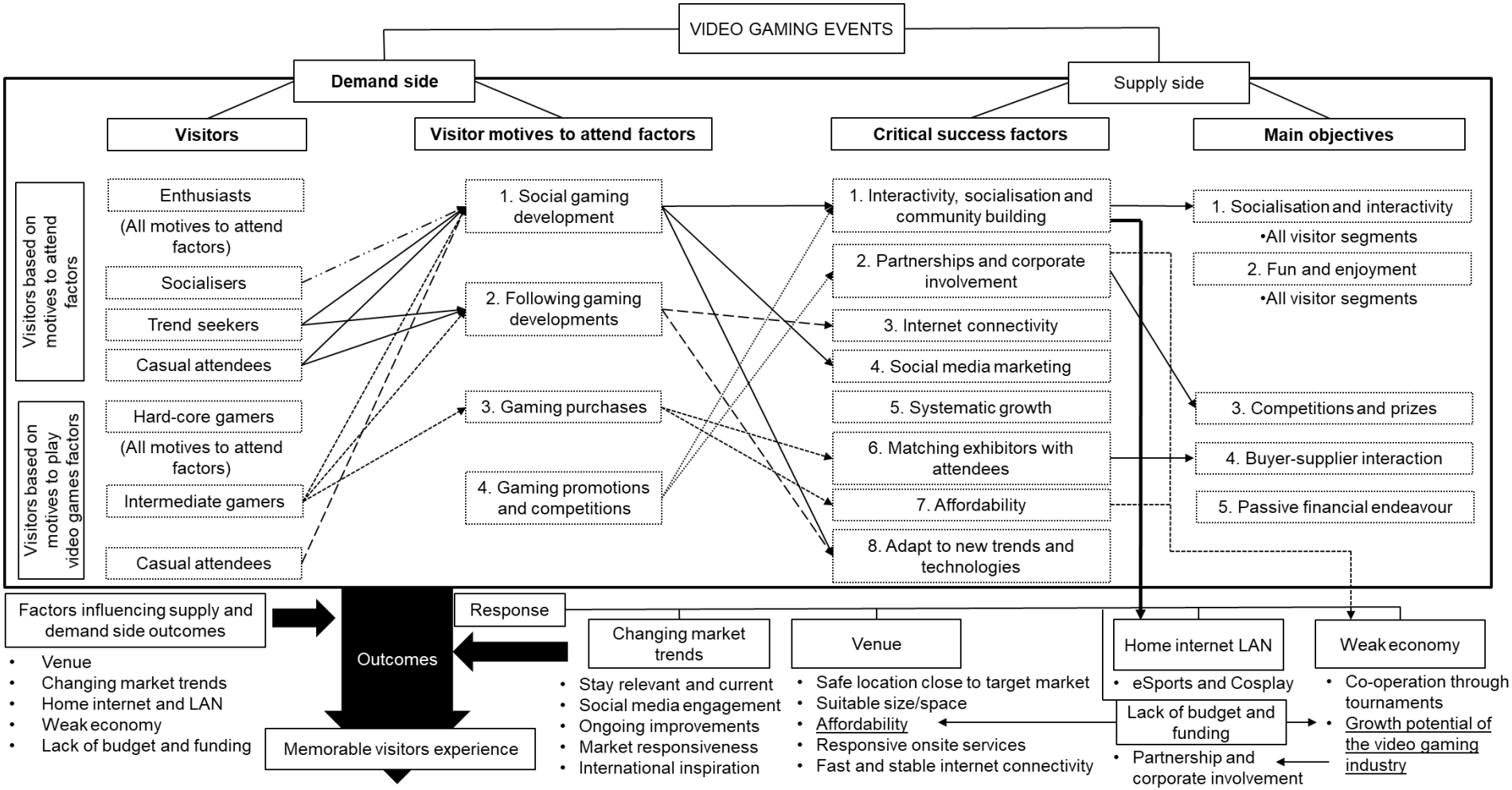

Figure 6.1: A supply- and demand-side assessment of the South African video gaming events sector - aimed at researchers and academics

Source: Researcher's own compilation

As illustrated in Figure 6.1, the demand-side aspects are represented by the different market segments and the motives to attend factors. The supply-side aspects are represented by the critical success factors and the main objectives for organising video gaming events. A comparison between the two sides revealed several aspects that are linked to one another. The arrows between the aspects represent this linkage. To avoid confusion among several overlapping aspects, the arrows were represented differently (either solid, dotted or dashed) for ease of tracing linked aspects (only a visual cue for linking aspects).

Starting with the demand-side aspects, all market segments scoring mean values equal to or higher than 3.5 for a particular motive for attending factor were linked to said factor. This showed that the market segment agreed to the said factor as an important motive to attend. *Hard-core gamers* and *Enthusiasts* alike agreed with all the motivational factors for attending. The link between the demand-side aspects and the supply-side aspects were determined based on matching the motivational factors with the identified critical success-factor themes. Further connections were made based on the impact one aspect can have on another.

Firstly, it was found that *social gaming development* was the most important motive for attending (all segments agreed to this) which matched to both the most important success factor (*interactivity, socialisation and community building*) and the main objective for organising video gaming events (*socialisation and interactivity*). Unanimously, *socialisation and interactivity*; therefore, is the most important aspect of video gaming events. In addition, *social gaming development* matched with *social media marketing,* due to the sociable and interactive nature of these media of communication, and to *adapt to new trends and technologies,* due to the motive: *to get updated on the latest in gaming developments.* The second most important motivational factor from the demand side (*following gaming developments)* was linked to the third (*internet connectivity*) and eighth (*adapt to new trends and technologies*) most important critical success factors from the supply side. The reason is that *following gaming developments* included motives relating to fast internet connectivity and the testing/demonstration of new games, gadgets, gear and hardware. The third motivational factor from the demand side (*gaming purchases*) can be linked to the sixth (*matching exhibitors with attendees*) and seventh *(affordability*) most important critical success factors from the supply side. This is because *gaming purchases* (motive to attend factor) included motives for attending relating to merchandise purchases, video game purchases and video game hardware purchases. An affordable event that matches the needs of the exhibitors and attendees alike could yield favourable purchasing behaviours. Also, *affordability* was rated the weakest aspect of rAge which included the item: *reasonable*

ticket prices. If ticket/venue prices are not affordable or if exhibitor goods are too expensive it could negatively affect *gaming purchases.* The fourth motivational factor from a demand-side (*gaming promotions and competitions*) is linked to the first (*interactivity, socialisation and community building*) and second (*partnerships and corporate involvement*) critical success factor from the supply side. The connection with *interactivity, socialisation and community building* (critical succeed factor) due to the motives *to participate in the NAG LAN* and *to compete with my friends against other players.* Both these motivational items facilitate social interactions. Motives for attending involving 'freebies', gaming competitions, and promotions and discounts shared a connection with *partnerships and corporate involvement* due to the ability of these parties to help sponsor, promote or co-organise competitions or other related activities within video gaming events.

The connections between the supply side aspects were made based on the ability, when applied, of the critical success factor/s to achieve the main objective identified by the event organisers. In order to achieve *socialisation and interactivity* (main objective), it is important to incorporate *interactivity, socialisation and community building* (critical success factor), as it is a critical success factor influencing all market segments. Although *to have fun* is a motive found within gaming promotions and competitions, it remains one of the highest rated singular motives (mean of 4.6 - strongly agreeable motive) for attending video gaming events. Therefore, *fun and enjoyment* was regarded as the main objective that applies to all market segments. The main objective, *competitions and prizes,* can be achieved with *partnerships and corporate involvement* (critical success factor)*.* Partnerships can foster the co-organisation of competitions while corporate involvement can provide revenue to offer competitions or sponsor reward prizes. To foster positive *buyer-supplier interaction* and to achieve this supply-side objective, it is important to match exhibitors' needs with those of the attendees. As a result, attendees would more likely make purchases while exhibitors will more likely make a profit that would increase their confidence and potential future return. Concerning the last main objective (*passive financial endeavour*), it is important for organisers to treat video gaming events as a passion project that serves to entertain and build the video gaming community, since gaming is mostly pursued for those reasons. Thus it is important to make a profit but not as an active pursuit or at the cost of overcharging attendees or neglecting their needs.

By matching the different demand-side aspects with their respective supply-side aspects, organisers can determine the type of market segments they wish to attract and what steps they should take to provide visitors with a memorable experience. However, before this outcome can be achieved, several influencing factors need to be taken into account as it

could affect the final result. This includes the *venue selection*, *changing market trends*, *home internet and LAN*, *a weak economy* and *a lack of budget and funding*. These aspects were identified as additional factors to consider from the supply side. To ensure that a venue suits the needs of attendees and organisers, the venue selected should be situated in a safe location, in close proximity to the target market, is spacious, is affordable, provides responsive onsite services and has a fast and stable internet connection. A response to changing market trends involves staying relevant and current, engage with attendees on social media on trends and needs, constantly strive to improve the event, be responsive towards market needs and trends and look overseas to international events for inspiration and growth opportunities. Since accessibility to the home internet is growing, many attendees might be discouraged to attend video gaming events and rather LAN at home. A response would include activities that factor interactivity (game and hardware demos) and socialisation (team competitions and developer interactions) that will be difficult to replicate at home. Furthermore, eSports and cosplay are growth opportunities with the video gaming industry and both are activities that could encourage attendees to attend. In a weak economy, organisers can look at other events and host teams from different events to foster collaboration. Such collaboration can foster travel while also attracting new markets (increase creative tourists to a location). Another aspect to consider is that although South Africa's economy is weak, the video gaming industry is still showing growth. Using this knowledge (reports, statistics and studies), organisers of video gaming events can barter for corporate investment or the formulation of partnership arrangements. As a result, partnerships can help with the co-organisation of tasks or provide discounts on equipment or facilities, while corporate involvement can help with funding. In doing so, organisers can alleviate many of the problems that come with low budgets and funding. Additionally, selecting affordable venues would save budget money that could go towards other event resources such as equipment upgrades or prizes.

In conclusion, it is evident that different market segments agree to different motives for attending factors and these factors are linked differently to the supply-side aspects. It is recommended that organisers of video gaming events match the critical success factors and main objectives for hosting with the type of market segments they wish to attract, while also responding to factors that could influence a memorable visitor experience.

6.3 Recommendations with regard to the demand-side survey

The following recommendations are made concerning the demand-side survey. The recommendations serve as important considerations for future researchers doing visitor surveys at video gaming events.

- The success of this type of quantitative research relies on collaborating with video gaming event organisers. It is important to be clear and precise on the intentions of the study and the envisioned outcomes when proposing to do research of this nature at video gaming events. Hence it is recommended to provide organisers with a written proposal on the aim of the study, as well as how the event can benefit from the research. This allows organisers to make informed decisions on the validity and feasibility of such research at their respective events. Furthermore, allow organisers to review and provide feedback on the survey questionnaire before it is distributed at the event. This allows for transparency of content but also enables organisers to make editing decisions. It is also important to ask permission to do research of this kind well before event dates, so as to increase the probability of organisers accommodating the survey while the event is still in its planning phase.
- Identify the number of fieldworkers that will be attending for ticket arrangement purposes. At the event itself, fieldworkers should be divided into various zones to ensure that a varied sample representation of attendees is obtained. Fieldworkers should introduce themselves to attendees and provide an overview of the questionnaire before distributing it to willing respondents. No fieldworker should ever disturb gamers while they are busy with a game session, demonstration or presentation, as this will negatively reflect on the event and the visitor experience. Also, fieldworkers should allow attendees time to explore the venue and partake in activities before starting to hand out the questionnaires, as this will allow for more appropriate feedback, especially with regard to spending behaviour at the event.
- The estimated number of attendees should be pre-determined to ensure that the number of questionnaires is sufficient for obtaining a representative sample. This includes printing additional questionnaires to compensate for potential losses during distribution, as was evident in the case of this study.
- It is recommended to include a question/s aimed at visitors identifying aspects that contribute to a memorable experience or what visitors consider to be critical success factors of the event. This would allow the researcher to draw a more direct comparison between the critical success factors of video gaming events from both perspectives.
- The visitors' questionnaire was only distributed on the 7th and 8th of October 2016 at the rAge Expo in Johannesburg, even though the event took place on the 7th, 8th and 9th. Within those two days, all 450 available questionnaires were distributed, and the sample size needed for this study had been reached (exceeded). Future research

can include distributing an equal number of questionnaires for each day of the event to compare the results of each day with one another.

- Many questions in the questionnaire (Section C and Section D) were related to activities found at rAge, but not all video gaming events are the same in size and scope. It is recommended to identify all available activities of the event before drafting event questions. Reducing questions down to only key event activities will reduce the length of the questionnaire, resulting in a more manageable questionnaire that does not take up much time to complete. In other words, a visitor questionnaire should be tailored based on the nature of the event and the attendees it attracts.

6.4 Contributions from the research

The contributions made by this study through the assessment of the supply- and demand side are related to video gaming events as part of the video game industry within creative industries and its contribution to creative tourism in South Africa. The contributions have literature and industry-related ramifications.

6.4.1 Literature contributions

This study has made various literature contributions in the field of planned exhibitions, creative industries and the video gaming industry. The contributions are as follows:

- To the researcher's knowledge, the assessment from both supply- and demand-side perspectives have not yet been done within a video gaming exhibition and events context, thereby, providing a benchmark for future research that can be applied in other developing country contexts as well as international video gaming events. This research therefore fills the gap in video gaming event literature in South Africa by proposing a supply- and demand-side assessment. The assessment links different gamer markets and their motives for attending video gaming events to the critical success factors for hosting video gaming events. The proposed assessment was based on the research results both from the visitor surveys and the event organiser's interviews. The assessment is ideal for researchers and academics alike to understand how demand-side aspects can be linked with supply-side aspects in providing memorable and satisfying visitor experiences at video gaming events. It also identifies different factors (venue selection, changing market trends, home internet and LAN, weak economy and lack of budget and funding) that can play an influencing role in the outcome of an event and indicate how organisers can respond to these factors.

- Several themes were identified that were distinct to video gaming events from a supply-side perspective not found in previous events literature. It was also identified that critical success factors are not homogenously arranged among different events based on the level of importance. These findings confirmed that not all events follow the same structure of critical success factors and that some factors are unique to certain types of event. Therefore, new literature contributions were made by this study within the field of planned events. The findings also advocate the need and importance for research of this nature for understanding and expanding video gaming events.
- Limited research was previously done on video gaming markets in South Africa. The identification of different gamer-market profiles and gaming behaviours; therefore, fill the gap in gaming literature in South Africa and emphasises the importance of market segmentation. Although the classification of gamer markets in this study does not represent the general South African video gaming market, insight is nonetheless provided on a market that has received little academic attention in the past. A comparison with past studies segmenting gamer markets also revealed that an additional video gaming market (*Intermediate gamers*) was identified in this study. This is another gap that the present research fills, revealing that the complexity of the video gaming market cannot only be confined to the traditional approach of a hard-core and casual classification.
- This is also the first study to segment attendees to video gaming events by motives for attending. The identification of different market segments revealed that attendees are not homogeneous. Significant differences were also revealed between the segments for several gaming behaviour aspects and event-related aspects. A comparison drawn with other studies further revealed differences between market segments attending events. Therefore, the identification of these market segments to video gaming events makes a literature contribution within the field of event studies. In conclusion, different events can have different types of markets, and it is important to distinguish between these markets to implement effective marketing strategies to attract and retain them.
- Finally, this research confirmed that the self-determination theory is an applicable theory for studying video gaming behaviours, particularly among more serious gamers (*Hard-core* and *Intermediate gamers*) who devote considerable time and money into gaming and who generally find all gaming aspects important when playing video games. Within the context of video gaming, it was identified that all three gamer-market segments (identified based on the motives for attending video

games) shared components of autonomy, competence and relatedness as motives for playing video games. All three components were evident among *Hard-core gamer* and *Intermediate gamer as* motives for playing video games, while *Casual gamer* motives were mostly governed by autonomy due to the factor *recreational escapism*. The research therefore contributed to the understanding and the application of the self-determination theory in a South African video gaming context.

6.4.2 Practical contributions

- A proposed practical framework for expanding video game exhibitions as part of the Creative Industries in South Africa was developed. The proposed framework recognises the importance of developing video gaming exhibitions/events through supply- and demand-side research as part of the video gaming industry and its importance to supporting creative tourism and the creative industries. The framework is developed from a combination of the literature review and the research results obtained in this study. The framework is ideal for industry decision-makers to identify the support needed to expand video gaming events in obtaining shared benefits. The framework also acts as a guide for hosting successful and satisfying exhibition experiences. By implementing this guide as part of developing the creative industries, video gaming exhibitions can be used to grow and expose various creative sectors functioning within the video gaming industry. Increased exposure to these sectors results in an increased creative-content creation that is used by creative tourism to bring entertainment value to a destination and attract creative tourists.

6.5 A practical framework for expanding video game exhibitions as part of the Creative Industries in South Africa

One of the biggest challenges faced in South Africa is the underutilisation of creative industries. Creative industries hold the potential of growing the creative economy and are fundamental to stimulating creative tourism. Although several creative industries are recognised and supported by the government, key industries such as video games do not receive the same attention. As part of creative tourism, video gaming exhibitions/events incorporate various sectors of the video gaming industry. The exposure of these sectors creates awareness and helps with video gaming industry growth. Unfortunately, limited research has gone into investigating these sectors, restricting the validation of video games as a key creative industry for government support. Thus a practical framework was developed for expanding video game exhibitions as part of the creative industries in South Africa. The framework identifies how a supply- and demand-side assessment contributes to successful and satisfying exhibition experiences and the role of key role-players in

supporting exhibition development. The application of the framework fosters knowledge creation vital to the expansion of video gaming exhibitions/events in growing the video gaming industry as part of the creative industries. Additionally, by applying the framework the identified literature gaps and industry shortcomings are addressed as identified in this study. The following section discusses the practical implementation of this framework in detail.

6.5.1 Implementation of the proposed practical framework

The following practical framework was developed for expanding video game exhibitions as part of the creative industries in South Africa. The purpose of the framework is to validate the importance of the video gaming industry as part of the creative industry by identifying how video gaming exhibition/events development and support contribute to shared benefits within creative tourism and the creative industries. As illustrated in Figure 6.2, the framework links creative industries with video gaming exhibitions and the role of key role-players in supporting video gaming exhibitions development. Therefore, this framework serves as a practical guideline to the industry. Looking at the framework, the first section recognises video games as part of the creative industries in South Africa and the sectors currently receiving the most attention within video games.

Secondly, the framework shows that exhibitions/events is another sector that greatly contributes to video gaming industry and one that needs to be researched and developed. The section further illustrates that by doing both a demand- and supply-side assessment, video gaming exhibitions can be successfully developed and result in satisfying exhibition experiences. The third section identifies the outcomes and implementation by key role-players in developing video gaming exhibitions/events. Lastly, it is shown that the implementation of these guidelines could ultimately assist in stimulating creative tourism and in increasing video gaming-related revenues/sales leading to shared benefits to all involved. Each of the sections will consequently be discussed in the order in which they appear in Figure 6.2.

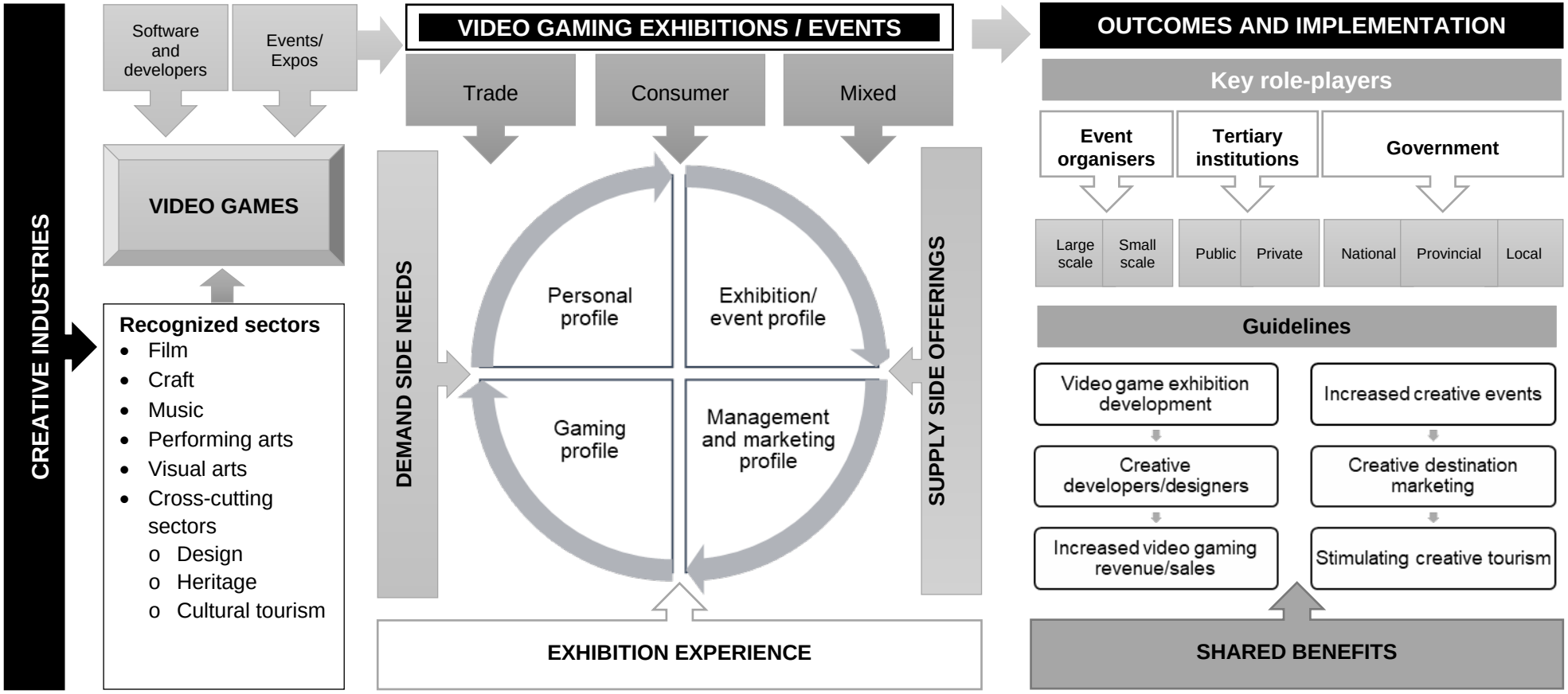

Figure 6.2: A practical framework for expanding video game exhibitions as part of the Creative Industries in South Africa

Source: Researcher's own compilation

6.5.1.1 Recognising video games as part of the creative industry sectors in South Africa

A report commission by the Department of Labour South Africa, identified film, craft, music, performing arts, visual arts and cross-cutting sectors (design, heritage and cultural tourism) as the creative industries in South Africa. These sectors are indicated in Figure 6.2. The report, however, did not recognise video games to be part of the creative industries. This is unfortunate, since video games were identified as a key/primary creative industry in several popular international creative industry models. Based on the assessment of the video gaming events in South Africa done in this study, the researcher advocates for this important sector to be recognised.

In South Africa, the video gaming industry is recognised as one of the fastest growing entertainment industries, surpassing both the film and music industry in revenues. As an industry that contributes greatly to creative economy growth, video games should therefore play an even more significant role if recognised and supported by the government as an essential creative industry. This could be achieved by focusing research on the sectors that support industry growth, to create awareness and literature knowledge. Sectors most researched within South Africa's video gaming industry include the software and developer sectors. Unfortunately, little research was found in other sectors of the South African video gaming industry such as the events sector – an important gap which this research fills. Therefore, video gaming-related events/exhibitions are indicated in the framework as a key sector that should be recognised when analysing the industry.

According to the UK games industry, events and venues are a subsector of the games-culture sector and one that showed significant annual growth. It was also identified that events such as the rAge Expo in Johannesburg, grow annually. Hence, for the sector to expand, it is primarily important that video gaming events be recognised as a valuable sector within the country's greater Creative Industries.

6.5.1.2 Expanding video gaming exhibitions and events

The literature on exhibitions usually distinguishes between three types of exhibition events, namely consumer shows (public visitors), trade shows (business visitors) and mixed shows (both consumer and trade). In the case of South Africa, most video gaming exhibitions are mixed or consumer shows. Alternatively, other forms of planned video gaming events also occur in South Africa such as community LAN events or industry forums. Therefore, the focus of video gaming events is not just limited to the exhibition sector.

As shown in Figure 6.2, when organising any type of exhibition, two aspects need to be considered: (1) the demand-side needs and (2) the supply-side offerings. This research showed the importance of matching the supply-side offerings with the demand-side needs. A supply and demand analysis is a fundamental subject in microeconomics. A role of event management is to analyse the microenvironment by studying consumer behaviours and business behaviours to make effective decisions regarding the allocation of resources and to foster positive interactions. Event management plays an essential role in the way planned events are held and organised. Planned events are hosted with the purpose of creating destination value or as an important strategy for achieving social, economic, business and/or environmental goals. Being a MICE event, video gaming exhibitions can play a valuable role in growing creative tourism as well as present a destination with social and economic benefits. Consequently, event management/organisers of video gaming exhibitions must consider both demand- and supply-side aspects for hosting successful exhibitions/events.

The visitors to these types of exhibitions; therefore, represent the demand-side perspective. It is important to identify both the personal profile (socio-demographic) and gaming profile (gaming and purchase behaviours, motives for playing and motives for attending) of visitors. By identifying attendees' age, gender, province of residence, education, occupation and even spending habits at events, organisers can formulate marketing strategies targeting markets with appropriate media/advertising platforms, at effective locations with information that will resonate with those markets. In this study, it was found that attendees averaged 23 years of age were mostly English-speaking, male, single, the residence of Johannesburg/Gauteng, travelling in groups of 5 people and were busy with a degree or some were high school learners. By using this information it is evident that schools and universities are key locations for marketing in the surrounding area while marketing should mostly be done in English and appeal to male gamer groups. Alternately, the need to attract other genders or age groups only strengthens the necessity to do personal profiling, allowing minority profiles to be recognised; shaping how new marketing and management strategies can be incorporated to accommodate these visitors.

Gaming profiles, on the other hand, enable organisers to identify the type of visitors attending based on their gaming needs, motives, behaviours and preferences. Information such as this influences the type of activities to be included or avoided, which will untimely determine the appeal of an event and whether or not visitors have fulfilling experiences. In this study, it was determined that different markets exist based on motives for playing games and attending gaming events and that these markets exhibited different gaming behaviours even though their socio-demographics were not significantly different. Thus is important to

identify the gaming behaviour of visitors or the type of games, genres and platforms presented or exhibitors/publishers might not match attendee needs resulting in negative visitor experiences and a potential loss of future exhibitors/publishers support.

Seeing that not all video gaming events have similar activities or are of similar design, it is important that type of event should match the type of attendees. The type of event is dictated by the type of offerings presented. Thus event organisers represent the supply-side perspective. Matching both sides can ensure successful events. From a supply side, it is important to profile the exhibition/event and identify the marketing and management profile. Profiling video gaming events involves identifying the type of event held (LAN, eSports, Cosplay, consumer exhibition, developer forums, developer conferences, and mixed shows), type of attendees, number of attendees, venue information, the purpose of the event and the objectives. These aspects determine the type of visitors which organisers wish to attract and the type of activities and offerings needed to fulfil those needs and event outcomes. In this study, it was found that *socialisation and interactivity* are the most important objective and success factor, respectively, of any video gaming event and one that needs to be given the utmost priority. This leads to the marketing and management profile.

In order to obtain desired outcomes and present visitors with memorable experiences, several aspects should be managed accordingly. It was identified that several critical success factors exist for hosting video gaming events and that by linking these factors with the attendees can result in successful event hosting. Also, video gaming events rely on creative value and artefacts (video games) that are constantly changing based on social demand and evolving as technology progresses. As a result, new market trends are introduced, and it is the responsibility of organisers to respond to those trends by remaining relevant and current, by engaging with visitors on social media, by striving towards constant improvements and by gaining insight from successful video gaming events hosted abroad. Event management is also faced with strengths, weaknesses, opportunities and threats that could influence the outcomes of video gaming events.

In South Africa, it was identified that a weak economy can negatively influence attendee numbers while event budget limitations restrict growth. In response, it is important to seek investment opportunities among corporate entities and formulate partnerships. Discount and co-organisation opportunities can arise from partnerships, while corporate involvement can provide much needed monetary support. This is exactly why research such as this is important, as it allows organisers to present findings and knowledge that support arguments for investment. Another threat to video gaming events is the increased accessibility of home

internet and LAN. This threat can be addressed by presenting video gaming events with activities that will be difficult to replicate from home. Among these activities are eSports and Cosplay, which are both fast-growing sectors globally. In doing so, video gaming events will support the growth of several video gaming industry sectors. The more support video gaming games provide to other sectors, the greater the level of awareness will become of the video gaming industry and its role within creative industries.

6.5.1.3 Outcomes and implementation by key role-players

Expanding video gaming exhibitions and events requires the support of three key role-players namely event organisers, tertiary institutions and the government. Video gaming events can range from small local LAN events with roughly fifty attendees to large-scale exhibitions attracting people in tens of thousands. Irrespective of the size, small or large scale, all organisers involved have the responsibility to host video gaming events that provide satisfying visitor experiences. Through satisfying visitor experiences, positive word-of-mouth can be spread leading to greater event awareness. It is important for event organisers to apply demand- and supply-side research and incorporate the critical success factors within event strategies to obtain memorable visitor experiences. Growth and visitor satisfaction can support the plead for investment and increase collaboration opportunities between video gaming sectors. Speaking of collaboration, event organisers can also support one another with tournaments where teams from other events are invited to compete. This encourages travel that in return supports creative tourism.

Tertiary institutions, both private and public, need to support video gaming exhibitions and events as well as its important role in the creative industries in numerous ways. From an academic perspective, institutions with game design and production, programming, animation or visual art courses could market them at video gaming events, informing young adults on post-school curricular activities they can pursue within gaming. Also, parents and scholars should be educated on jobs within the video gaming industry and the different qualifications one can achieve. Tertiary institutions can sponsor competitions at events on unique game design concepts or prototype games with scholarship prizes or providing students with opportunities to present winning projects overseas. This would encourage local amateur game developers to present their concepts while also supporting game developers and developers in training. Another important career development opportunity is event and exhibition management. Developing curricula at tertiary institutions should consider research of this nature to provide practical guidelines and training to students when organising exhibitions. The success of the exhibition industry relies on qualified and educated event managers. Hence it is essential for internships to be included in event management curricula

emphasising the need to bridge the gap between academic and industry perspectives through collaborations.

Viewed from a research perspective, video gaming events are great vantage points for studying gamers, gaming behaviours and purchase behaviours – an area that is severely under-researched in South Africa and one that potentially restricts investment in and support for the industry. Moreover, since little research has been done on video gaming events, video gaming event studies can thus contribute to event literature. As an example, it was identified that *internet connectivity* is a unique critical success factor of video gaming events not found in other event supply-side literature or that the markets attending video gaming events are not homogeneous. Literature contributions, such as those made in this study, hold the potential of sparking a more academic inquiry into the sector. More research sequels a greater base of knowledge that could be used to support and grow video gaming events. From an industry perspective, research reports profiling visitors can greatly benefit event organisers on attendee socio-demographics, spending behaviours, gaming behaviours and event evaluation. Organisers can use this information to improve future events by determining target markets and the resources (marketing and management) needed for allocation.

Concerning government support, video gaming events need to be supported locally, provincially and nationally. Locally, video gaming events can contribute towards establishing the destination as a creative tourism hotspot. By supporting video gaming events locally, the creative value is produced, job opportunities are created, creative tourists are attracted, the image of a destination can be boasted, and it could support the well-being and life satisfaction of local community members. Local government can support video gaming events in numerous ways from sponsoring staff, facilities, venues to financially backing the event or sponsoring public school field trips to the event. Provincially, most video gaming events in South Africa take place in the Gauteng and Western Cape provinces. Both these provinces include popular tourist cities (Cape Town and Johannesburg) that are considered to be not only the economic but also biggest creative hubs in South Africa. The provincial government in these provinces can monitor these events and provide research reports on their activities and growth. By providing provincial statistics on video gaming events, as well as on the industry, other provinces can adopt similar reports and develop frameworks that will allow a more geographic distribution of events to poorer provinces in an attempt to stimulate creative tourism and economic growth across the entire country. Nationally, the inclusion of the video gaming industry within the creative industry documents can legitimise the need for government to support this growing sector nationwide. Additionally, video

gaming events can be indirectly supported if more government funding goes towards internet-infrastructure development and event-infrastructure development.

6.5.1.4 Implementation of guidelines and shared benefits

With the support of the above-mentioned, the key role-players lend themselves to the development of video game exhibitions. With development, more video gaming industry sectors can be introduced at events, while events themselves can grow and expand into new regions and markets. This will provide more opportunities for gamers to connect socially within a gaming culture, for developers to present and demonstrate game prototypes, and for exhibitors to market themselves or increase retail sales, Coplay and eSport competitions to take place and opportunities for knowledge creation through research and tertiary institution involvement. As a result, more video gaming sectors can be exposed, leading to a greater recognition of the video gaming industry as a whole. In addition, more exposure could result in an increase of video gaming revenues/sales as more people start to adapt to opportunities presented by different sectors. An increase in sales and revenues can capture the attention of potential investors and their support for different sectors.

As a planned event within creative tourism, the development of more video gaming exhibitions/events means an increase in creative events. Creative events lend themselves to supporting local creative businesses, promoting investment, trade and technology, infrastructure development, creating job opportunities, bringing education and professional development to the local community, increasing creative sector awareness and improving the well-being and quality of life of local communities. With an increase in creative events, the more a town, city, province or country can market itself as a creative destination. A creative destination can attract creative tourists. An increase in creative tourists provides greater economic value to a destination and can boost its image. As a result, creative tourism can be stimulated, which supports the greater tourism goals of the country. In conclusion, by developing video gaming exhibitions/events, more video gaming sectors can be supported, leading to increased revenue/sales while also developing creative tourism and the shared benefits it brings all stakeholders.

6.6 Recommendations for future research and research limitation

The following considerations are made for future research concerning this study:

6.6.1 Demand-side recommendations

- Future analyses can be conducted to segment attendees in accordance with their socio-demographic or gaming behaviour profiles. This could be done to determine

differences between age groups, genders, income groups, and people residing in different provinces or between hours spent playing games, type of gaming platforms used and type of genres played. Information such as this will benefit event organisers and game developers/publishers alike as it provides in-depth profiling of different markets around which marketing and management strategies can be formulated.

- Future research should include exhibitors and retailers at video gaming events in providing a more holistic video gaming event assessment. Retailers and exhibitors can provide information on their needs, motives and objectives to attend video gaming events. This will help organisers to identify important aspects contributing to the well-being of exhibitors and retailers. From these aspects, organisers can then implement strategies to ensure exhibitor loyalty (return visits) while also using it as a tool to convince new exhibitors to exhibit. Additionally, enthusiastic exhibitor behaviours will reflect positively on the image of an event and could facilitate increased purchase behaviours.
- More video gaming events need to be approached for doing visitor surveys so as to provide a more holistic demand-side perspective on attendees. This is because different video gaming events could potentially attract different types of visitors. The market of a LAN event might differ from a Cosplay event, while attendees to an eSports event might differ from those to a developer conference. By determining different markets and market behaviours, organisers can identify and implement new strategies when expanding into new sectors to successfully attract and market to these markets. Uneducated decision-making based on new markets could result in negative visitor experiences due to a lack of need fulfilments. Also, by doing visitor surveys at more than one event, a standardised measuring instrument can be developed for conducting a visitor survey, providing future researchers with a known yet effective tool for conducting visitor surveys.
- Future visitor surveys should include more eSport- and Cosplay-related questions since they are emerging markets within the gaming industry that is growing at a rapid pace. This would identify the relevance of these sectors in local video gaming events but also what aspects organisers need to consider for successfully implementing them. A lack of understanding might never see the full potential of these sectors within South Africa's video gaming industry and the financial value they can bring to the creative economy.
- Since social media marketing has been identified as a critical success factor of video gaming events, more focused research should be done determining the different social media platforms used by attendees and the channels or personalities they

follow. This could help organisers to identify new social media marketing channels to effectively communicate and market the event while also identifying influential personalities to approach for future events. Many popular gaming personalities have a large follower base, which would most likely also attend the event if it means meeting them in person. Social media is also a great platform for targeting gamers who do not necessarily attend events. By running online surveys on these platforms, organisers can also understand why gamers do or do not attend. An understanding of the reason for gamers not attending can help organisers formulate strategies that could address those restrictions or lack of interest.

6.6.2 Supply-side recommendations

- Future interviews with video gaming event organisers can include pre-, during and post-event planning questions to identify the activities that take place during each planning phase. By identifying the activities that occur during each phase, a guide or checklist can be developed which organisers can use to successfully plan video gaming events. A guide would help direct decision-making processes, reducing the likelihood of accidentally omitting key activities. This would particularly be beneficial for new start-up video gaming events since the organisers might have limited to no past experience in event management.
- Interviews with international event organisers of popular events can take place to compare international supply-side aspects with local supply-side aspects. This would provide valuable information to local organisers seeking international inspiration. Additionally, it would mean that local developers do not necessarily have to travel overseas to obtain this information. By comparing the supply aspects (objectives, success factors, SWOT analysis, and planning phases) of local and international organisers, local organisers can identify new opportunities to expand their event, as well as identify outdated aspects of their events to avoid in the future. By adapting to international standards, local events can be more globally competitive and potentially attract more global markets and investment.

6.6.3 Industry recommendations

- Developers and publishers of video games need to be approached and interviewed to identify their perspectives on video gaming events and why they do or do not attend it. They are the value creators and the backbone of the video gaming industry. Their contributions directly influence the video gaming industry. The ability to communicate effectively, upcoming games or projects play a significant part in the

success of a video game. If video gaming exhibitions/events neglect the needs of developers and publishers, ineffective communication might result in a negative backlash that could damage the reputation of the project and cause developers and publishers to withdraw from future events. A withdrawal of developers and publishers could result in fewer games being showcased, a loss of publisher investment, and reduced attendee numbers (particularly those that support these games and companies).

- Future research can include doing national video gaming market reports. This will help paint a clearer market picture to international developers or publishers wishing to invest in South Africa. The market information allows foreign developers and publishers to identify projects or games best suited for displaying at South African video gaming events which will achieve the most desired impacts. Foreign developers and publishers are also more likely to collaborate with local gaming sectors if they have informative knowledge of these sectors. By compiling national video gaming sector reports, organisers can identify potentially new market opportunities and use the statistics to barter for investment or formulate partnerships with other sectors. The availability of these reports will allow organisers to make better-informed decisions concerning target markets and sectors to include for successfully expanding events. Additionally, since not all gamers attend video gaming events, these reports can potentially identify untapped markets within gaming. Future marketing strategies can then be developed around these markets to attract and expand the event towards a more diverse attendee community.
- The video gaming hardware sector is under-researched in South Africa and needs to be analysed. The inclusion of hardware statistics can help solidify the video gaming industry form both a software and hardware perspective. This will allow the local video gaming industry to be more comparable to international video gaming markets, revealing South Africa's level of global competitiveness. Having statistics and research done on both sectors, industry decision-makers can determine how these sectors compare and influence one another. Based on these comparisons, industry decision-makers can develop marketing strategies, influenced by international strategies, to conjointly develop these sectors (development in the one sector can positively influence the other) and untimely grow the local video gaming industry.

6.6.4 Limitations

The following limitation of this study was identified:

- A second survey was planned for rAge Cape Town but due to financial and logistical concerns, the event was cancelled. This event would have taken place at the Century City Conference Centre in April 2017. As a result, this cancellation limited visitor results concerning video gaming events to only one major video gaming event. Future research can include doing visitor surveys at more than one video gaming event to provide a more holistic demand-side perspective on attending video gaming events.

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Appendixes

Appendix A: Visitor's questionnaire

rAge EXPO VISITOR SURVEY 2016 - JOHANNESBURG
SECTION A: DEMOGRAPHIC PROFILE

1. Gender

Male	Female

2. What year were you born?

3. Home language?

Afrikaans	1
English	2
Other (specify)	3

4. Marital or relationship status (specify)?

5. Province you are currently residing in?

Gauteng	1
Western Cape	2
KwaZulu-Natal	3
Free State	4
North West	5
Mpumalanga	6
Northern Cape	7
Eastern Cape	8
Limpopo	9
Outside RSA borders (please specify)	10

6. Current status of education?

	Completed:	
Currently busy with:		
Primary school	1	1
Some high school	2	2
Grade 12/Matric	3	3
Degree	4	4
Post-graduate degree	5	5
Other (specify):	6	6

7. What is your occupation, if any (specify)?

8. What is your annual gross income? / yearly allowance?

R

9a. Are you a local resident of the Johannesburg area?

Yes	No

9b. If No in 9a, how many nights do you stay over in the area during the rAge Expo in Johannesburg?

10. Indicate the type of ticket(s) purchased.

Day ticket	Yes	No
Weekend ticket	Yes	No
NAG LAN ticket	Yes	No
Other (specify)	Yes	No

11. Where did you purchase your ticket(s)?

At the entrance	Yes	No
Online	Yes	No
Other, please specify	Yes	No

12a. Including yourself, how many people are traveling in your group?

12b. Including yourself, how many people are you paying for during the rAge Expo in Johannesburg?

13. Please indicate how much YOU, on average, spend on the following at the rAge Expo? (Complete only if you are paying for yourself and/or for other people, 12b)

Ticket(s)	R
Accommodation (if applicable)	R
Food and beverages	R
Merchandise	R
Gaming accessories	R
Video games (disc sales)	R
Video game consoles	R
PC hardware	R
PC software	R
Transportation	R
Parking	R
Contest entry fees (cosplay)	R
Hobby accessories (board & card games, gadgets)	R
Other (specify):	R

14. Including 2016, how many times have you previously attended the rAge Expo in Johannesburg?

15. Indicate any other video game events you have attended or will attend in 2016.

SECTION B: GAMING AND PURCHASE BEHAVIOURS

16. At what age did you start playing video games?

17. Name your first gaming device.

18a. Which of the following devices do you currently use to play video games on?

Game consoles (PS, XBOX, Wii)	Yes	No
Desktop or laptop computer	Yes	No
Portable game consoles (3DS)	Yes	No
Cell phone or handheld devices	Yes	No
Other (Specify)	Yes	No

18b. Name your gaming device of choice? (Wii, PS4, PC etc.)

19. Indicate the type of video game purchases you regularly make?

Digital (full game purchases)	Yes	No
Physical discs	Yes	No
Downloadable content (DLC)	Yes	No
Subscription services	Yes	No
Online/micro-transactions	Yes	No
App-based games (cell, tablet)	Yes	No
Other (specify)	Yes	No

20. On average, how much do you spend on video games (game software) per year?

R

21. On average, how much have you spent on video game hardware (PC upgrades, consoles and accessories) over the past 5 years? (excluding tablet and cell phone purchases)

R

22. What type of gaming you do you prefer?

Single player	Yes	No
Online multiplayer	Yes	No
Online co-op	Yes	No
Competitive multiplayer	Yes	No
Co-op multiplayer	Yes	No
Split-screen multiplayer	Yes	No
Split-screen co-op	Yes	No
Massively-multiplayer online (MMOFPS, MMORPG)	Yes	No
Local area network (LAN)	Yes	No
Other (specify):	Yes	No

23. Indicate the genres of games you play?

Action	Yes	No
Adventure	Yes	No
Arcade	Yes	No
Driving/Racing	Yes	No
Educational	Yes	No
Fighting	Yes	No
Fitness	Yes	No
Music/Dance/Rhythm	Yes	No
Open world/Sandbox	Yes	No
Platform	Yes	No
Puzzle/Card	Yes	No
Role-playing games (RPG)	Yes	No
Shooter	Yes	No
Simulation (flight, city, life)	Yes	No
Social network/Social media	Yes	No
Sport	Yes	No
Strategy/Tactics	Yes	No
Survival horror	Yes	No
Other (specify)	Yes	No

24. How important do you consider the following aspects when playing a game?

	Extremely important (absolutely essential)	Important	Undecided (Neutral)	Less important	Not important at all
1. Gameplay	1	2	3	4	5
2. Story	1	2	3	4	5
3. Graphics	1	2	3	4	5
4. Voice and sound	1	2	3	4	5
5. Music	1	2	3	4	5
6. Length	1	2	3	4	5
7. Replayability	1	2	3	4	5

25. On average, how much time do you spend playing video games?

per day	.	hrs.min
per week	.	hrs.min

26. I consider myself as a

hard-core gamer	Yes	No
casual gamer	Yes	No

27. Name your favourite video game titles.

SECTION C: MOTIVES FOR PLAYING VIDEO GAMES

28. Why do you play video games? Please rate the following as reasons.

	Strongly disagree	Disagree	Undecided (Neutral)	Agree	Strongly agree
1.To keep me company when I am alone	1	2	3	4	5
2.To spend time with myself	1	2	3	4	5
3.To escape from reality	1	2	3	4	5
4.To cope with stress and personal problems	1	2	3	4	5
5.To eliminate boredom	1	2	3	4	5
6.To relax and get out of my daily routine	1	2	3	4	5
7.To express myself creatively and imaginatively	1	2	3	4	5
8.To express myself emotionally	1	2	3	4	5
9.Because it is fun	1	2	3	4	5
10.To be the hero	1	2	3	4	5
11.To be the villain	1	2	3	4	5
12.To feel in control of my decisions and actions	1	2	3	4	5
13.To play as someone else	1	2	3	4	5
14.To follow a story in which I am the protagonist	1	2	3	4	5
15.To create my own story	1	2	3	4	5
16.To explore new worlds	1	2	3	4	5
17.To create new worlds	1	2	3	4	5
18.To fulfil secret desires (things I am unable or not allowed to do in real life)	1	2	3	4	5
19.Playing games allows me to spend time with friends and relatives	1	2	3	4	5
20.To win against competitors	1	2	3	4	5
21.To meet new people	1	2	3	4	5
22.To feel part of a community	1	2	3	4	5
23.To compete as part of a team	1	2	3	4	5
24.Games provide me with the challenges I need/like	1	2	3	4	5
25.It helps to improve my mood	1	2	3	4	5
26.Overcoming a challenge gives me a feeling accomplishment	1	2	3	4	5
27.To improve my gaming character and achieve his/her objectives	1	2	3	4	5
28.To improve my gaming skills	1	2	3	4	5
29.Because it is educational	1	2	3	4	5
30.To improve my problem solving and strategy skills	1	2	3	4	5
31.Playing video games forms part of my lifestyle	1	2	3	4	5
Other reasons? (specify) _____					

SECTION D: • MOTIVES FOR ATTENDING rAge AND EVENT EVALUATION

29a. Do you consider yourself to be a creative person?

Yes	No
Maybe	

29b. If yes/maybe in 29a, how do video games inspire you to be creative? (writing blogs, sketching etc.) _____

30. At what age did you first hear about the rAge Expo in Johannesburg? _____

31. How did you hear about the rAge Expo in Johannesburg?

Facebook	Yes	No
Twitter	Yes	No
Word-of-mouth	Yes	No
Magazines	Yes	No
Radio	Yes	No
Websites (game related)	Yes	No
Computicket's website	Yes	No
Other (specify):	Yes	No

32. Why do you attend the rAge Expo Johannesburg? Please rate the following as reasons.

Strongly agree / Agree / Undecided (Neutral) / Disagree / Strongly disagree					
To relax and escape from my daily routine	1	2	3	4	5
To spend time with relatives and friends	1	2	3	4	5
To socialise and meet people with similar interests	1	2	3	4	5
Attending events like these forms part of my lifestyle	1	2	3	4	5
To demo/test the latest in upcoming games	1	2	3	4	5
To be part of a 'geek' culture	1	2	3	4	5
To test the latest gaming gadgets, gear (VR), PC hardware and consoles	1	2	3	4	5
To be part of the cosplay	1	2	3	4	5
To participate in gaming competitions	1	2	3	4	5
To compete alone against other gamers	1	2	3	4	5
To compete with friends	1	2	3	4	5
To have fun	1	2	3	4	5
To get updated on latest in gaming development	1	2	3	4	5
Because the internet connection is very fast	1	2	3	4	5
Because of the promotions and discounts	1	2	3	4	5
To purchase video game hardware (consoles and PC parts)	1	2	3	4	5
To purchase video games	1	2	3	4	5
To purchase merchandise	1	2	3	4	5
To meet game developers	1	2	3	4	5
To participate in the NAG LAN	1	2	3	4	5
To get 'freebies'	1	2	3	4	5
Because it is the biggest annual video gaming exhibition in South Africa	1	2	3	4	5

Other reasons? (specify) _____

_____

_____

33. Evaluate the expo according to the following aspects.

Strongly agree / Agree / Undecided (Neutral) / Disagree / Strongly disagree					
Ticket sales are easily accessible	1	2	3	4	5
Reasonable ticket prices	1	2	3	4	5
Good number of discounts and promotions	1	2	3	4	5
Good number of 'freebies'	1	2	3	4	5
Good variety of retail shops	1	2	3	4	5
Good variety of demo booths	1	2	3	4	5
Good variety of game developers	1	2	3	4	5
Competitions are well-organised	1	2	3	4	5
The expo is well-organised	1	2	3	4	5
Parking is well-organised	1	2	3	4	5
The venue is comfortable	1	2	3	4	5
Expo staff is well-informed	1	2	3	4	5
Expo staff is friendly and and willing to help	1	2	3	4	5
Signage is visible at the expo	1	2	3	4	5
Information about the expo is readily available	1	2	3	4	5
Prices of snacks and beverages are affordable	1	2	3	4	5
Hygienic ablution facilities	1	2	3	4	5
Enough space to move between checkpoints	1	2	3	4	5
Good internet speed and connection	1	2	3	4	5

34. Will you attend the rAge Expo in Johannesburg again?

Yes	No
Maybe	

35. Any recommendations or suggestions concerning the rAge Expo Johannesburg?

_____

_____

_____

Please provide your email address to stand a chance to win offical rAge merchandise.

_____

TREES tourism research in economic environs & society — twitter @TREESNWU — facebook /TREESNWU

THANK YOU FOR YOUR COOPERATION AND ENJOY THE EXPO! Research done by Tourism Research in Economic Environs and Society (TREES), North-West University, Potchefstroom Campus in collaboration with NAG. Copyright ©2016

Appendix B: Interview guide

SUPPLY-SIDE QUESTIONNAIRE - VIDEO GAMING EVENTS

1. Highest level of education:
2. Career ladder:
(When and where did you start? and how long have you been doing this?)

3. Name of organisation (Anonymous):
4. Job title/description:
5. Name of event (Anonymous):
6. Type of event:
7. Year event was established:
8. Date/s and duration of event:
9. Place and reasons for event location:

10. Target market of event:
11. Average attendance numbers:
12. Main objectives of the event:
(Why host the event?)

13. What do you consider to be the critical success factors when hosting/organising the event?

14. Who are the key role-players/sponsors when organising the event and what role do they play in its success?

Key role-player/sponsors	Role

15. Why is it important to understand target market needs, behaviours and trends?

16. How do you deal with changing market trends? (adaption strategy and respond to feedback)

17. Event SWOT analysis

- **Strengths** (competitive advantage)
- **Weaknesses** (sponsor availability)
- **Threats** (challenges in SA)
- **Opportunities** (expand or future plans)

18. In your opinion, does the event contribute to South Africa's:

- **Game developers?** (elaborate on answer)
- **Video gaming industry?** (elaborate on answer)
- **Gamers/gaming community?** (elaborate on answer)

19. What do you think of the current state of South Africa's video gaming industry? (SWOT analysis aspects)

20. How do you think video gaming events can be used to facilitate tourism?

Appendix C: Proof of language editing

30 October 2018

I, **Ms Cecilia van der Walt,** hereby declare that I took care of the **editing** of the **thesis** of **Mr ZJ Bosch** titled ***Assessing video-gaming events in South Africa: A supply and demand perspective.***

C. Van der Walt

MS CECILIA VAN DER WALT

BA (*Cum Laude*)
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Appendix D: Proof of the transcribing of all audio recordings by transcription services

cyber transcription
Virtual Speech to Text & Copy Typing
Tax No.: 1672677158

C: 083 227 5966
F: 086 647 6813
P: PO Box 7827, Centurion, 0046
E: juliamb1@mweb.co.za

15 October 2018

To whom it may concern:

I hereby confirm that Cyber Transcription Services were responsible for transcribing all audio recordings for ZJ Bosch of North West University, for his thesis; "*Assessing video gaming events in South Africa: A supply and demand perspective.*"

I, Julia Marianne Martinelli of Cyber Transcription, agree to hold any information contained in any audio recording/documents related to this study by ZJ Bosch, in confidence, as well as regarding individuals and institutions involved in the research study.

I understand to violate this agreement would constitute a serious and unethical infringement on the informant's right to privacy.

Sincerely,

Julia M. Martinelli

Cyber Transcription Services