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Visitor segmentation of arts festivals: A comparative study of three events

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SUMMARY

The purpose of this study was to identify tourist profiles as a segmentation variable for three festivals (Innibos, Oppikoppi and Volksblad). Numerous segmentation studies have been done in the past; however, few were done where profiles were used as variables for segmentation of arts festivals. Market segmentation is the way in which tourism companies divide a market into smaller, more clearly defined groups that share similar needs, wants, and characteristics. Segmentation is important in order for a destination to target the right kind of visitor. Other reasons for doing this type of research is to increase the number of new tourist arrivals; to increase the length of stay of tourists; the amount of tourist expenditure per visitor stay and to broaden the activities and shows that are offered.

Research for this study was undertaken at three festivals. These festivals are Innibos, Volksblad and Oppikoppi respectively. Questionnaires were distributed randomly during the course of the festivals. Data collection was done by field workers who distributed questionnaires to the attendants of the festivals. At each of the three festivals questionnaires were interviewer administered and the "recall method" was used, where respondents had to recall their spending. It was also a destination-based survey, where interviews were held on-site during the event. Different sites were chosen to limit response bias towards a certain group of festival attendants. The questionnaires were distributed throughout the course of the three festivals respectively.

The data was used to compile graphs and tables so that a profile of each festival can be designed. Correlations between the three festivals and their profiles were made. In this case the effect size is given by $w= \sqrt{(x^2/n)}$, where x^2 is the usual Chi-square statistic for the contingency table and n is the sample size. In the special case of a 2x2 table, the effect size (w) is given by phi (Φ) coefficient. Note that the effect size is again independent of sample size. Oppikoppi has an

average of 10 000 attendants, Innibos and Volksblad have an average of approximately 30 000 attendants per year. The sample size of 400 questionnaires for Volksblad and 400 questionnaires for Innibos was anticipated and 200 for Oppikoppi.

The variables that were the focus point of this study were gender, occupation, language, province where the attendants reside, travel group size and number of days at festival. This information can contribute to better marketing and more targeted markets for a larger number of attendants. The organiser can determine what type of entertainment, music, song and dance can be packaged and marketed as a unique product. The research indicated that organisers from Volksblad and Innibos can focus more on family entertainment that is suitable for the whole family. Oppikoppi is a rock festival and therefore the organisers can get more rock bands, especially Afrikaans rock. All three festivals are for Afrikaans speaking people so they can use Afrikaans magazines and newspapers as well as Afrikaans radio stations to market these festivals in the province of deliverance as well as bordering provinces.

The study contributes to the information of the larger festivals that already exists like Aardklop, Grahamstown and KKNK.

Key terms: festivals, arts, attractions, marketing, market, tourist, tourism, destination marketing, market segmentation and events.

SAMEVATTING

Die doel van die studie was om 'n profiel van toeriste na drie feeste (Innibos, Oppikoppi en Volksblad) as 'n segmenteringsveranderlike te identifiseer. Verskeie segmenteringstudies is al in die verlede gedoen, maar min hiervan het gekonsentreer op die profiel van die feesgangers as 'n veranderlike van segmentering. Marksegmentering is die manier waardeur toerismebesighede die totale mark in kleiner, meer spesifieke groepe deel wat dieselfde behoeftes en karaktereienskappe het. Segmentering is belangrik om die regte tipe besoekers na 'n bestemming te lok. Ander redes om die tipe navorsing te doen is om die aantal nuwe besoekers te verhoog, die tydperk van hul verblyf te verleng, en die geld wat hulle spandeer te verhoog. 'n Verdere rede is om die aktiwiteite en opvoerings wat aangebied word uit te brei.

Die opnames is uitgevoer by die volgende drie feeste: Innibos, Volksblad en Oppikoppi onderskeidelik. Vraelyste is lukraak versprei gedurende die verloop van die feeste. Vraelyste is versprei deur veldwerkers. By elk van die drie feeste is die vraelyste deur middel van onderhoude voltooi. 'n Bestemmings-gebaseerde opname is gedoen, wat beteken dat vraelyste by spesifieke terreine versprei is. Verskillende areas is gekies om vooroordeel uit te skakel. Die data is gebruik om grafieke en tabelle op te stel sodat 'n profiel van elke fees saamgestel kon word. Korrelasies tussen die drie feeste en hulle profiele is ook gemaak. In dié geval is die effekgrootte gegee as $w = \sqrt{(x^2/n)}$, waar x^2 die gewone Chi-kwadraat statistiek vir die waarskynlikheidstabel en n is die proefgrootte. In 'n spesiale geval van 'n 2x2 tabel, is die effekgrootte (w) gegee deur phi (Φ) koeffisiënt. Let daarop dat die effekgrootte weereens onafhanklik is van die proefgrootte. Oppikoppi het 'n gemiddeld van 10 000 besoekers, Innibos en Volksblad het 'n gemiddeld van om en by 30 000 besoekers per jaar. Die proefgrootte van 400 vraelyste is verwag vir die Volksblad, 400 vir Innibos en 200 vir Oppikoppi.

Die veranderlikes wat die fokuspunt van die studie was sluit in geslag, beroep, taal, provinsies waarvan besoekers afkomstig is, toergroepgrootte en aantal dae by die fees spandeer. Die inligting kan bydra tot beter bemarking en meer geselekteerde markte wat kan lei tot 'n verhoging in besoekersgetalle. Die organiseerders kan bepaal watter tipe vermaak, musiek, sang en dans verpak en bemark as 'n unieke produk. Die organiseerders van Volksblad en Innibos kan op familievermaak fokus. Oppikoppi is 'n rockfees en daarom kan die organiseerders meer sulke groepe kry om op te tree veral Afrikaanse "rock" groepe. Al drie feeste is vir die Afrikaanse mark dus kan bemarking deur middel van Afrikaanse tydskrifte en koerante asook Afrikaanse radiostasies gedoen word in die provinsie van die fees asook aangrensende provinsies.

Die studie dra by tot reeds bestaande literatuur rakende Aardklop, Grahamstad en die KKNK.

Sleutelwoorde: feeste, kuns, attraksies, bemarking, mark, toeris, toerisme, bestemmingsbemarking, marksegmentering en byeenkomste.

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CHAPTER 1

INTRODUCTION AND PROBLEM STATEMENT

1.1 INTRODUCTION

Arts festivals have become important in the South African society because of a growing need among the broader public for various forms of art to accommodate the diversity of cultures that occur within its boarders. Arts festivals are generally important for a number of reasons, namely:

> - to sustain different forms of art;
> - to contribute to the livelihood of artists;
> - to stimulate the growth of regional and local economics;
> - to promote specific destinations; and
> - to create specific images of these destinations, to name but a few (Saayman, Slabbert & Saayman, 2005:7).

Gursoy, Kim and Uysal (2004:172) states that festivals and special events have, in recent years, became one of the fastest growing types of tourism attractions. Therefore, it is not surprising to see that the number of conceptual and empirical studies on festivals and special events have increased rapidly as well (Hughes, 2000:2). Festivals and events have the ability to spread tourism geographically and seasonally. Special events allow a region or community to celebrate its uniqueness, promote itself, develop local pride, and enhance its economic well-being (McIntosh, Goeldner & Ritchie, 1995:157).

Since the dawn of history, festivals and events have been important features of people's lives. Festivals and events evolved as celebrations to mark high points in the Christian calendar, for example saints' days and the like (Van Zyl, 2005: 53).

Currently, at least 211 annual festivals take place in South Africa (Visser, 2005:165). Visser also states that 28% of the 211 festivals focus on performing and visual arts and, more generally on a combination thereof. Since 1995, festivals seem to have taken root in every community in which there had been a need for economic or social wealth identified. Some towns host festivals in order to emphasize their unique character, share their customs, natural environments and local produce with visitors (Kitshoff, 2004:65; Visser, 2005:155). Festivals form part of tourist attractions which are, arguably, the most important component in the tourism system. Tourist attractions are the main reason for tourist trips and form the core of the tourism product. Without attractions there would be no need for other tourism services. Swarbrooke (2002:1) states that tourism as such would not exist if it were not for attractions.

The purpose of this chapter is to clarify the problem, set the objectives and explain the method of research.

1.2 PROBLEM STATEMENT

Market segmentation is the process of separating customers into different groups, or segments, within which customers with similar characteristics have similar needs. By doing this, each one can be targeted and reached with a distinct marketing mix to increase the number of tourists and thus resulting sales (McDonald & Dunbar, 1995:10). This is the way in which tourism companies divide a market into smaller, more clearly defined groups that share similar needs, wants, and characteristics (Lancaster & Reynolds, 1999:8; Kotler, 2003:549; George, 2004:125).

Segmentation is important in order for a destination to target the right kind of visitor. The marketing of events and marketing of tourism offerings has an essential difference, which is that events are usually an annual occasion. This means that marketing must be done successfully, because it only has one chance a year to be successful. Tourism offerings are there to enjoy all year long

with different marketing approaches. Lee, Lee and Wicks (2004:62) emphasise the importance of analysing visitors' motives for attending festivals and events. Identifying such motives is a prerequisite for planning event programs efficiently and market them to visitors. Segmentation can help to assist event and festival planners to do successful marketing for the right target group which will ensure a thriving festival.

One important issue concerning market segmentation is how best to subdivide travel markets (Jang, Morrison & O'Leary, 2002:367). Furthermore, segmentation is important because it can assist the marketing team to target the right segment. With segmentation information the needs and wants of the festival attendants can be specified and attended to.

The following are the benefits of segmenting a market:

> Market segmentation allows marketers to concentrate on consumer needs and wants;
> Market segmentation helps marketers to develop an effective marketing mix;
> Market segmentation enables more efficient market positioning;
> Recognising customers' differences is the key to successful marketing, as it can lead to a closer matching of customers' needs with the products and services of the company;
> Segmentation can lead to niche marketing where applicable. The organisation can meet most or all of the needs of customers in that niche segment;
> Segmentation can lead to concentration of resources in markets where competitive advantages are great and returns are high;
> By means of segmentation a competitive advantage may be gained by having a different approach than to the market competitors;
> By means of segmentation, the organisation can be marketed as a specialist in the selected market segments, with a better comprehension of

customers' needs; thus giving the products/services an advantage to the competitors' products;

> Segmentation promotes new product ideas;

> A long-term relationship can be established with a specific customer group (Bennet & Strydom, 2001:64; Dibb & Simkin, 2001:230; McDonald & Dunbar, 1995:16; Saayman, 2002:85; George, 2004:135; Marx, Van Rooyen, Bosch & Reynders, 1998:535).

The division (segmentation) of the market can be done in various ways. Depending on the situation, a marketer may experiment with a variety of segmentation variables (Burke & Resnick, 1999:41). It involves dividing the market into distinct and homogeneous groups in terms of geographic, socio-demographic, psychographic and/or behavioural characteristics (Slabbert 2002:2). These variables are shown in Table 1.1.

Table 1.1: Variables of segmentation

Variables of segmentation	Definition of variable	Sub-categories
Geographic	Relating to geographical distribution	
Demographic	The study of the structure of human populations	• Gender segment • Income segment • Age and family life cycle
Psychographic	A graphic representation or chart of the personality traits of an individual or group	• Personality • Lifestyle

Social class	A term describing the standing of an individual in the social hierarchy	
Behavioural segmentation	Behavioural segmentation divides the population on grounds of their actions	• Desire for benefits • Purchasing occasions • User status • Attitudes towards offerings • Loyalty • Buyer readiness
Socio-economic	Describes the impact of visitors on the host community and their economy	
Purpose of travel	Motivation for the journey	

(Burke & Resnick, 1999:41; Lubbe, 2000:77; Saayman, 2002:94; George, 2004:126; Kotler & Armstrong, 2004:240; Lamb et al., 2004:168).

From the table above it is clear that there are a number of ways to do segmentation. Although numerous segmentation studies have been done in the past, few were done where profiles were used as variables for segmentation of arts festivals (Chang, 2005:1221). Market segmentation is the way in which tourism companies divide a market into smaller, more clearly defined groups that share similar needs, wants, and characteristics (George, 2004:125). The criteria for market segmentation to differentiate between segments are that the segment should be measurable, accessible, substantial, reliable, durable, competitive, actionable and responsive (Saayman, 2002:90; Kotler & Armstrong, 2004:251, Lamb et al., 2004:166). Other segmentation studies include Diaz-Perez, Bethencourt-Cejas and Alvarez-Gonsalez (2005) for the Canary Islands, and

Fodness & Milner (1992) for a theme park. Mok and Iverson (2000) used *expenditure*, Van Wyk (2004) *personal income*, Galloway (2002) *psychographic segmentation*, Koc and Altinay (2006) *seasonality* in monthly per person spending, Bigne and Andreu (2004), *emotions*, Thrane (1997) used *valuables* and Juaneda and Sastre (1999) *demographics* as variables. Molera and Albaladejo (2006) focused on *rural tourism*, Park *et al.* (2002), *gamblers*. Shaw and Leggat (2003) *country profile*, Weaver and Fennel (1997) *vacation farms*, Holden and Kealy (1996) tour operators, Yilmaz, Zengin and Yildiz (2006), *city parks* and Saayman and Uys (2003) *spectators* at a one day international cricket match and Lee, Lee and Wicks (2004) and Grant and Paliwoda (1998) at *international level*. Saayman, Saayman and Pissoort (2005); and Saayman and Kohrs (2006) studied the *profile of Oppikoppi.*

In South Africa researchers have done studies on the KKNK (Klein Karoo Nasionale Kunstefees), that include Hauptfleisch (2001); Saayman, Saayman and Van Schalkwyk (2003), Saayman, Saayman and Du Toit (2005); Saayman, Slabbert and Saayman (2006) and Silva (1998). A study on the Grahamstown Arts Festival was done by Williams (1997) and Saayman and Slabbert (2005). Saayman *et al.* (2002); Van Zyl and Botha (2003). Saayman, Saayman and Viviers (2004); Saayman and Saayman (2005) and Saayman and Saayman (2006) did studies on Aardklop. However, Visser states in his article that research and published research of festivals in South Africa have been neglected by researchers (2005:160). Snowball and Willis (2006:43) found that detailed information can help organisers to allocate resources more efficiently. If more research were done, then, not only will the target market be determined but the organisers will be enabled to sponsors in order to ensure continuation. Studies at Innibos and Volksblad mainly focussed on the economic value of the festivals and not the profile or segmentation of the tourists although Van Niekerk, Saayman and Saayman did the profile and economic impact of Innibos in 2004, 2005 and 2006.

Snowball and Willis (2006:46) did research on the National Arts Festival and the utility of different attributes of festivals using a choice experiment methodology. This entails that customers are presented with sets of alternative combinations of attributes (or characteristics) of a festival and are asked to choose their most preferred alternative.

Chang (2005:1231) found that tourists visiting aboriginal cultural festivals are somewhat heterogeneous. Therefore, differentiated marketing strategies should be stressed and executed by relevant parties. A number of criteria can serve to segment tourism demand. With regard to the characteristics of tourists, the most relevant criteria are nationality and occupation (Diaz-Perez, Bethedncourt-Cejas & Alvarez-Gonsalez, 2005:963). Segmentation festival markets and understanding their characteristics based on motivations will be important for successful festivals and event managers in the future. Competitive forces will require that managers understand and monitor participants' needs and satisfaction as promoting event features in their marketing strategies (Lee, Lee & Wicks, 2004:69). More festivals are starting to evolve and this brings in more competition for the already existing festivals. Segmentation of festivals will assist in this competitive field to categorise different types of tourists to different festivals. For example the Cultivaria festival in Paarl falls in the same time slot as the Aardklop festival in Potchefstroom, which means tourists need to choose between the two festivals.

Other reasons for doing this type of research is to increase the number of new tourists arrivals; to increase the length of stay of tourists; the amount of tourists expenditure per visitor stay; two other reasons are to broaden the activities and shows that are offered and to the frequency of visitation or repeat visits (Mok & Iverson, 2000:304). Galloway (2002:588) indicates that segmentation of park visitors by reference to the psychological push factor sensation seeking does enable identification of differences between them regarding park-related attitudes and behaviour.

A reason why smaller festivals are neglected from research could be because they don't get that much exposure and are regarded as in the shadow of the bigger festivals like Aardklop, KKNK and Grahamstown. Saayman & Saayman (2004) confirmed that from an economic point of view these festivals make a significant economic injection to the local community.

Numerous segmentation studies have been done in the past; however, few were done where profiles were used as variables for segmentation of arts festivals. The problem that this dissertation will attempt to address is how can one do market segmentation by means of profile variables of visitors to selected arts festivals. These festivals include Volksblad, Innibos and Oppikoppi.

1.3 GOAL AND OBJECTIVES OF THE STUDY

The following goal and objectives guide the study:

1.3.1 Main goal

The main goal is to use visitor profiles as segmentation variables at selected arts festivals in South Africa.

1.3.2 Objectives

Objective 1

- To give a historical overview of events tourism is the first objective of this study.

Objective 2

- To do a thorough assessment of existing literature concerning market segmentation and market segmentation of festivals and events.

Objective 3

- To conduct a survey of selected festivals in South Africa in order to draw up a profile for each and to do a two-way relationship between festivals and different variables.

Objective 4

- To draw conclusions and make recommendations concerning effective segmentation to the various festivals.

1.4 METHOD OF RESEARCH

This study incorporated both an intensive literature survey as well as an empirical study that was facilitated through the use of questionnaires. The literature study was done with the use of specific keywords, namely: *festivals, arts, attractions, marketing, market, tourist, tourism, destination marketing, market segmentation and events.* The internet, including scientific databases such as ScienceDirect and Ebscohost, played a vital role in searching for the most recent, relevant publications and information. Books, journals as well as articles were also used during the literature study.

1.4.1 Research design

The design for drawing a sample consists of defining the population of interest. The survey population for the present study was selected from a group of people attending the respective festivals. The survey was conducted in 2005.

The three festivals are:

1. Innibos that is held annually in Nelspruit during June. This growing festival has been held for the last three years. A very strong Portuguese constituent is also on the horizon, due to the fact that the Lowveld is situated ideally to serve the Mozambican and Gauteng Portuguese-speaking market (Innibos, 2005:1).

2. Oppikoppi that is held in Northam during August has grown from humble and wild beginnings in 1995 to an established household name. This festival has become a leader in the live music and festival industry in South Africa (Oppikoppi, 2005).

3. The Volksblad arts festival takes place annually in Bloemfontein. This festival is structured within a three-tier programme with the official programme highlighting only the artistic component, but according to Joseph (2004:242) the un-programmed activities have been more popular with tourists. In addition to the arts programme, commercial and social programmes are presented.

1.4.2 Data collection

The following section describes the sample population and instrument design. Furthermore it outlines how the data was interpreted and analysed.

1.4.2.1 Sample Population

Oppikoppi has an average of 10 000 attendants, Innibos and Volksblad have an average of approximately 30 000 attendants per year (Oppikoppi information, 2005; Innibos, 2005; Volksbladfees, 2005). The sample size of 400 questionnaires for Volksblad and 400 questionnaires for Innibos was anticipated, and 200 for Oppikoppi. These are applicable to any defined population and state that, for a population of 100 000 the recommended sample size is 384 (Cooper & Emory, 1995:207; Krejcie & Morgan, 1970:608). The questionnaires were conducted at:

Festival A:Oppikoppi (Northam)

Festival B: Volksblad (Bloemfontein)

Festival C: Innibos (Nelspruit).

Data collection was done by field workers who distributed questionnaires to the attendants of the festivals. The research instrument (questionnaire) has been used in similar studies conducted at Arts Festivals in South Africa, for example by Van Heerden (2002) and Saayman and Saayman (2004). As recommended by

Walpole and Goodwin (2000), surveys were conducted amongst tourists to estimate the demand of products and services at arts festivals. At each of the three festivals questionnaires were interviewer-administered and the "recall method" was used, where respondents had to recall their spending. A destination-based survey was undertaken, where interviews were held on-site during the event. Different sites were chosen to limit response bias towards a certain group of festival attendants. The surveys followed a non-probability sampling method, thus respondents were chosen randomly and the survey was distributed over the duration of the festival. 573 reliable questionnaires were collected at Innibos, 201 at Oppikoppi and 452 at Volksblad. The questionnaires were distributed throughout the course of the three festivals respectively. The questionnaires were handed out in increasing increments each day to ensure that the sample population was a true reflection of festival attendants. Day one = 10% of the questionnaires, Day 2 = 20%, Day 3 = 30% of the questionnaires and Day 4 = 40% of the questionnaires were distributed. The reason for this being that at the end of the festival attendants spend more and also to spread the questionnaires so that the researcher would have data of all the days and not just the first day.

1.4.2.2 Instrument design

The research instrument (questionnaire) that was used has been used in similar studies conducted in South Africa at Arts Festivals, for example Van Heerden (2002), Saayman and Saayman (2004) and Van Zyl (2005) to explore the objectives of this study, and was based on previous research done by the North-West University. The variables that were used in the questionnaire were age distribution, language, marital status, occupation, travel group size, nights spent, province of origin, expenditure, type of accommodation used, other festivals attended during the year, transport, attendance of free shows and main reason for visiting the festival. A pilot study was omitted because this type of research has been done in the past with the same questionnaire. These variables were

chosen because it gave sufficient information to draw up a profile of the various festivals.

1.4.2.3 Data analysis

Data analysis was executed utilising the following programs: Microsoft Windows Excel and the SAS statistical package (version 9). The SAS program, which is a statistical package used extensively by academics and for other analyses, was specifically used for the calculations of the relationship between variables. SAS is a world leader in e-Inelegance software and services enabling its customers to turn raw data into usable knowledge. Utilising this same program an ANOVA-analysis (analyses of variance) that measures the variance that exists between groups and Tukey HSD (honestly significantly difference test) calculations were done.

If a profile exists, comparisons can be made to determine whether these three festivals feed the same type of tourist. If this has been determined, comparisons can be made as to how this profile varies (or not) from other established festivals. Furthermore, a two-way relationship was done which can determine if certain variables have a large impact on the festival. A relationship with $w \geq 0.5$ is considered to be practically significant.

1.5 TERMINOLOGY

The following concepts have been used regularly throughout the dissertation:

1.5.1 Attractions

i) Those occurrences, creations or happenings in natural or human-made environments that motivate people to travel (Lubbe, 2003:103).

ii) A person or a thing that attracts or is intended to attract (Oxford Concise Dictionary 2001:89).

A combined definition will thus be: attractive occurrences in natural or human-made environments whose goal is to inspire people to travel.

1.5.2 Visitor attractions

These are features in a place, venue or focus of activities and serve to:

> ➢ Attract visitors/ day visitors from resident or tourist populations, and is managed accordingly;

> ➢ Provide a fun and pleasurable experience and an enjoyable way for customers to spend their leisure time;

> ➢ Provide satisfaction to customers, thus managed as attractions;

> ➢ Provide an appropriate level of facilities and services to meet and cater for the demands, needs, and interests of visitors;

> ➢ Visitor attractions are developed to realise these potentials and may/ may not charge an admission fee (Swarbrooke 2002:4).

1.5.3 Festivals

These are defined as a day or a period set aside for celebration or feasting; an organised series of special events and performances (Oxford Concise Dictionary 2001:530).

1.5.4 Events

i) An event is a phenomenon arising from those non-routine occasions which have leisure, cultural, personal or organisational objectives apart from the normal activity of daily life. The purpose is to enlighten, celebrate, entertain or challenge the experience of a group of people (Shone & Parry, 2004:3).

ii) Events are sometimes referred to as 'special events', which are usually defined according to their scale and size. They usually last for a short term and take place annually. They range from local town events to international sporting

events. Events are also classified according to their purpose, for example cultural, music or religion (George, 2004:366).

In tourism the concept "event" is a short-term happening of which the purpose is to enlighten, celebrate or entertain a group of people.

1.5.5 Market segmentation

i) This is the way in which tourism companies divide a market into smaller, more clearly defined groups that share similar needs, wants, and characteristics (Lancaster & Reynolds, 1999:8; Kotler, 2003:549; George, 2004:125).

ii) Market segmentation is the process of separating customers into different groups, or segments, within which customers with similar characteristics have similar needs. By doing this, each one can be targeted and reached with a distinct marketing mix (McDonald & Dunbar, 1995:10).

1.6 CHAPTER OUTLINE

Chapter one provides the problem statement and method of research. A literature review to understand event tourism will be discussed in chapter two. Chapter three is a literature review on market segmentation of event tourism from previous literature concerning segmentation methods and will explain the importance of market segmentation specifically for tourism and events. Chapter four will follow with the survey results that will be analysed and discussed. The data was used to compile graphs and tables so that a profile of each festival can be designed. Relationships between the three festivals and their profiles were determined. The objective of chapter four is to analyse the data collected and to identify any relationships between the three festivals. Furthermore, the objective is to use this information gathered from the surveys to draw up a tourist profile for each festival. Finally, in chapter five conclusions will be drawn and recommendations made to the festival organisers and also for future studies.

UNDERSTANDING EVENTS TOURISM

2.1 INTRODUCTION

Events, according to Shone and Parry (2004:2), have long played an important role in human society. The tedium of daily life, with its constant toil and effort, was enlightened by events of all kinds. In most societies, the slightest excuse would be found for a celebration. Traditional celebrations often had strict ceremonies and rituals. In Europe, particularly before the industrial revolution, routine daily activities were regularly interspersed with festivals and carnivals. Personal events or local events to celebrate certain times of year, sometimes related to religious holy days, were also common.

Festivals and events have become strong demand generators that play a significant role in, and which make a considerable contribution to, the tourism industry of a country (Arcodia & Robb, 2000:154). The tourism industry has been identified globally as having growth potential. Tourism stakeholders are increasingly turning to this growing industry which is economically beneficial to their region and country (Van Zyl, 2005:51).

The advantages of festivals are that they are firstly an important expression of human activity that contributes much to social and cultural life. Secondly, they are increasingly linked with tourism in order to generate business activity and income for their host communities. The most common type of festival is the arts festival, which can encompass mixed art forms and multiple venues (Allen, O'Toole, Harris & McDonnell, 2005:14). South Africa has experienced a significant increase in the number and size of events both at national and international level. The third advantage of events is that they can create a demand in a time that might be regarded as off-season. Therefore festivals can be regarded as a

marketing tool as well as a generator of income on the other (Saayman & Saayman, 2004:629).

Traditionally, the arts integrated activities such as classical music, opera, theatre, ballet, painting and sculpture. The arts today include a wider collection of activities such as contemporary dance, film, popular music and the various components of the visual arts (Ali-Knight & Robertson, 2004:4).

South Africa, like other developing countries, has realised that the benefits of event tourism can make a contribution to the country – economically as well as socially. Tourists play an important role in the success of any event. Without their attendance there will be no event. Currently, there is a need for an increased use of target market information within the events industry. This will enable the events industry to improve all aspects of decision making and marketing activity planning. In order to gain and sustain competitive advantages, event organisers need to gather, analyse and use information of existing and potential markets. A large proportion of the marketing budgets of events are spent on marketing communication that highlights the importance of this information (Slabbert & Viviers, 2005:1).

The aim of this chapter is to give an overview of the history of event tourism. This will be achieved by defining festivals and events and by discussing the distribution of South African festivals. A tourism timeline will be compiled. This will give a perspective of how tourism has developed over time and it will indicate the importance of tourism to a country as well as the role that events and festivals can play.

2.2 WHAT EVENT TOURISM ENTAILS

Pina and Delfa (2004) found that tourism as a rural growth tool has to adapt to current market mechanisms, which are becoming extremely competitive and

which are dominated by communication and promotion techniques. Thus, there is a need for information about the tourists visiting such areas.

From a marketing point of view, the tourism market consists of potential tourists who have specific needs and who are prepared to spend money on a unique experience. Market segmentation is used to trace these potential tourists and to cater for their specific needs (Saayman, 2002:62). The word *market* in tourism refers to a group of consumers (actual or potential) with similar needs or wants (George, 2004:124).

The definition of festivals or special events, according to Shone and Parry (2004:3), is a phenomenon arising from those non-routine occasions which have leisure, cultural, personal or organisational objectives set apart from the normal daily life activities. The purpose of these occasions is to enlighten, celebrate, entertain or challenge the experiences of a group of people.

Inskeep (1991:88) states that special events, such as sports contests, fairs and expositions can be major tourist attractions for short periods of time. Arts festivals can be added to these examples. These festivals are organised with the purpose of attracting tourists and also for reasons such as national or regional prestige and gaining new facility complexes for permanent use, perhaps along with concomitant redevelopment of urban districts.

Gursoy, Kim and Uysal (2004:172) say festivals and special events have become one of the fastest growing types of tourism attractions in recent years. Therefore, it is not surprising to see that the number of conceptual and empirical studies on festivals and special events have been increasing rapidly (Hughes 2000:2).

Festivals, celebrations and other "cultural performances" are rich in meaning and provide a "text" by which much can be learned of the host culture and community. Celebration is public, with no social exclusion, is entertainment for the fun of it, and is participatory – actively involving the celebrant who takes time out of the

ordinary routine, and "does so openly, intentionally and with the general aim of aesthetic, sensual and social gratification" (Saayman, 2001:121).

The terms *festivals* and *events* can be quite confusing, seeing that literature implies a similarity between the two. This can be attributed to the relatively young nature of the emerging industry and the limited literature available in the field (Arcodia & Robb, 2000:155). Adding to this confusion, most of the literature sources available describe international research. In addition, the terms used in current literature have not been standardised, making it difficult to translate them to a South African context (Van Zyl, 2005:51). Figure 2.1 indicates the difference between festivals and events.

FESTIVALS
- Community celebration
- Community entertainment
- Arts and cultural celebration
- Historical commemoration
- Annual event

EVENTS
- Mega events
- Major events
- Hallmark events
- Special events
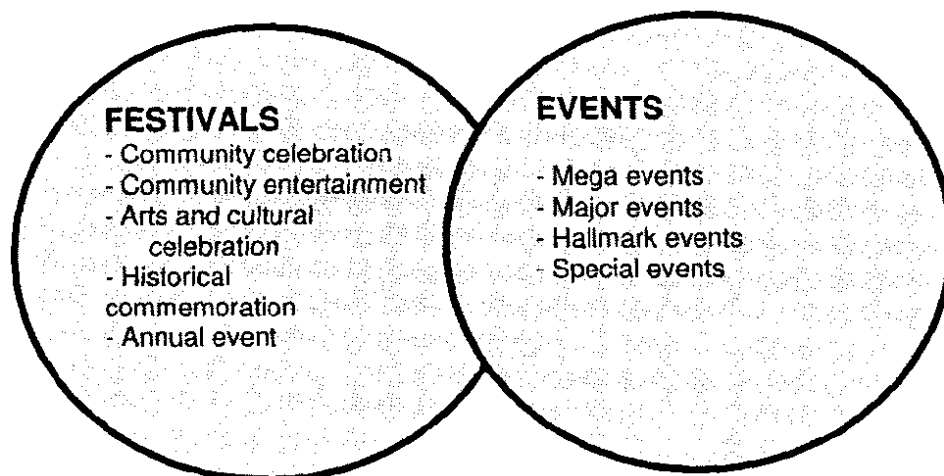
Figure 2.1: A categorisation of the two terms, festivals and events (Van Zyl, 2005:52)

The main difference between the two terms relates the time that they take place (Van Zyl, 2005:52). Festivals are held annually, whereas events are once-off activities.

Lubbe (2003:105) states that attractions are divided in two subgroups. The first is natural attractions and the other is human-made attractions. The latter includes events of a less static nature, such as important sporting events, musical and arts festivals, exhibitions and shows (e.g. the Olympic Games or events synonymous with a specific destination. Examples of these are the KKNK held annually in

Oudtshoorn, South Africa and Aardklop, an annual festival held in Potchefstroom, South Africa).

A specific awareness of the impact of events on wealth creation and the economy exists in South Africa. Therefore, it has become vital that more emphasis should be placed on how one can be empowered to organise these events (Saayman, 2001:109). The following section will show the distribution of South African festivals.

2.3 THE DISTRIBUTION OF SOUTH AFRICAN FESTIVALS

In the previous section, the terms festivals and events were defined. The distribution of South African festivals is illustrated in Figure 2.2. The distribution of festivals within the provinces varies significantly. Irrespective of size, most urban centres in the Free State, Northern Cape; Eastern Cape and North West host annual festivals. However, in Mpumalanga the five annual festivals are hosted in only four urban centres. Not only the geographical distribution of South African festivals but also their temporal pattern is diverse. Visser's (2005:167) research shows clearly that festivals generally take place in the second half of the year. There are two main festival periods. The first is from the end of March to the beginning of April during the Easter Holiday period, whereas the second main festival period is from late September to early October.

Many local festivals originally designed to entertain local residents have grown to attract visitors from many kilometers away (McIntosh, Goeldner & Ritchie, 1995:156).
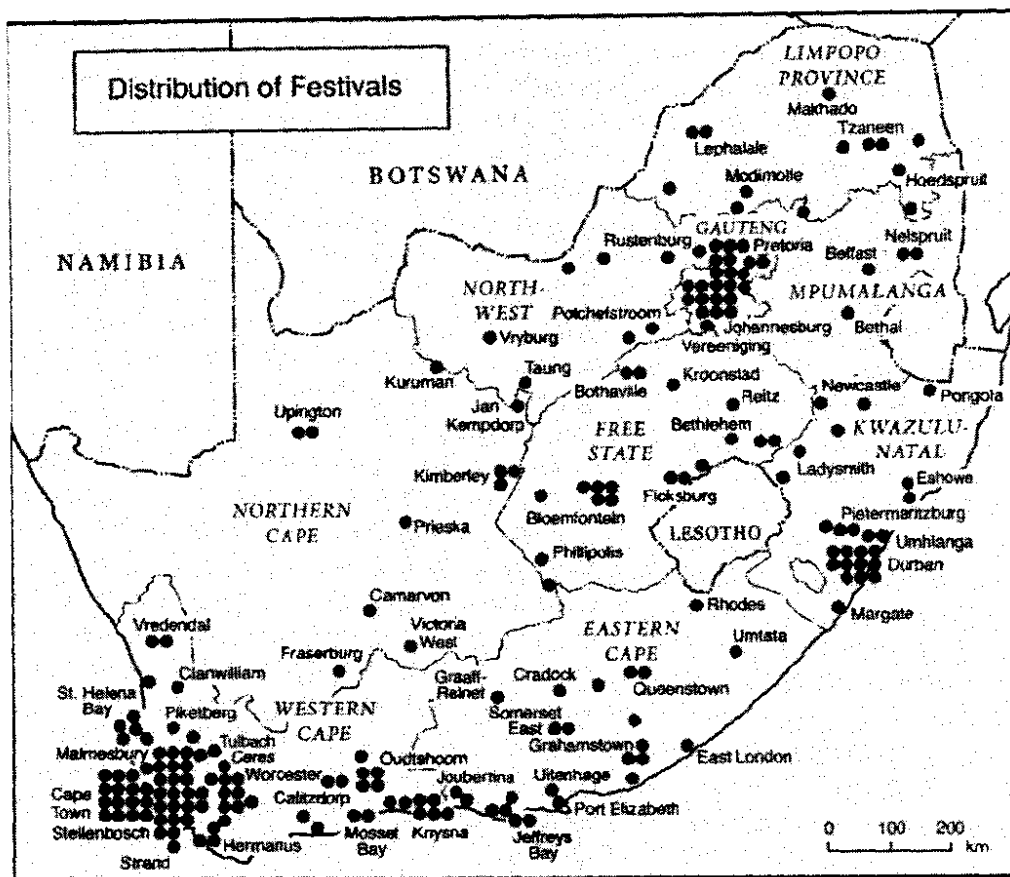
Figure 2.2: Spatial distribution of festivals in South Africa (Visser, 2005: 166)

Figure 2.3 indicates where tourism and the arts meet. Festival attendants can be described as local (living in the town where the festival takes place) or non-local (those who do not stay in the host town). Non-local attendants are divided in two categories, namely day visitors and tourists. Day visitors stay for less than 24 hours and tourists stay for longer than 24 hours. Overnight tourists are holiday and non-holiday visitors. Holiday visitors will primarily attend the festival, while non-holiday visitors are mostly business travellers. The services tourists will use during their vacation include entertainment, transport, attractions, accommodation and catering (Saayman, 2001:114). Tourism and arts meet with attractions and, mainly, the entertainment aspect of tourism.
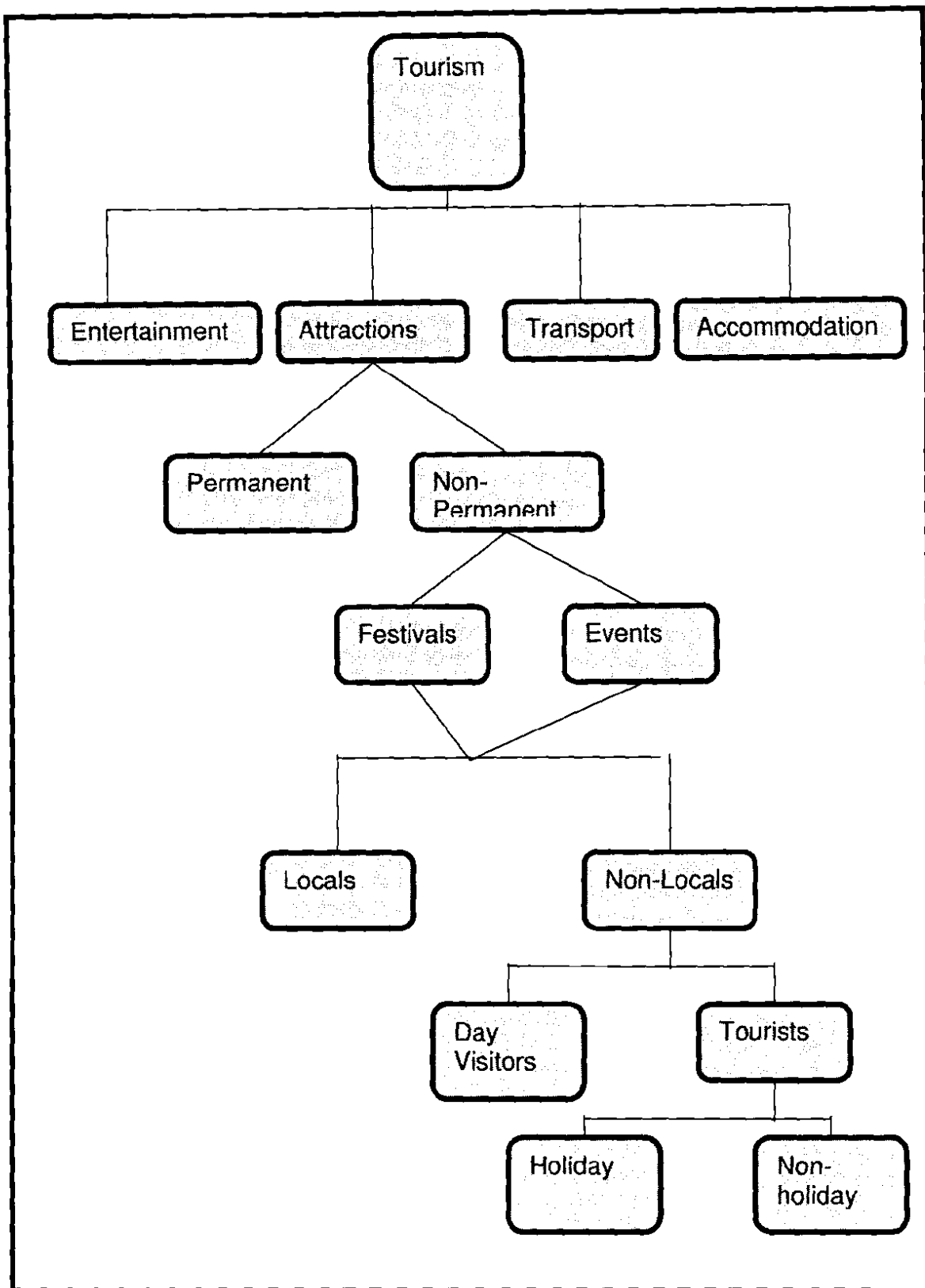
Figure 2.3: Tourism and the arts (Hughes, 2000:3; Saayman, 2000:10)

Cultural events of urban areas can attract large numbers of tourists. The existing infrastructure may have sufficient carrying capacity for visitors, or the capacity may, if necessary, be expanded in ways that will also benefit the local population (Saayman, 2001:114).

The success of a tourist destination depends on the regular arrival of large numbers of visitors, and the impact of their activities during their stay there. The flow of tourists to a destination is determined by several factors. These include, amongst others, the accessibility of the destination, the cost of visits, and how aware potential visitors are of the attractions and amenities thereof (Laws, 1995:7). Where festivals are involved, the host community can be certain that tourists will return year after year if they have been satisfied and if the marketing is sufficiently impressive to attract more tourists.

Carrying capacity is essential to environment protection and sustainable development. This refers to the maximum use of any site without causing negative effects on the resources, nor reducing visitor satisfaction, nor exerting unfavourable impact upon the society, economy and culture of the area (Saayman, 2001:113).

2.4 ARTS FESTIVALS AND EVENTS

According to the above section, events and festivals are part of the history of tourism. This section will explain the history of arts festivals and events.

Festivals are unique travel attractions because they do not rely upon expensive physical development. Rather, the success of festivals and special events is more dependent upon the enthusiasm of the local community and event organisers than upon unique natural or built attractions. Most importantly, small events require minimal capital development and use the existing infrastructure to their advantage. Generally, they are volunteer intensive and locally controlled.

However, they have the potential of generating substantial returns on small financial investments (Gursoy, Kim & Uysal, 2004:171).

The most basic goals of event tourism are the creation of tourist attractions and the capability of generating travel demand, or satisfying needs (such as relaxation, curiosity and so much more) (Lubbe, 2003:111). Saayman (2001:115) says people attend festivals for different reasons. Some might want to learn, while others might want to belong or even share in the experience. People need events and festivals for leisure. People need to socialise, to meet other people, to relax, to entertain and be entertained. People need to compete in order to learn and experience new things and, lastly, people need to escape.

The tourism sector is subdivided into a number of sectors of which one is events. This sector is young and growing by the day (Slabbert & Viviers, 2005:1). Characteristics of events are the following:

> unique;
> perishable;
> ambience and service;
> labour-intensive;
> fixed timescale;
> intangible;
> ritual and ceremony;
> personal interaction (Shone & Parry, 2004:13)

These characteristics can be seen in the festivals that will be discussed and they can be used in the marketing strategies of these festivals in order to get a competitive advantage.

Festivals, in essence, are an indispensable feature of cultural tourism. Therefore, festivals have frequently been labelled as cultural events. Festival tourism usually refers to events and gatherings that are staged outside the normal program of activities (Chang, 2005:1224).

Since the dawn of history, festivals and events have been important features of people's lives. Festivals and events evolved as celebrations to mark special days in the Christian calendar, an example being saints' days and the like (Van Zyl, 2005: 53). Looking back in history, it can be seen that events have always had a significant role to play in society, either to break up the dull, grinding routine of daily life or to emphasise some important activity or person (Shone & Parry, 2004:6).

Thus, these festivals furnished in one unique package the spectrum of attractions that have drawn tourists of all times and places to experience the feeling of being part of a great event. At this event they could enjoy a special occurrence and be part of a gay, festive mood, punctuated by exalted religious moments and elaborate pageantry. They could experience the excitement of contests among performers of the highest calibre and, to top all this, they had a chance to wander among famous buildings and works of art (Goeldner & Ritchie, 2006:45).

Handel (whose centenary was commemorated in 1784) could be regarded as the father of all arts festivals, as no other composer ever stimulated so much musical homage and devotion (Van Zyl, 2005:53). In the eleven days from May 26 through June 5 1784, a group of some 500 singers and players led by Joah Bates (1740-1799) presented a series of five concerts devoted to the music of George Frideric Handel. Under the patronage of King George III and a very distinguished group of directors, English music-lovers were treated to a music festival of unprecedented size, one which proved to be the ancestor of the immense (1000 or more performers) festivals presented in London's Crystal Palace during the reign of Queen Victoria (Maryland Handel Festival, 1984:1).

Handel was regarded as the father of all arts festivals and the Mozart festival followed in its footsteps. The Vermont Mozart Festival is a popular series of indoor and outdoor concerts presented annually at sites throughout the state of Vermont. The inaugural Festival of 1974 was conceived as a celebration of both

the natural beauty of the state and the genius of the Festival's namesake, composer Wolfgang Amadeus Mozart. The Festival's mission grew quickly, and since its third season it has featured a much wider range of classical performances (Hill, 1998:1).

Arts festivals have been held in English towns since the founding of the Three Choirs festival in 1713. Most modern festivals, however, began after the Second World War. The Ludlow Festival was founded in 1960 as an outcome of efforts to raise funds for the restoration of St. Laurence's Church. The Inner Bailey of the castle was an obvious and splendid choice of venue for staging plays. The highlight of the festival was always the performance of one of Shakespeare's plays. This festival also included musical events in St.Laurence's Church, tours of local sights, arts and photography exhibitions and, in recent years, a lively and irreverent fringe (Ludlow festival, 2006).

However, the majority of music festivals have been held since the 1960's, of which the Woodstock Festival in Cape Town, South Africa was one of the best-known. Globally, the festival and event industry emerged during the 1980's and 1990's (Van Zyl, 2005:53).

The 1980's saw an explosion of municipal government-backed arts and cultural-based projects. This process began throughout the western world from the 1960's onward, and can be seen as indicative of a change from the manufacturing industry to service industry as part of the emergence of a *post-industrial* western world. In the 1980's, central government took many powers of the local government within Europe. The concept of cultural regeneration was born into an increasingly large array of cash-strapped local public sector *families*. Faced with a new form of living in an environment with less commercial activity (especially at those places with a history of strong reliance on the manufacturing industry and with a population with reduced spending potential), the apparent

opportunity of cultural tourism was, for many, irresistible (Ali-Knight & Robertson, 2004:11).

Events management can be thought of as an art, rather than a science. Historically, the organisation of small local events was relatively uncomplicated and needed no extensive managerial expertise (Shone & Parry, 2004:6).

Wealthy people have always travelled to distant parts of the world to see great buildings or other works of art, to learn new languages, to experience new cultures, or to taste new cuisine. As long ago as the time of the Roman Republic, places such as Baiae were popular coastal resorts for the rich (Anon, 2006).

2.5 HISTORICAL COURSE OF TOURISM

Before the history of events can be discussed, the tourism time line needs to be addressed. Figure 2.4 depicts the history of tourism and all the important events that had an influence on the growth of tourism.

2.5.1 Development of tourism

Travel is not a modern phenomenon. For centuries people have been travelling the globe to be educated elsewhere, to undertake pilgrimages, to trade or for adventure. The above timeline depicts the key eras and events in the development of tourism. The abbreviations BCE (Before the Common Era) and CE (in the Common Era) for the left-hand (before the year zero in the common calendar) and right-hand (after the year zero in the common calendar) will respectively be used in the time line (Lubbe, 2003:15).

The first urge to travel arose from the ancient human needs for trade and commerce. The development of trade by early civilisations (BCE) marked the beginnings of the modern era of travel.

> ➤ The first travellers were nomads that moved around for food, water and shelter. Fossils found in Western Europe, Africa, China and Java proved that these early people had great endurance and they often had to travel

under difficult circumstances, far from their homes. These journeys were mainly on foot and they had no protection against the elements, robberies and assaults; the discovery of money and the development of transport, in approximately 400 BCE, together with the discovery of the wheel, resulted in travelling becoming easier (Saayman, 2000:43);

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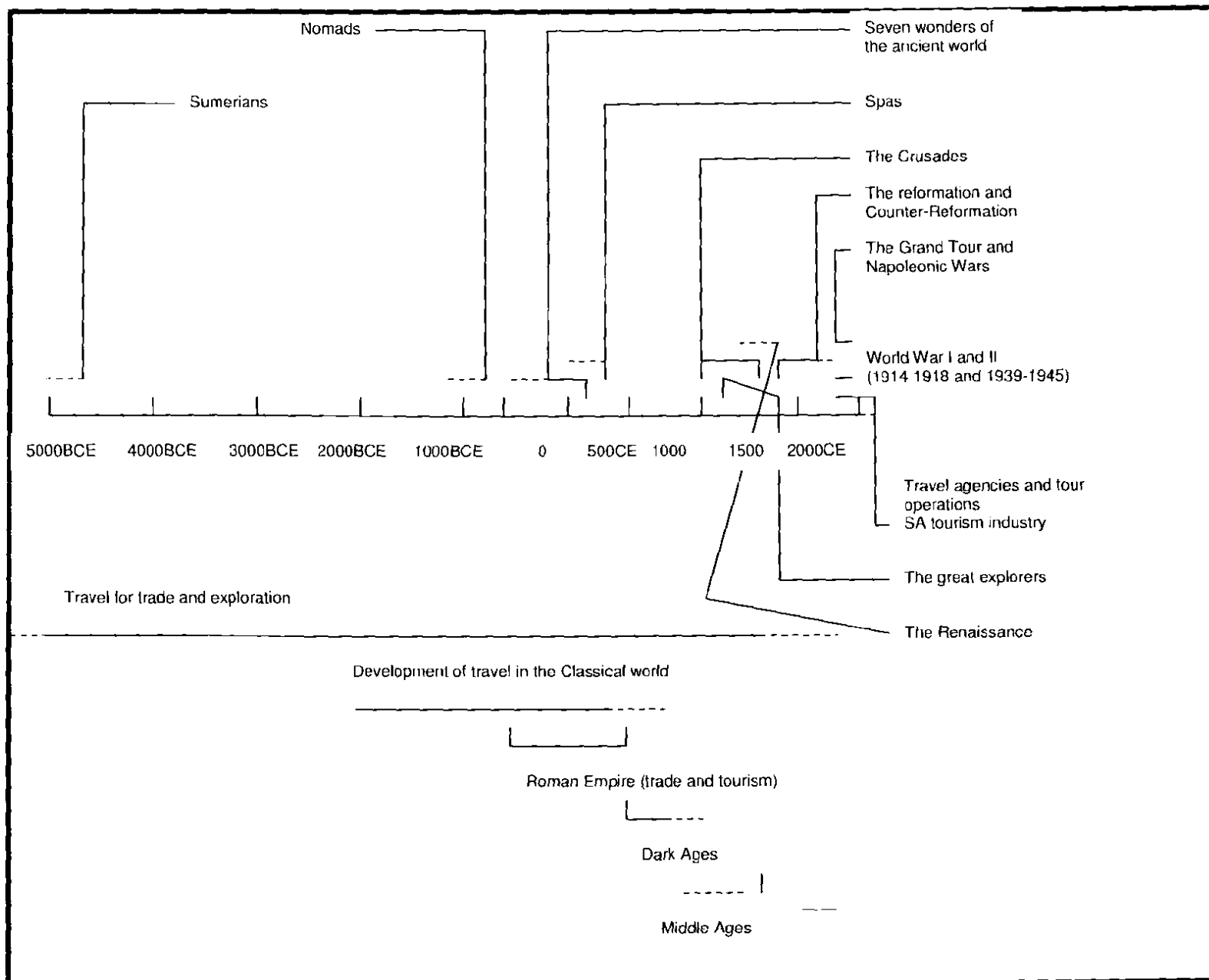
Figure 2.4: Tourism time line (Adapted: Lubbe, 2003:12)

> The Sumerians invented the wheel, money and cuneiform writing. This enabled them to transport themselves, to pay for goods and accommodation, to communicate and to record information. The invention of the wheel accompanied the invention of the wagon and this created a need for roads. Evidence of trade between the Egyptians and the Sumerians dates back to the 5th millennium BCE (Lubbe, 2003:15);

> The Phoenicians were also well known for their extensive trade relations. In later years (CE), great explorers added much to people's knowledge about unknown places:

- In 1271-1295 Marco Polo, a Venetian merchant, visited Persia, Tibet, Burma, India, Java and the Siberian Arctic (amongst other places).

- From 1492 to 1502 Christopher Columbus explored the New World and the northern coast of South America.

- In the year 1519 Ferdinand Magellan from Spain sailed west to circumnavigate the globe. He was killed in the Philippines, but some of his crew completed the journey. He named the Pacific Ocean and the Straits of Magellan.

- During years 1768-1808 James Cook, an English naval captain, explored the north-eastern coast on North America and the Pacific, discovering Caledonia, New Zealand, Australia and Hawaii (Lubbe, 2003:15, Hitrec, 2006:2).

2.5.2 The Classical world

The Classical world refers to the ancient Greek and Roman civilization (The 'ancient world' – for Europeans – generally describes all those countries in Europe, the Middle East and Africa – bordering the Mediterranean – that have affected and shaped European civilization). All these countries experienced notable growth in travel from approximately 2000 BCE to CE 500. Apart from travelling for commerce and trade, war, medical treatment and education, people

travelled for the following reasons during this very long period of European history:

> Athletics competitions – Several athletics meetings were held in honour of different gods in Ancient Greece and Rome. The Olympic Games, for example, were held in honour of the god Zeus (Lubbe, 2003:15). As early as in 776 BCE, citizens of the city-states assembled every four years to honour Zeus by means of athletics competitions. Four national festivals emerged namely, the Olympic Games, Pythian Games, Istmian Games, and Nemean Games. Each festival included sacrifice and prayer to a single god. The deity was honoured by offering a superlative athletic or artistic performance (Goeldner & Ritchie, 2006:45);

> Religion – People visited the sanctuaries of the healing gods (normally in beautiful settings with pure air and mineral water) and the oracles who worked there to seek advice from them. An example of such a shrine is the great Romano-Celtic hot-water shrine of Bath, in the west of England, which was visited for centuries by people from all over the Roman world. In the millennia before BCE, the pharaohs started using the building stones in the Nile valley to construct elaborate burial tombs and pyramids, such as the step pyramid of Djoser, the Sphinx, the three great pyramids at Giseh, and the pyramid complex at Abusir. These incredible outdoor wonders can be regarded as one of the first 'tourist attractions'. Although there was a spiritual motivation attached to visiting these destinations, the main motivation was enjoyment;

> Pleasure - Herodotus, Greece's 'Father of History', travelled extensively for both business and pleasure. In 334 BCE, Alexander the Great installed a democratic government in Ephesus (now Turkey). Ephesus began to experience an influx of 700 000 tourists per season – all flocking to be entertained by acrobats, animal acts, magicians, jugglers and prostitutes.

> New developments – Travellers visited Athens (which became a tourist attraction in the second half of the 5th century BCE) to view the Parthenon and other new buildings on the Acropolis;

> Museums – These started with the Greeks, and were stocked with gratification offerings and goods offered in bribery, for example, gold mixing bowls, marble sculptures and paintings from all over.

It was during the Classical period, in the 2nd century BCE that a Greek man named Antipater listed the seven marvels of arts and buildings, which became known as the Seven Wonders of the Ancient World (Lubbe, 2003:15). Hudman (1980) as quoted by Saayman (2000:44) says this period was called the Antique period.

2.5.3 Kingdom/Empire period

This period is characterised by the rising of a number of kingdoms/empires that contributed to the improvement of transport systems and accommodation facilities to ultimately make provision for the increasing number of travellers. It was, in other words, the beginning of the development of infrastructure like roads, bridges and distinct travel (Hudman, 1980).

2.5.3.1 The Egyptians

As the kingdoms/empires developed, journeys for official purposes became increasingly important. Journeys were mainly undertaken to establish communication between the central government and its territories.

As a result of this increase in journeys, the development of accommodation and inns, that can be regarded as the forerunner of our modern hotels/motels and restaurants, became obvious.

During this period certain aspects of real tourism began to develop, like journeys for pleasure and with a view to religious festivals. Temples, tombs and monuments attracted thousands of people. The selling of souvenirs was established as well as the possibility of bargains for family and friends (Saayman, 2000:53).

2.5.3.2 Assyrians and Persians

Before the Assyrian Kingdom developed, there had been apparently no development of a transport system. Transport and travel, however, increased and the infrastructure within the Assyrians Kingdom, especially on military territory, enhanced considerably.

Roads that led to economic, political and military points were paved and stone bridges were built over strategic rivers. The use of horses made travel during this period much easier.

The Persians, like the Assyrians, emphasised the improvement of the transport structure within the Kingdom. Roads built by the Assyrians were improved and new kinds of wagons were designed. This included the classic four-wheel vehicle for the more wealthy people.

2.5.3.3 Greeks

The Greeks became the most important traders of their time and explored the yet unknown worlds of the Near East and parts of Africa. The most important mode of transport was by water. During this time infrastructure rather than routes, developed. In addition, the Greeks began with a service that is still a key factor in tourism today, namely tour guides.

2.5.3.4 Roman Empire

The Roman Empire formed part of the Classical world and was at the peak of its power between the last 200 years before Christ (BCE) and CE 476. The empire at its peak was stable and flourishing, and these conditions brought about increased travelling, both within the empire and beyond its borders (Lubbe, 2003:15).

A first-rate road infrastructure made frequent and extensive travelling easy. By CE 117, the Roman Empire had a network of 80 000 km of road (Lubbe, 2003:15, Hitrec, 2006:1).

The climax of tourism in early history was achieved during the Roman era. It was safe to travel and four factors, especially, encouraged improved journeys:

- The Roman currency was the only monetary unit that the traveller needed.
- A well-planned network of roads and waterways.
- Greek and Latin were the official and business languages.
- The legal system (the so-called Pax Roman) offered protection against foreign authority or custom (Saayman, 2000:54).

The Romans also had their tourist attractions: thousands of visitors would annually cross the Alps or travel to the countryside and to spas and seaside resorts during the summer months (for health and recreational reasons) (Lubbe, 2003:15).

People also made pilgrimages to ancient places of worship; for example, women from all over the empire flocked to the temples of Isis, their most popular goddess. When travellers arrived at their destination, they would be met by guides offering services, or else they would use guide books. There were also inns along the main routes and at the main centres (Lubbe, 2003:15).

Travelling was seen as part of education, and young men would often leave their homes to complete their education elsewhere. This was called the Grand Tour and will be explained at a later stage of this chapter.

The greatest motivation for travelling was the events of the great ancient Roman and Grecian festivals. For these religious games (for example, the Olympics) and political assemblies, all hostility would be suspended and everyone could travel in safety. This allowed the organisers to arrange massive fairs, and visitors from

many countries bought merchandise. Theatrical productions were also popular (Lubbe, 2003:15).

It is thus clear that the modern tourism industry was settled during this period of Roman sovereignty in the then known civilised world of the West (Saayman, 2000:55).

2.5.4 The decline and revival period

2.5.4.1 Middle ages

The Dark Ages (from the fall of the Western Roman Empire in the 5th century to approximately the 10th century CE) were characterised by numerous barbarian invasions which left trade and city life severely reduced. On land, travellers worried about bad roads, terrible inns and highwaymen, while at sea storms and pirates were a danger to life and limb. Travel was therefore extremely dangerous during the Dark Ages because the political and civil stability and affluence of the old Roman Empire had all but disappeared in many places. Only the most adventurous or desperate people travelled in the Dark Ages (Lubbe, 2003:15; Hitrec, 2006:1).

During the Dark Ages, despite hardships and dangers, many pilgrims still travelled to visit hallowed sites, to atone for their sins, or to fulfil promises made while they had been ill. The beginning of the Middle Ages (which lasted in Europe from about the 10th century and eventually overlapped with the beginning of the Renaissance) saw an easing of the harsh conditions of the Dark Ages (Lubbe, 2003:15).

Political and economic structures were destroyed after the fall of the Roman Empire. The middle class was on the decline, with the result that trade decreased. People left the cities and returned to rural areas. Tourism was virtually non-existent (Saayman, 2000:55).

It was during the Middle Ages, for example, that the Crusades took place over a period of centuries. The Crusades were frequent military campaigns of Europeans in order to recapture the Christian shrines of the Holy Land from the Muslims who, by that time, had been well entrenched in that part of the world. During the Middle Ages, Vikings travelled throughout the Western world, as did the Normans. The Arabs had also established a powerful empire between 1000 and 1500 CE. They travelled extensively for official business, pilgrimages and commercial purposes (Lubbe, 2003:15).

The history of European tourism can be said to have originated with the medieval pilgrimage. Although undertaken primarily for religious reasons, the pilgrims in the Canterbury Tales quite clearly saw the experience as a kind of holiday (the term itself being derived from the words 'holy day' and its associated leisure activities). Pilgrimages created a variety of tourist aspects that still exist - bringing back souvenirs, obtaining credit with foreign banks (in medieval times utilising international networks established by Jews and Lombards) and making use of space available on existing forms of transport (such as the use of medieval English wine ships bound for Vigo by pilgrims to Santiago De Compostela). Pilgrimages of one or another kind are still important in modern tourism - such as to Lourdes or Knock in Ireland. There are also modern equivalents travelling to Graceland and the grave of Jim Morrison in Pere Lachaise Cemetery (Anon, 2006).

2.5.4.2 Middle age cities

The revival of cities during this period coincided with the growth in the trade and the manufacturing industry. This renewal was mainly the result of the abolition of slavery, the immigration to growing industrial areas to become artisans, and in some cases, to become wealthy. The growing middle class once again gave rise to the development of the necessary tourism. This growth in the number of journeys, cities and the middle class laid the foundation for the Renaissance (Saayman, 2000:56).

2.5.4.3 Renaissance

The Renaissance (which means 'rebirth') was a brief period of about two centuries from the Late Middle Ages to the time of Reformation. This period was characterised by increased freedom, creativity and the blossoming of music, art and architecture (Lubbe, 2003:15).

Characteristic of the Renaissance is the change from a relative static culture to a dynamic culture. A community based on feudal, pastoral and monastery ideas, was replaced by individualism and urbanisation. The growing trade between East and West revived travel possibilities during this period.

Although pilgrimages were still undertaken, they began to decrease as a result of the rise of Protestantism during this period. The Reformation of the 16th century signalled the birth of Protestantism, with Martin Luther nailing his 90 Thesis to the door at Gutenberg Cathedral. His fundamental message was that salvation does not come from works, but by faith alone. Although it was fiercely resisted by the Catholic Church, the Reformation spread like wildfire through many countries in Europe. In doing so, it dealt a body blow to the rigidity, exclusivity, power Catholic-Protestant rift. It split European consciousness in a disastrous way and gave rise to centuries of warfare, civil strife, and prosecution (Lubbe, 2003:15).

2.5.5 The grand tour

In the course of the sixteenth century, it became fashionable in England to undertake a Grand Tour. The sons of the nobility and gentry were sent upon an extended tour of Europe as an educational experience. The eighteenth century was the golden age of the Grand Tour and many of the fashionable visitors to Rome were painted by Pompeo Batoni. The modern equivalent of the Grand Tour is the phenomenon of the backpacker. Cultural holidays, such as those offered by Swann-Hellenic, are also comparable (Lubbe, 2003:17; Anon, 2006; Grand Tour, 2006:3; Hitrec, 2006:2).

The Grand Tour was radically curtailed by the French Revolution and then the Napoleonic Wars. The establishment of local universities made the education provided by the Grand Tour redundant (Lubbe, 2003:17).

2.5.6 Transition period

The changes from a rural society to an urban society completely transformed lifestyles and characteristics. Tourism in this era was characterised firstly by the middle class masses that flocked to resorts in mountains and seaside areas close to their urban centres for short periods and secondly by the visitation of wealthy tourists to exotic places for extended times (Saayman, 2000:57).

2.5.7 The development of spas, baths and seaside resorts

This section will give the history of spas, baths and seaside resorts. It will also give an indication of how the development of spas, baths and seaside resorts boosted tourism.

2.5.7.1 Spas

The development of spas also helped to develop tourism. The Romans were the first to use spas extensively. After the collapse of the Roman Empire, spas only became popular again in the 18th century. They were then used by the wealthy, who visited them for their medicinal value as well as for the entertainment industry that had developed around them, offering social events, games, gambling and dancing (Lubbe, 2003:15; Agarwal, 2002:26).

2.5.7.2 Seaside resorts

Today, millions of people flock to the beach every holiday. By 1861, this phenomenon was already under way, with successful seaside resorts in Britain such as Brighton, Ramsgate, Margate and Scarborough. Some people believed that saltwater treatment was more beneficial than that of spas and would rather visit the seaside resorts. This movement towards seaside holidays led to a

growing demand for holiday travel, especially for the wealthier classes (Lubbe, 2003:15).

Initially spas and seaside resorts were visited for their medicinal and therapeutic value. Later, however, they attracted the sick and healthy alike, and were known as centres of entertainment, recreation and gambling – just like the spas.

Health tourism had always existed, but it was not until the eighteenth century that it became important. In England, it was associated with spas, places with supposedly health-giving mineral waters, treating diseases from gout to liver disorders and bronchitis. Bath was the most fashionable resort, but Buxton, Harrogate, and Tunbridge Wells, amongst others, also flourished. People visited these places for the balls and other entertainment, just as much as for 'the waters'. By the nineteenth century continental spas such as Karlsbad attracted many fashionable travellers (Anon, 2006:3).

It could be argued that Britain was the home of the seaside holiday. By travelling to the coast, the population was following in the steps of Royalty. King George III made regular visits to Weymouth when in poor health. At the time, a number of doctors argued the benefits of bathing in sea water. Sea bathing as a widespread practice was popularised by the Prince Regent (later George IV), who frequented visited Brighton for this purpose (Anon, 2006:4).

This era of tourism illustrates the important fact that it is usually a combination of factors, rather than one single element that determines the success or failure of an enterprise.

2.5.8 Wars and tourism

Wars definitely influenced tourism – often positively. At the close of the 19th Century and up to the outbreak of World War I in 1914, the tourist movement had assumed considerable dimensions and surpassed anything of its kind ever known in the history of the human race – it developed into a world phenomenon.

It is clear that even before World War I, tourism was considered to be a developed industry. The war played its part in developing it even more (Lubbe, 2003:15).

World War I changed tourism from being something for the elite to an activity in which all could engage. This was caused by the following changes:

> Economic;
> Psychological;
> Social;
> Political.

World War II also influenced tourism. Extensive domestic travel became common for the armed forces, thus forcing them to see more of their own country. Many soldiers were sent to fight in foreign countries and saw what these destinations had to offer. Worldwide communication and transportation also developed because of the war (Lubbe, 2003:15).

This enforced interaction between people as the result of the war and awakened a universal awareness of other people and their surroundings. More leisure time became available as a result of shorter working hours. During the sixties paid vacations became all the more common.

2.5.9 Modern period

The modern era includes all the characteristics common to previous periods of tourism as well as adding its own character, such as merchandising of tourism on a large scale and a broader economic base of tourists.

Wealth as a prerequisite for tourism is as valid today as always. Mass tourism is presently mainly associated with progressive countries and the wealthy from the Third World (Saayman, 2000:58).

2.5.10 The development of travel agents and tour operators

➢ In 1822, Robert Smart of Bristol, England became the first steamship agent, booking passengers on steamers to ports in the Bristol Channel, and to Dublin in Ireland;

➢ In 1841, Thomas Cook became the first rail excursion agent. He started by running a 12-mile excursion train trip between Leicester and Loughborough (England). This could accommodate 570 passengers at a shilling each. Thomas Cook later pioneered the concept of packaged tourism, an area which he dominated until World War II. His company organised itineraries that included transportation, accommodation and banking services;

➢ Thomas Bennet became the first specialist in individual inclusive travel. In 1850, he set up a sideline business as 'trip organiser' providing tourists with itineraries, provision carriages, a travelling kit, accommodation and horses;

➢ In 1850, the American Express Company was established. They issued travellers' cheques (in 1891), and later became travel agents and arranged tours;

➢ In 1951, Vladimir Raitz, a Polish refugee living in London, chartered a Dakota to take a group of tourists to Corsica. This was the forerunner of the modern air-charter package holiday. By 1971, over 50% of overseas holidays were packages (Lubbe, 2003:15).

2.5.11 The development of the South African tourism industry

From a local perspective, the South African festival and event culture originated with the commemoration of the arrival of the 1820 British Settlers in Grahamstown. This was a modest beginning in 1974. Snowball and Willis (2006:44) also commented on this festival saying that, in the beginning, this festival had about 60 events, and lasted a week. This was the only festival that became well established during the 1980s (Van Zyl, 2005:53). This can be seen

in the timeline shown in Figure 2.5. Secondary research found that the majority of South African festivals and events was established only during the late 1990's and started to peak from 2000 onwards.

Events such as the KKNK, eventify occasions in a fashion similar to the ancient festivals by turning an everyday life event into a significant Cultural Event, framed and made meaningful by the presence of an audience who will respond to the celebrated event (Hauptfleisch, 2001:170).

Festivals and special events play a significant role in communities' lives, because they provide important activities and spending outlets for locals and visitors, and enhance the image of local communities. They are also unique travel attractions because they do not rely upon expensive physical development. The success of festivals and special events is more dependent upon the enthusiasm of the local community and event organisers than upon unique natural or built attractions. Most importantly, small events require minimal capital development and make use of existing infrastructure. They are generally volunteer intensive and locally controlled. However, they have the potential of generating substantial returns on small financial investments (Gursoy, Kim & Uysal, 2004:171).

Although increased publicity has been given to the events industry as we have come to know it over the past few years, the phenomenon of events can hardly be described as a new one. Throughout history, events have been an important feature of people's lives (Tassiopoulos, 2000:2).

A survey of the oldest South African event organisations, most of which were meeting organisations, indicates that these started operating in the early 1970's. The South African exhibition sub-sector started operating in the middle of the nineteenth century. The South African event management sector has shown a marked growth since 1994 as the tourism industry has reoriented itself towards harvesting the benefits of inbound tourism to the country (Tassiopoulos, 2000:2).

The apartheid heritage has left South Africa with enormous developmental challenges that require a holistic approach if they are to be met. Event management should be seen as one of a number of strategies that destination managers could use to overcome these challenges (Tassiopoulos, 2000:3).

Its youthfulness, however, means that the events industry does not have all the characteristics of more established industries, such as a well-developed professional standard which reflects well-defined terminology, adequate market intelligence, appropriate education and training structures, and clear entry routes (Tassiopoulos, 2000:3).

The following figure (Figure 2.5) shows the development of the South African tourism industry from the arrival of Bartlomues Dias to the present and future with the Soccer World Cup in 2010 which will be a major boost for the tourism industry.

Various written accounts of people travelling to South Africa during the 1700s and 1800s exist for exploration, the science of zoology and botany, geographical expeditions, anthropological studies and missionary journeys. Travelling also was done in order to determine the potential of the unexplored regions of South Africa and on assignment for the Dutch East India Company (Lubbe, 2003:15).

1487 Arrival of Bartlomues Dias

1652 Jan van Riebeeck establishes settlement in Cape Town

1700-1800 Exploration of South Africa

1906 South Africa marketed as the health resort for Europeans.
1910 South Africa gains independence
1914 - 1918 First World War
1919 Overseas advertising conference

1927 South African Railways establishes tourist department
1930 South African Railways tourist department merges with Publicity and
    Travel department of South African Railways and Harbours
1934 South African Airways
1938 Tourist Development Corporation founded
1939 -1945 Second World War
1947 South African Tourism Corporation (Satour) founded
1949 FEDHASA was founded

1960 S. Kerzner takes over The Palace Hotel and established South Africa's
    first five star hotel – The Beverly Hills Hotel
1961 South Africa becomes a Republic
1963 Department of Tourism established
1968 The Southern African Tourism Services Association founded   (SATSA)
1969 Southern Sun Hotels founded
1972 Grahamstown Arts festival commenced

1985 Beginnings of Magoebaskloof Spring festival

1991 Natal Witness Hilton Arts festival was established
1993 KKNK (Oudtshoorn)
1994 First democratic election
1995 Rugby World Cup, Oppikoppi
1997 Aardklop Arts festival (Potchefstroom)
1999 Cape Town Festival

2000 SATOUR changes to South African Tourism

2001 Volksblad Arts Festival (Bloemfontein)
2002 Stokkiesdraai Arts Festival (Wellington)
2002 World Summit on Sustainable development (Johannesburg)
2003 Cricket World Cup
2004 Innibos Arts Festival started (Nelspruit)

2010 Soccer World Cup

Figure 2.5: Historical highlights of South African Tourism

During the 19th century, South Africa acquired a tourist reputation, especially as a health resort. It is interesting that as 'Health Tourism' emerged as one of the latest global trends; South Africa seemed to be in the business once more, with Cape Town having established itself as the 'health tourism capital' of the country. In 1906, the South African Railways established a publicity department which soon opened an office in London, marketing South Africa as 'the health resort of Europe' (Lubbe, 2003:15).

In 1914, parliament set £25 000 aside for overseas marketing, but, with the outbreak of World War I, the campaign fizzled. A year after the end of the war, in 1919, an Overseas Advertising Conference was held in Johannesburg (Lubbe, 2003:15).

In 1927, more progress was made when the South African Railways established a separate Tourist Department which merged with the Publicity and Travel Department of the South African Railways and Harbours in 1930 (Lubbe, 2003:15).

The next important step was the development of the Tourism Development Corporation in 1938. Its major aim was to promote tourism to South Africa. Because of the Second World War, it could not fulfil this task. After the war, in 1947, the South African Tourism Corporation (Satour) was established with the same purpose. In 1963, the South African Government established the Department of Tourism that aimed to promote tourism to and within South Africa. During 1964, the law was amended to give the Minister of Tourism the power to delegate some tourism promotion to the administrators of the provinces. In 1966, the administrators' powers were withdrawn and the Department of Tourism had to accept full responsibility for the promotion of tourism within the country (Lubbe, 2003:15).

In 1960 Sol Kerzner's hospitality career began with the purchase of The Palace Hotel in Durban, South Africa. Shortly thereafter, Kerzner built The Beverly Hills Hotel, which became South Africa's first five-star hotel. He then partnered with South African Breweries to establish the Southern Sun hotel chain, which became South Africa's leading hotel and resort company with 30 operations throughout southern Africa (Kerzner, 2004:1).

The year 1967 was declared International Tourist Year. In the same year, the World Bank established a Tourism Projects Department to fund relevant projects in developing countries. This has continued up to date and South Africa has also benefited from it (Lubbe, 2003:15). In 1972 the Grahamstown Arts Festival started and in 1985 the Magoebaskloof Spring festival emerged.

In 1969, Southern Sun Hotels was founded and as yet has had 40 years of experience in providing great hospitality to its local and international guests (Southern Sun, 2006:2). Hotels, specifically accommodation in hotels, form part of tourism and play a vital role as such. (See also Figure 2.3). Accommodation was also built around new found attractions to ensure that people would stay longer at a certain place.

After 1990 with the lifting of sanctions the following tourism opportunities emerged: increased positive international reporting on the country as a tourism destination, more airline flights to and from South Africa and increased cooperation between Southern African countries (Lubbe, 2003:15). Natal Witness Hilton Arts Festival started to run in 1991. The KKNK started their operation in 1993 and Oppikoppi followed in 1995. Aardklop had its beginning in the year 1997 whereas the Cape Town Festival began in 1999. Innibos followed in the footsteps of the rest with its beginnings in 2004.

The tourism history of South Africa is barely 40 years old. In 1961, for instance, only 31 000 overseas tourists visited the country. Pushed by an activist, government, tourism boomed in the1960's and grew by 20 percent annually. The

rapid growth ceased with the first oil shocks of 1973 and remained lacklustre until 1983 – 1984, when the government of P.W Botha attempted reforms and made South Africa an acceptable destination to some tourists. In 1985-1986, however, the nation's international arrivals took a record plunge due to imposition of economic sanctions by Western countries and nation wide riots that followed Botha's intransigence regarding apartheid (Ahmed, Heller & Hughes, 1998:82).

Rioting resulted in a nationwide state of emergency and opened the way for a subsequent reformist government, under the leadership of F.W. de Klerk. That development brought a 21 percent bounce in tourist arrivals in 1989. As tension rose during the de Klerk era, however, South Africa experienced record levels of political violence (10 000 blacks killed) exceeding the levels of those during 1984 to 1985. The ensuing political violence, economic recession and political uncertainty restrained tourism growth to single digits (Ahmed, Heller & Hughes, 1998:82).

The end of white minority rule led to a tourism boom in 1994 and 1995. In particular, South Africa's hosting of the 1995 Rugby World Cup attracted tourists. By 1996, however, the realities of rampant crimes and violence began to affect tourism arrivals (Ahmed, Heller & Hughes, 1998:82).

The first casino, the Sun City resort was established by Sol Kerzner. Prior to 1994, South Africa's gambling industry was primarily resort-based and located in rural areas. However, following the introduction of a revised dispensation for the industry with the passage of new legislation in 1996, gambling was introduced to urban areas. This saw a period of rationalisation in which the group disposed of some of its rural properties and made application for new casino licenses in the country's major metropoles (Sun International, 2006:2). From casinos, events started to appear, for example at the Super Bowl at Sun City. This also boosted tourism.

The year 2001 saw the beginning of two new festivals – Volksblad in Bloemfontein and the one city festival in Cape Town. Stokkiesdraai Arts Festival in Wellington came about in 2002 and Innibos, situated in Nelspruit, in 2004.

2.6 SUMMARY

To define festivals or special events, they can be regarded is an occurrence arising from those non-routine occasions which have leisure, cultural, personal or organisational objectives set apart from the normal activities of daily life.

Festivals contribute economically to tourism and the society as such form an integral part thereof. With effective marketing, festivals can achieve higher goals set by them. Festivals have played a role from the early stages of the world and from there started to snowball into different countries and cultures for various reasons and celebrations. At present festivals are attractions for thousands of people.

The research has clearly shown that festivals contribute to the image of the host communities, changing them from quiet, peaceful places to lively, active spots. The publicity that the communities get from festivals has a big influence on the tourists' perception of that particular community.

Tourism can be used as an instrument for community growth. Tourism and events or festivals must adapt to the current environment and choose the right segment and the right marketing strategy to stay competitive in the field. From a marketing perspective the tourism market consists of prospective tourists who have needs and money and who are prepared to spend money on a unique experience.

Festivals are unique travel attractions because they do not rely upon expensive physical development. Rather, the success of festivals and special events is more dependent upon the enthusiasm and participation of the local community.

In the history of tourism, events have always had a significant influence on the society. This influence can be interrupted by a dull routine or just emphasise some important feature of the community. The first urge to travel arose from the ancient human needs of trade and commerce. Tourism played a role from the Classical world right through to World War I and II.

In South Africa tourism made a large contribution to the economy. After 1990, with the lifting of sanctions, the following tourism opportunities emerged: increased positive international reporting on the country as a tourism destination, more airline flights to and from South Africa and increased cooperation between southern African countries. Natal Witness Hilton Arts Festival started to run in 1991. The KKNK began in 1993 and Oppikoppi followed in 1995. Aardklop had its beginning in 1997 whereas the Cape Town festival began in 1999. Other festivals which started in the new millennium were Volksblad, Stokkiesdraai Arts Festival and Innibos. All these festivals are depicted in Figure 2.5. This gives a clear indication when these festival started and where they fit into the South African tourism history.

CHAPTER 3

MARKET SEGMENTATION OF EVENT TOURISM

3.1 INTRODUCTION

There are many types of events, varying in size and impact. In South Africa, special events and festivals have become a growing industry. Event tourism is estimated to expand even faster than the 10% annual growth rate predicted for the South African tourism industry (George, 2004:366; Saayman, Saayman & Rhodes, 2001:443). As might be expected of an up-and-coming industry, literature on festival and event tourism, especially regarding the specialised field of arts festivals, is growing but is still limited (Van Zyl, 2005:39). Events, festivals and conferences provide exciting opportunities to market South Africa and its provinces as a preferred tourist destination and provide economic benefits to the local economy (George, 2004:366). Marketing of events and festivals not only play a vital role in the success of the event but also increases the awareness of festivals.

The reputation of events and festivals in South Africa has grown in recent years, largely due to event managers adopting the principles of marketing to increase the awareness of special events. The essential difference between the marketing of events and the marketing of tourism offerings (e.g. visitor attractions, hotels) is that events are usually once-off or annual occasions (George, 2004:366) whereas tourism offerings are there to be enjoyed all year round.

The use of marketing principles and techniques are relevant to event management for the following reasons:

> ➤ provide event managers with a structure for decision-making that should result in a successful event or festival;

> ➤ assist in convincing event sponsors that the festival or event is a viable medium of communication with their target market;

> ➤ demonstrate knowledge of marketing planning and marketing management to city and provincial governments (local governments often financially assist festivals and events);

> ➤ assist in competing for consumers' disposable income and time. Consumers have a wide selection of leisure activities to choose from when spending their time and income. The aim of marketing is to persuade consumers to attend the event rather than spend their time and money on other leisure activities (George, 2004:369).

The factor that determines whether or not an attraction is thriving is the response of the market to the product offered. Events and festivals are part of the art attraction. It is therefore vital that attraction developers and managers understand the market for visitor attractions. This is not as easy as it sounds, for there does not seem to be a single attraction market that can be easily defined, identified and measured. Instead, there is a hierarchy of attraction markets, as indicated by Figure 3.1 (Swarbrooke, 2002:67).

Figure 3.1 illustrates that there are various markets for the variety of attractions and there are various subgroups within the market as a whole. The markets for the different types of attractions are not mutually exclusive. Many of them are strongly interrelated, such as the market for museums, theatres and historical buildings. Furthermore, the subgroups are not homogeneous (Swarbrooke, 2002:68).

The homogeneous groups make market research in the attractions field difficult in mainly three ways. Firstly, as much of the attractions lie in the private sector, many key facts and figures are commercially sensitive and are not published. Secondly, relatively little is known about why people visit attractions in general and why they choose to visit particular attractions specifically. Thirdly, at

attractions where no entrance fee is charged, no monitoring of visitors is done, so that the number of visitors is not accurately recorded (Swarbrooke, 2002:68).

By discussing different segmentation methods, this chapter aims to do an assessment of existing literature concerning segmentation and to explain the importance of market segmentation specifically for event tourism. This information can be helpful if profiling festivals for effective marketing in future.
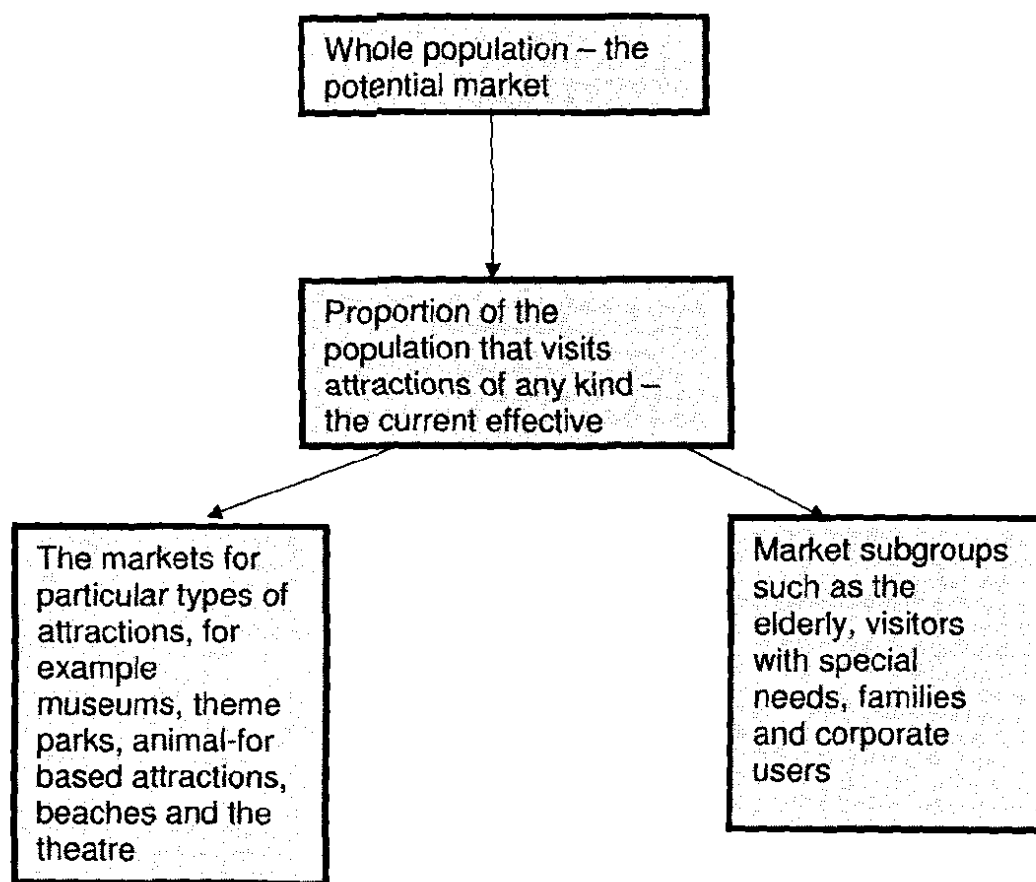
Figure 3.1: The hierarchy of attraction markets (Swarbrooke, 2002:68)

3.2 MARKET SEGMENTATION

The primary goal of market segmentation is to identify the specific segments that are most interested in specific goods and services and to focus marketing efforts

on these segments in the most effective way. Market segmentation allows travel marketers to understand the needs and wants of travel groups and to efficiently communicate with them. Market segmentation makes it possible to find homogeneous smaller markets, thereby helping marketers to identify marketing opportunities and to develop products and services in a more tailor-made manner (Lancaster & Reynolds, 1999:8; Kotler, 2003:549; George, 2004:125).

Since tourism is part of a competitive environment, it is important to determine exactly who the consumers and the potential consumers of the product are. It is no longer possible to serve an entire market and it is therefore necessary to segment markets and to concentrate on a single segment or a few segments. This segmentation should be based on research, especially when there is global competition (Saayman, 2002:83).

Marketing strategies of destination organisations often encounter the problem of not knowing how to appropriately segment the market, as well as not knowing how to package differentiated products and services for target segments. Segmentation is a methodological process of subdividing a market into distinct groups that might require unique experiences or marketing services mixes (Bloom, 2005:2).

The strategy of market segmentation according to Goeldner and Ritchie (2006:537) recognises that few vacation destination areas are universally acceptable and desired. Therefore, rather than dissipate promotion resources by trying to please all travellers, the aim should fall on promotional efforts specifically targeting the wants and needs of likely prospects. One of the early steps in marketing tourism, then, is to divide the present and potential market on the basis of meaningful characteristics and to concentrate promotion, product, and pricing efforts on serving the most prominent portions of the market – the target market.

A second option of segmentation is to select target markets by using three strategies, as indicated in Figure 3.2:

Undifferentiated strategy

Concentrated strategy

Multi-segment strategy
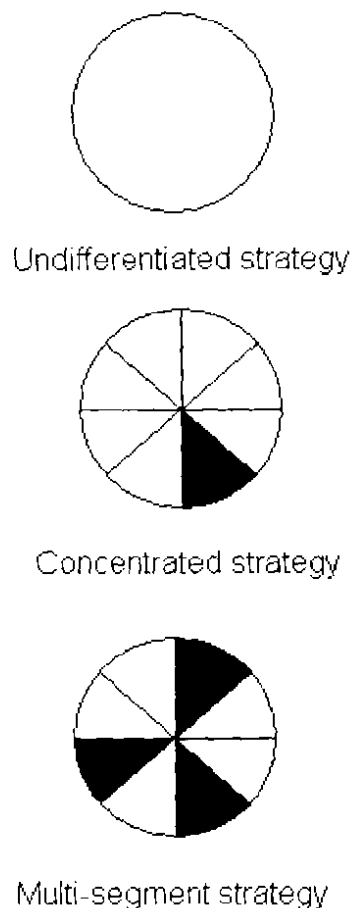
Figure 3.2: Strategies for selecting target markets (Lamb, *et al.*, 2004:178)

➢ When no specific group is targeted and marketing is done for an open public, almost like the "shotgun" method, it is known as the undifferentiated strategy.

➢ The concentrated strategy is used when only one group or segment is targeted and the marketing is focused on that specific group.

➢ If the festival offers a spectrum of products, more than one segment could be targeted and used for marketing purposes. The multi-segment strategy is then used.

Approaches to the market can be either single or multiple (See Figure 3.2). The single target market approach:

- Market segmentation is done with a single target market and the marketing manager selects those participants who have the same needs;
- This is known as the "rifle" method; the focus being on one segment or market only.

The multiple target market approach:

- This approach to market segmentation contains two or more segments that are targeted by the programme;
- This approach is also used when needs overlap. It is also known as the "shotgun" method, seeing that a number of segments are involved;
- To be viable, the given segment should contain the following characteristics:
- Substantive
- Identifiable
- Analysable (Saayman, 2002:92).

The multiple target market approach is usually used because a single segment seldom relies on a single specific solution.

The following criteria should be applied to differentiate between segments:
- Measurable;
- Accessible;
- Substantial;
- Reliable;
- Durable;
- Competitive;
- Differential;
- Actionable;
- Validity; and
- Responsive (Lancaster & Reynolds, 1999:10; Saayman, 2002:90; Kotler & Armstrong, 2004:251; Lamb et al., 2004:166).

The criteria used for segmentation should have the following characteristics:

> The ability to distinguish between segments. Each segment has a unique set of common characteristics and can be served by an equally unique marketing strategy;

> Each identified segment should have an adequate potential size in order to justify the time and effort involved in planning specifically for this business opportunity;

> Each identified segment should be such that it can be described or measured by a set of descriptors. It should be possible to communicate with the customers in the segment by means of a distinctive promotion, selling and advertising strategy;

> Each identified segment should be relevant to its purchase situation (in other words it is a decision-making factor or a factor which affects process behaviour);

> The company should be able to make the necessary changes to its structure, its information system and its decision-making system so that these can become focused on the new segments (McDonald & Dunbar, 1995:15).

3.2.1 The advantages and disadvantages of segmentation

Segmentation can have a number of advantages and disadvantages. The benefits of segmenting a market are listed below:

> Market segmentation allows marketers to concentrate on consumer needs and wants;

> Market segmentation helps marketers to develop an effective marketing mix;

> Market segmentation enables more efficient market positioning;

> Recognising customers' differences is the key to successful marketing, because customers' needs can then be matched with the products and services of the company;

- Segmentation can lead to niche marketing where applicable. The organisation can meet most or all of the needs of customers in that niche segment;

- Segmentation can lead to concentration of resources on markets where competitive advantages are great and returns are high;

- By means of segmentation a competitive advantage may be gained by having a different approach than the market competitors;

- By means of segmentation, the organisation can be marketed as a specialist in the selected market segments, with a better comprehension of customers' needs; thus giving the products/services an advantage to the competitors' products;

- Segmentation promotes new product ideas;

- A long-term relationship can be established with a specific customer group;

- Market segmentation indicates how best to subdivide travel markets and how to target the right kind of visitor, assisting in gaining a better understanding of this market;

- Products and marketing mixes customised to each selected segment can be developed;

- A market segment characterised by expectations or preferences that reflect the destination strengths leads to a competitive advantage;

- Market segmentation has been extensively used to understand the various characteristics of tourists and for developing marketing strategies;

- Segmentation is a prerequisite for planning event programs efficiently;

- Because market segments differ in size and profit potential, segmentation helps decision-makers define marketing objectives more accurately as well as to allocate scarce resources to brands and market segments (McDonald & Dunbar, 1995:16; Marx, et al., 1998:535; Bennet & Strydom, 2001:64; Dibb & Simkin, 2001:230; Jang, Morrison & O'Leary, 2002:367; Saayman, 2002:85; Slabbert, 2002:2; Bloom, 2004:723; Dolnicar, 2002:3;

George, 2004:135; Lamb *et al.*, 2004:165; Lee, Lee & Wicks 2004:62; Molera & Albaladejo, 2006:3).

The disadvantages of segmentation are:

> It can be an expensive process;
> People do not always know how to interpret the data;
> It may be difficult for the marketer to know how accurately or broadly to segment;
> There is a tendency to appeal to markets that are not viable (George, 2004:135).

Primary reasons for segmenting the market:
> To target a specific market;
> To do effective marketing;
> To save on marketing costs;
> To divide the whole market into smaller segments that have the same needs.

There are only a few tourism offerings that can attempt to appeal to an entire market. Therefore, it is useful for marketers to focus their efforts by segmenting (George, 2004:125).

Because of the wide market that it attracts, no festival or event can offer all things to all people. A marketer can rarely please everyone in a market (Yeoman, Robertson, Ali-Knight, Drummond & McMahon-Beattie, 2004:19). Hall (1992:137) states that it is vital to understand the behaviour of festival and event visitors and to incorporate this knowledge into marketing strategies.

Since tourism is part of a competitive environment, it is important to determine exactly who is consuming the product as well as whom the potential consumers are. It is no longer possible to serve a total market and it is therefore necessary

to segment markets and to concentrate on a single segment or a few specified segments. These decisions should be based on research, especially when one is competing globally (Saayman, 2002:83).

The division (segmentation) of the market can be done in various ways. Depending on the situation, a marketer may experiment with a variety of segmentation variables. Table 3.1 gives an indication of these variables.

Table 3.1: Variables of segmentation

Variables of segmentation	Definition of variable	Sub-categories
Demographic	The study of the structure of human populations	• Gender segment • Income segment • Age and family life cycle
Geographic	Relating to geographical distribution	
Psychographic	A graphic representation or chart of the personality traits and lifestyle of an individual or group.	• Personality • Lifestyle
Social class	A term describing the standing of an individual in the social hierarchy	
Behavioural segmentation	Behavioural	• Desire for benefits

	segmentation divides the population on grounds of their actions.	• Purchasing occasions • User status • Attitudes towards offerings • Loyalty • Buyer readiness
Socio-economic	Describes the impact of visitors on the host community and their economy	
Purpose of travel	Motivation for the journey	

(Burke & Resnick, 1999:41; Lubbe, 2000:77; Saayman, 2002:94; George, 2004:126; Kotler & Armstrong, 2004:240; Lamb *et al.*, 2004:168).

The following figure (Figure 3.3) gives an indication of the way in which the market or population can be segmented. Four segmentation variables are emphasised. These are demographic, geographic, psychographic and behaviouristic. These four segments can be included in research to find out more about the whole population to segment it into smaller groups with the same income, age, province where they come from, attitudes and habits. This can also help event organisers to target a certain group and do effective marketing. Furthermore, information about the attitudes of tourists at a certain event and their preferences can be used to diversify activities at events.

POPULATION

DEMOGRAPHIC	GEOGRAPHIC	PSYCHOGRAPHIC	BEHAVIOURISTIC
* income	*climate	*values	*habits
* age	* region	*attitudes	*preferences
*occupation	*urban / rural	* lifestyle	*purpose
* family size		*interest	*benefits sought
* education		*activities	
		*personalities	
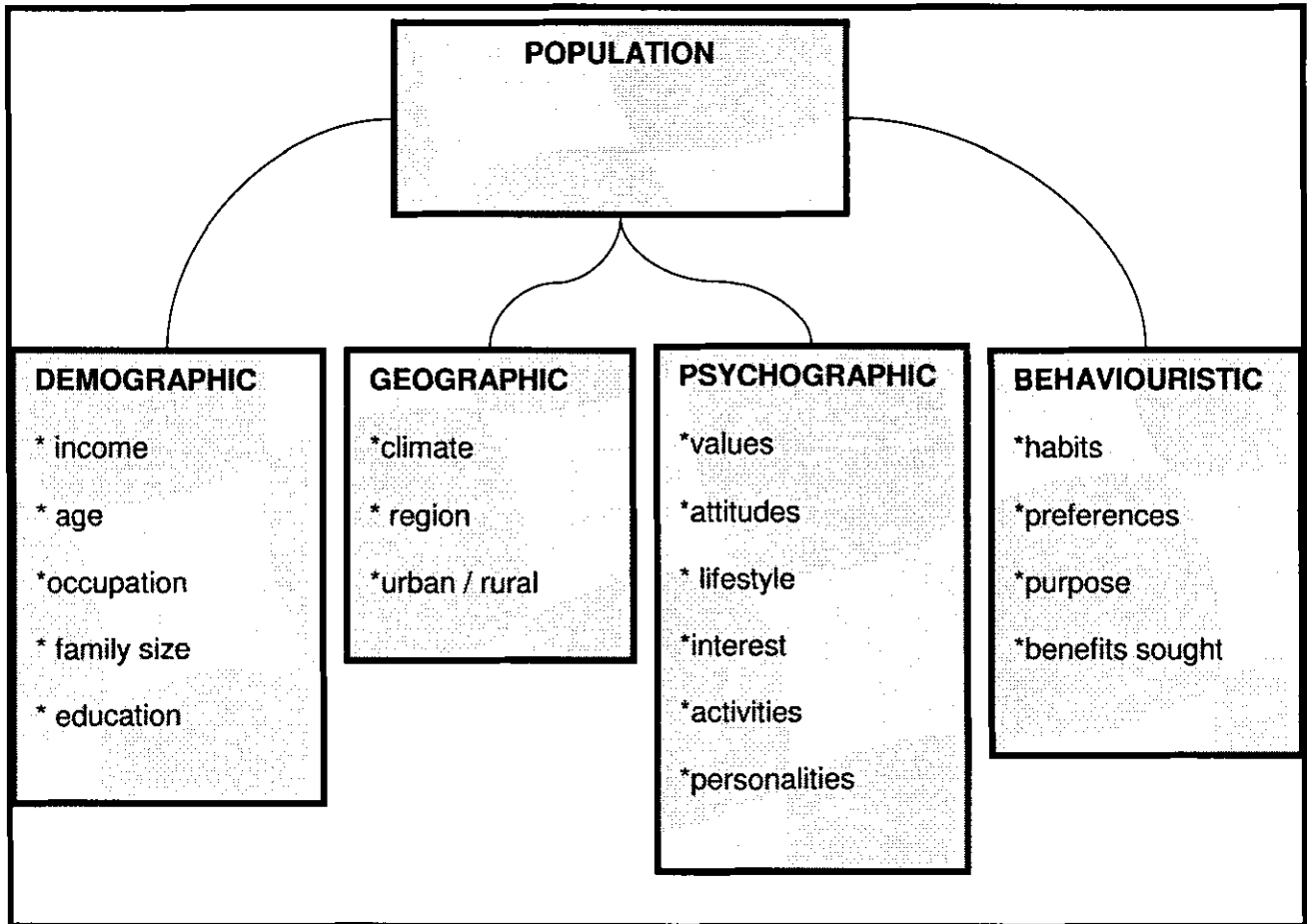
Figure 3.3: Market segmentation (Burke & Resnick, 1999:41).

3.2.2 Market segmentation processes

There is a wide range of segmentation processes. In this dissertation five methods will be discussed. The reason for this is that these processes have been in use for a number of years. The following Figure (Figure 3.4) illustrates the segmentation process of Wood (2002:55):
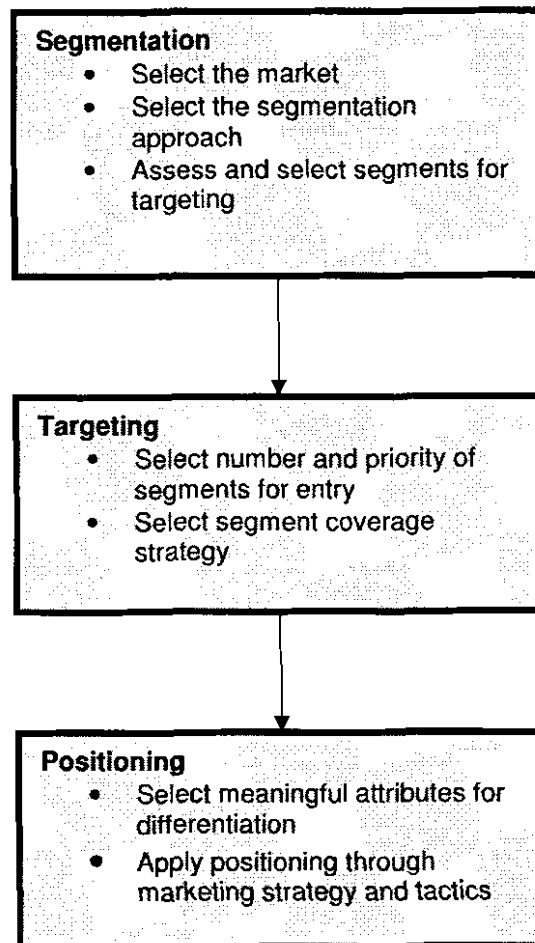
Figure 3.4: The segmentation process (Wood, 2002:55)

Market segmentation:

> ➤ Identify criteria for segmenting the market;
> ➤ Develop segment profiles;
> ➤ Consider variables for segmenting the market;
> ➤ Validate emerging segments.

Market targeting:

> ➤ Assesses segment attractiveness;
> ➤ Selects the target market segments;
> ➤ Decides on a targeting strategy.

Market positioning:

> Evaluates the position of each segment;

> Adapts marketing mix components for each segment;

> Understands consumer perceptions;

> Positions products in the mind of the targeted consumer (Dibb & Simkin, 2001:230; George, 2004:12).

The second process (Figure 3.5) is proposed by Saayman (2002:88) and is done in six steps. The first step is analysing the product. This entails analysing what the product offers the customers and determining its advantages. The second step is to analyse the total market – what do the customers want from the product? The third step is to profile the market. This can be done by means of research –age, income, demographics and other useful information. The fourth step involves selecting the market on which marketing will be concentrated and positioning the product in the industry. The final step is to do the marketing mix. This consists of Price, Place, Promotion and Product and is also known as the four P's.
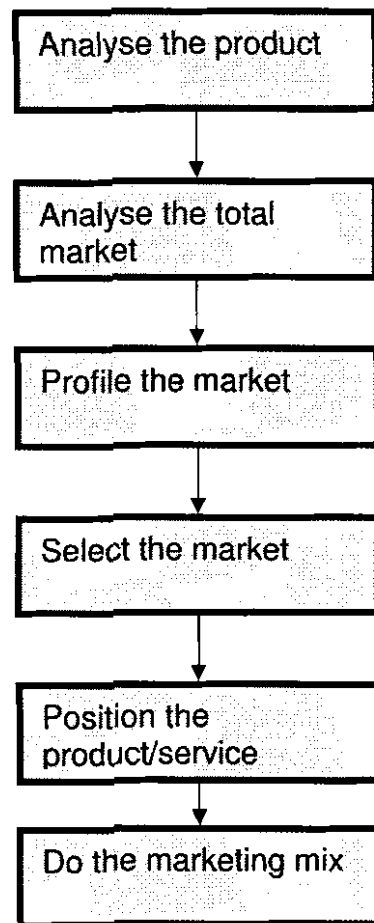
Figure 3.5: Segmentation process (Saayman, 2002:88)

A third segmentation process as done by Lamb, *et al.* (2004:177) is indicated in Figure 3.6. These authors do market segmentation in six steps. The first step in this process is to select the market that the product wants to serve. Step two is to list the potential needs of that market. Step three is to choose the type of segmentation needed to divide the market in smaller sections. Step four is to select descriptors. Step five entails to profile the market, determining the type of customer that buys the product. Finally, in step six, determining dimensions are identified.
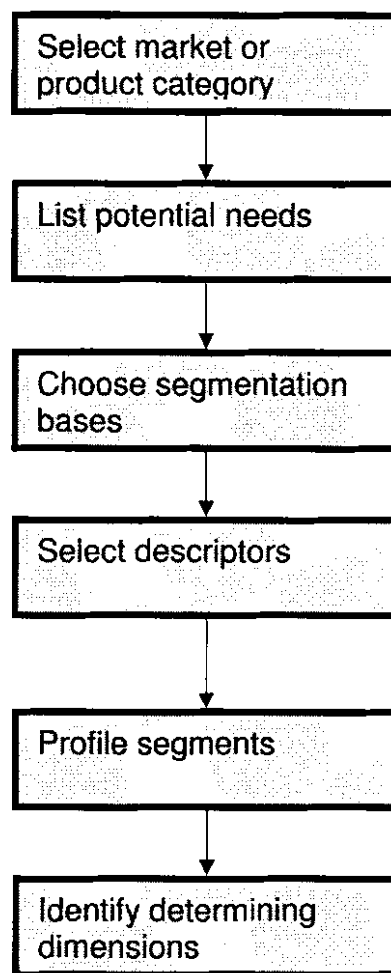
Figure 3.6: Segmentation process (Lamb *et al.*, 2004:177)

McDonald and Dunbar (2005:16) describe a fourth process in more detail.

The first part of the process, as illustrated in Figure 3.7, contains seven steps which cover the essential steps that should be followed to develop a segmented structure for the market. This structure is applied to the entire operational market of the business and not only to that part of the market which is currently successful. It considers competitors' products and/or services, as well as own products and services. Therefore, a clear definition of the specific market is essential.

The first step entails drawing a market map. The supplier is required to present a diagram of the operational market. This is done on a flow chart which indicates the flow of products to the final users and the cash flow of the products back to the supplier. For many businesses, however, a flow chart that simply tracks the physical delivery of their products/services is inadequate, because it indicates neither the role played by 'influencers' on the purchase decision nor the purchase decision routines encountered by the business.

Once the market map has been completed, it is then necessary to determine at which stage(s) segmentation should occur. Steps 2, 3 and 4 progressively make it possible to observe any stage of this flow chart as well as to draw a two dimensional picture illustrating who buys what, where, when and how.

Step 5 moves from the mechanistic analysis of the market covered in the previous four steps, to considering the reasons why the various products are bought. For each cell these are then listed in the 'who buys what, where, when and how' cascade. The research of this dissertation will clearly explain and indicate which shows are mostly watched and at which event the most tickets were sold.

In step 6 a technique of grouping these cells in order to obtain the best fit is described. These cells can be grouped in alternative ways by using a selection of standard profiling descriptions such as demographic, geographic and psychographic; attitudes; buying criteria; or any combination of these, in order to find if better fits can be achieved.

The final step (Step 7) then subjects each 'cluster' to a segmentation test. The process is primarily done in a format designed to utilise information already held by the company. As progress is made through the various steps, the process may, however, reveal information shortfalls which will have to be addressed. In

many instances, the most appropriate method of addressing these shortfalls will be by commissioning market research.

The fourth process according to McDonald and Dunbar (2005:19) is divided into two parts – step 1 through to 7 and then 8 up to 12.

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                    ┌─────────────────┐
                    │     Step 1      │
                    │   Market Map    │
                    └─────────────────┘
             ┌──────────────┴──────────────┐
   ┌─────────────────┐          ┌─────────────────────┐
   │     Step 2      │          │       Step 3        │
   │    Who buys     │          │ What is bought, where,│
   │                 │          │   when and how is it │
   │                 │          │       bought        │
   └─────────────────┘          └─────────────────────┘
             └──────────────┬──────────────┘
                    ┌─────────────────┐
                    │     Step 4      │
                    │ Who buys what, where,│
                    │   when and how  │
                    └─────────────────┘
                             │
                    ┌─────────────────┐
                    │     Step 5      │
                    │  Why is it bought│
                    └─────────────────┘
                             │
                    ┌─────────────────┐
                    │     Step 6      │
                    │ Segmentation (Stage 1)│
                    └─────────────────┘
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                    │     Step 7      │
                    │ Segmentation (Stage 2)│
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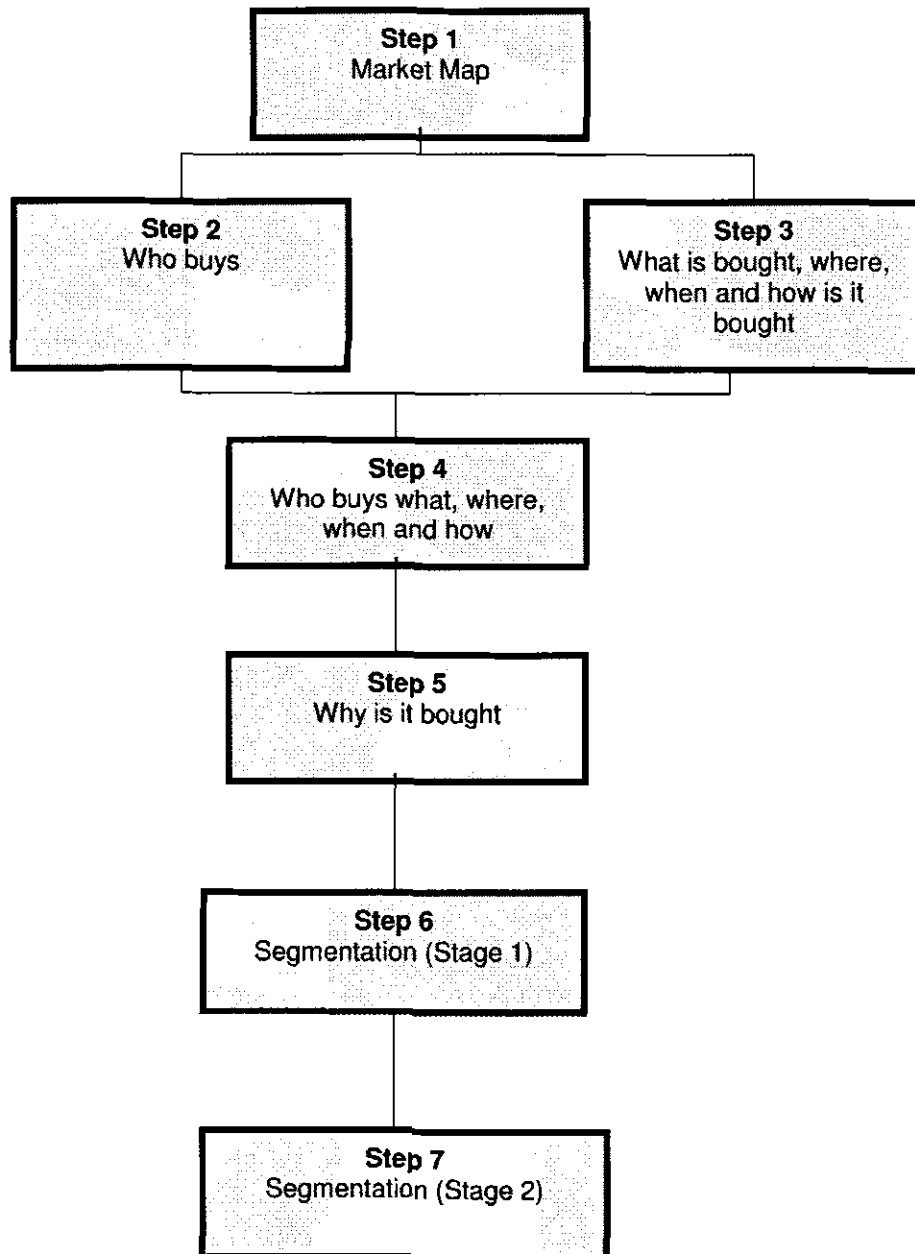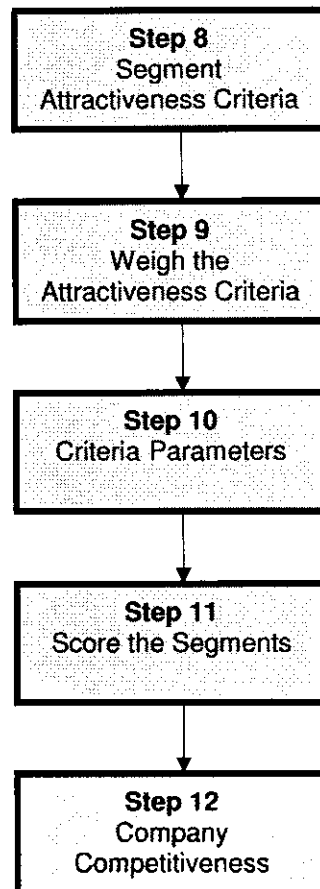
Figure 3.7: Market segmentation: Part 1 (McDonald & Dunbar, 2005:18)

The second part of the marketing segmentation process indicates how to select the recommended operational segments of the business. This part consists of five more steps as summarised in Figure 3.8.

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┌─────────────────────────┐
│        Step 8           │
│       Segment           │
│ Attractiveness Criteria │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│        Step 9           │
│      Weigh the          │
│ Attractiveness Criteria │
└─────────────────────────┘
            │
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│        Step 10          │
│   Criteria Parameters   │
└─────────────────────────┘
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┌─────────────────────────┐
│        Step 11          │
│   Score the Segments    │
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            │
            ▼
┌─────────────────────────┐
│        Step 12          │
│       Company           │
│    Competitiveness      │
└─────────────────────────┘
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Figure 3.8: Market segmentation: Part 2 (McDonald & Dunbar, 2005:19)

To summarise, each step will be discussed shortly:

Step 1: Define the value added chain between supplier and final user.

Step 2: Do a preliminary listing and standardised profiling of the various buying groups at the point in the market map where segmentation is to occur.

Step 3: List all relevant competitive product/service types, distribution channels, frequencies and purchasing methods.

Step 4: Combine Steps 2 and 3 to produce a series of micro-segments.

Step 5: Understand what each micro-segment wants to achieve with its particular purchase.

Step 6: Bring together those micro-segments that display similarities.

Step 7: Evaluate the resulting segments by using a checklist of size, differentiation and viability and test the compatibility of the segments with the business or festival (in the case of this dissertation).

Step 8: Define the factors that make a segment attractive to the company.

Step 9: Establish the comparative importance of one criterion to another.

Step 10: Set high, medium and low scores for each attractiveness criterion.

Step 11: Calculate the overall attractiveness of each segment.

Step 12: Establish the ability of the company/festival to compete in each segment and decide in which segment(s) to operate.

The above four processes and an integrated process will be tabled and the different processes will be discussed and measured against each other. The integrated process will then be discussed and illustrated in a figure.

Table 3.2: Summation segmentation processes

Process 1 (Wood, 2002:55)	Process 2 (Saayman, 2002:88)	Process 3 (Lamb *et al.*, 2004:178)	Process 4 (McDonald & Dunbar, 2005:18)	Integrated process for smaller arts festivals
1. Segmentation • Select market • Select the segmentation approach • Assess and select segmentation for targeting **2. Targeting** • Select number and priority of segmentation for entry • Select segmentation coverage strategy **3. Positioning** • Select meaningful attributes for differentiation Apply positioning through marketing strategy and tactics	1.Analyse the product 2. Analyse the total market 3. Profile the market 4. Select the market 5. Position the product or service 6. Do the marketing mix	1.Select market or product category 2. List potential needs 3. Choose segmentation bases 4. Select descriptors 5. Profile segments 6. Identifying determining dimensions	1. Market map 2. Who buys 3. What is bought 4.Who buys what, where, when 5. Why is It bought 6. Segmentation (stage 1) 7. Segmentation (stage 2) 8. Segment attractiveness criteria 9. Weigh the attractiveness criteria 10. Criteria parameters 11. Score the segments 12. Company competitiveness	1. Select market or product category 2. List potential needs 3. Select segmentation approach 4. Profile segments 5. Focus on 1 or 2 segments 6. Position the product or service 7. Do the marketing mix

Process 1 focuses on segmentation, targeting and positioning of the market. Segmentation entails selecting the market and the type of segmentation that will be used. Targeting selects one or more segments identified in the segmentation process to focus on. Positioning takes the attributes of the product to be more competitive and focused in the market place.

Process 2 and process 3 do not differ that much from each other. Both the processes are set on selecting the product which will be the focus of the whole process, analysing the total market, profiling the market and positioning the product.

Process 4 contains two sections, the first being steps 1 to 7 and the second steps 8 to 12. This is a more detailed process, which can mean that it will be more costly. Similar to process 1, it also contains target marketing.

In all the processes it is clear that a target group should be selected and that the product which needs to be introduced to the market should be identified same as process 3 and 4. Process 3 is the most cost effective without compromising valuable information. Based on the above an integrated process for smaller arts festivals will look like this:
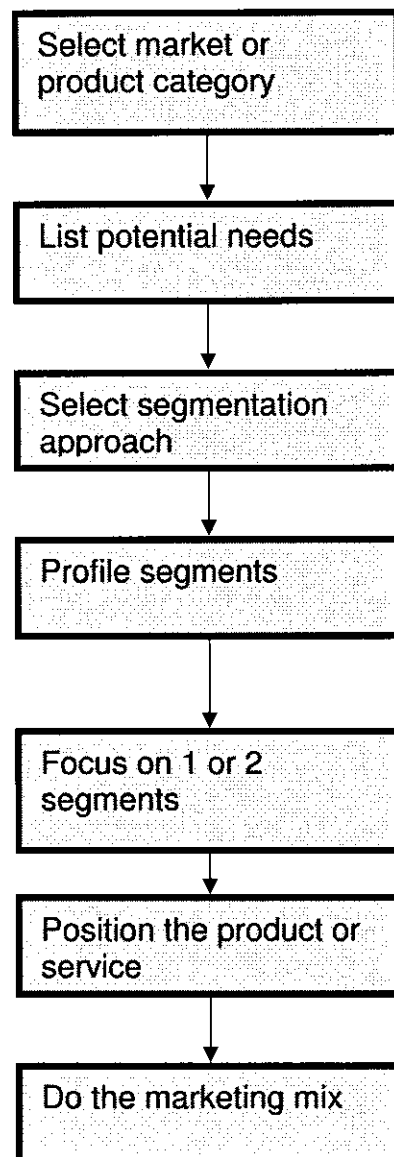
Figure 3.9: Integrated process for marketing segmentation

Step 1: Select market or product category – This will mostly be music, art and drama productions and will fall in the events and festival category. If Innibos is taken for an example the product will be a variety of local music and stage productions that include visual arts, dance, theatre and movement.

Step 2: List potential needs – Who are the customers or tourists that will spend money on entertainment and what are their needs? For example socializing, want to relax or want to see new productions. Locals or visiting from other provinces.

Step 3: Select segmentation approach – What type of segmentation will be used – demographic, psychographic or something else. In this study a profile was used to devide the market into smaller segments.

Step 4: Profile segments – There are different segments (after step 3 is completed there will be more than 1 segment) and it is the event marketing team who is responsible for selecting the right segment or segments which will be targeted. More than one segment can be identified for example at Volksblad there can be a segment that constitute of students, low income, go see free shows and another segment that can be families who have a comfortable income, go see more than one paid show and stay in a guesthouse.

Step 5: Focus on 1 or 2 segments: The market is so broad that an event marketer cannot always satisfy every market so there must be a decision on which segment or segments will the festival be satisfying. Innibos can focus on families residing from Mpumalanga and Gauteng.

Step 6: Position the product or service – Innibos needs to be positioned on the events calendar and then its rivals can be identified. Innibos is held during July. The event marketer needs to know what other events or festivals will be held during the same time and know how to position Innibos better than its competition.

Step 7: Do the marketing mix – Types of products (different artists), have to be selected, Innibos has to be promoted, ticket prices have to be set and a venue/venues (place) has to be selected.
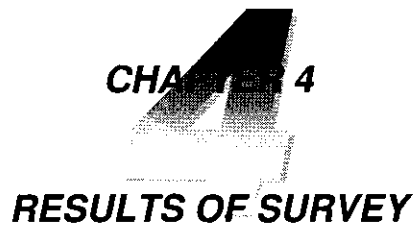
3.3 SUMMARY

Successful segmentation of the product implies an in depth understanding of the market and it is therefore time consuming. The market segments can be determined by identifying the preferences and determining the buying behaviour

of different types of consumers. With the aid of consumer patterns, market segmentation aims at dividing the heterogeneous market into homogeneous segments of people with comparable needs and buying habits. The market is subdivided to provide maximum heterogeneity and homogeneity between segments.

This chapter has given a clear indication of the importance of segmentation. If money is spent in doing segmentation, money can be saved later when marketing is done. Now that there are a few segmentation processes that can be used, the data can be analysed for this dissertation. By using this information, the organisers of festivals can improve their planning and marketing in future, thus boosting the local economy by attracting more visitors. In the current chapter, various studies of tourism and profiling of tourists have been discussed.

The strategy of market segmentation recognises that few vacation destination areas are universally acceptable and desired. One of the basic steps in marketing tourism is to subdivide the present and potential market on the basis of meaningful characteristics and to concentrate promotion, product and pricing efforts towards the desired portions of the market – the target market. The next chapter will show the results of the surveys of this study.

CHAPTER 4

RESULTS OF SURVEY

4.1 INTRODUCTION

In this chapter the survey results will be analysed and discussed. The data was used to compile graphs and tables in order to design a profile of each festival. Relationships between the three festivals and their profiles were analysed. In the following section the three festivals used for this dissertation will be discussed. The objective of this chapter is to analyse the data collected and to identify any relationships between the three festivals. Reports written by Saayman, Slabbert and Saayman (2005) and Van Niekerk, Saayman and Saayman (2005) about the profile and economic impact of the Volksblad and Innibos festivals respectably were used in this section. Furthermore to use this information gathered from the surveys to compile a tourist profile for each festival. The three festivals were:

a) Volksblad festival – Bloemfontein

This festival started out in July of 2001. In addition to the arts programme, there are a commercial and a social programme. Nols Niemand says the Volksblad festival implies a great financial benefit for the local community. Because of this, it is important that the whole community gets involved in this festival. Organisers of the Volksblad festival, says that preference for selling products is given to local businesses (Volksbladfees, 2005:1).

Mrs Briers emphasises that the Volksblad festival is different than other festivals because the two major partners, Volksblad newspaper and the University of the Free State, have specialists and facilities that can be used for free, while at other festivals the organisers have to pay for these services.

This festival had shown incredible growth during the past years. In 2001 6000 tickets were sold and in 2005 30 000 tickets were sold for productions. (Volksbladfees, 2005).

Furthermore, this festival is also the only festival in the country where well-equipped theatres are used for shows. This is due to the incredible theatre infrastructure of Bloemfontein and the campus of the University of the Free State.

b) Innibos – Nelspruit

Innibos was established in June/July of 2004. The scenery and moderate winter climate of the Lowveld supplies a suitable destination for festivals at this time of the year (Innibos festival, 2005).

A wide variety of productions is presented. Amongst others, it includes a symphony concert, Afrikaans Rock and satirical acts (Innibos festival, 2005).

The festival terrain is suited for song, dance, eating and socialisation. Extended arts markets and a flea market are offered. Multiple open stages are erected to supply entertainment to festival attendants. A Section 21 Company was created for this purpose. The Managing Board, consisting of 12 members that represent the Local Authority (Town Council), The Lowveld Chamber of Business and Tourism (LCBT), community leaders and the arts, is in control of the festival (Innibos festival, 2005).

The Festival is based on the structure of the KKNK and Aardklop Arts Festival, but is packaged to ensure a competitive edge for the occasion. In essence, the festival is an Afrikaans Arts Festival with a Portuguese influence. Some jazz and classical music productions pay no heed to cultural borders (Innibos festival, 2005).

The Lowveld is a convenient location for the biggest market, Gauteng, and already serves a competitive benefit to the Lowveld National Arts Festival. The

contemplated festival date falls right between the KKNK and Aardklop festival dates and fits into the "Great Arts Festivals Circuit".

The festival aims to host 50 productions in 12 venues (Innibos festival, 2005). This was a small beginning in its second year, but will hopefully grow to compete with the best in the country.

According to Saayman quoted by Innibos management even international tourists are starting to support local festivals. Furthermore, he says that each festival should keep its unique character to ensure that it will continue to entertain its visitors (Innibos festival, 2005).

c) Oppikoppi – Northam

Oppikoppi has established itself as a household name and leader in the live music and festival industry of South Africa (Oppikoppi, 2005).

The Oppikoppi festival was held for the first time in 1995. It takes place at Oppikoppi Farm at Northam in August each year. Lately, the festival has an offspring at Easter too (Oppikoppi information, 2005).

Oppikoppi has something in common with England's hippy-fest Glastonbury, but with better weather and added comfort. Facilities on offer include free camping, showers and toilets (Oppikoppi bands, 2005).

The remit is simple - no cover bands and no pop bands. This is a festival for original rock bands, and with 15,000 people attending regularly; the continuity of this festival is secure (Oppikoppi information, 2005).

Oppikoppi is more than just another music festival. It is a festival unlike the over-managed and over-crowded corporate European and US events. It takes place

on top of and around a "koppie" - (Afrikaans for hill), in the semi-wild Bushveld 160km north of Johannesburg.

At the first Oppikoppi held in 1995, there was one stage, 27 bands and more than 2 000 people. In 1996 and ever since, the festival has expanded. To date the festival has had up to 6 different stages. The biggest festival ever had about 15 000 people attending the event over a period of 4 days (Oppikoppi bands, 2005). Ninety bands performed at Oppikoppi in 2005.

4.2 RESULTS

The following data was collated at *Volksblad, Innibos and Oppikoppi* Arts festivals for the year 2005. Aspects covered in the questionnaire will be discussed in this section.
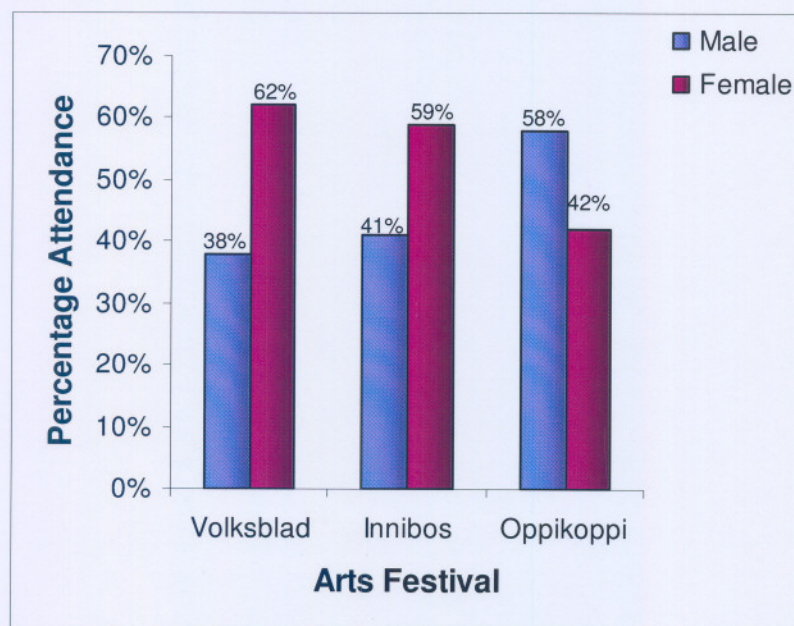
4.2.1 Gender

Figure 4.1: Gender

Figure 4.1 represents the gender of festival attendants. The research shows that the gender relation was evenly spread. At the *Volksblad* festival, 38% of festival

attendants were males and 62% females. At *Innibos* 41% were male festival attendants and 59% female festival attendants. At *Oppikoppi*, 58% of attendants were males and 42% were females.

4.2.2 Age distribution

Figure 4.2 shows the age distribution. At *Volksblad* most of the attendees were between the age of 21 and 30. At *Innibos* the age distribution was evenly spread with no age group that dominated the festival. At *Oppikoppi* most attendants were between the ages 10 to 20, however most of them are students 19 or 20 years of age. *Volksblad* and *Innibos* can be regarded as family festivals.
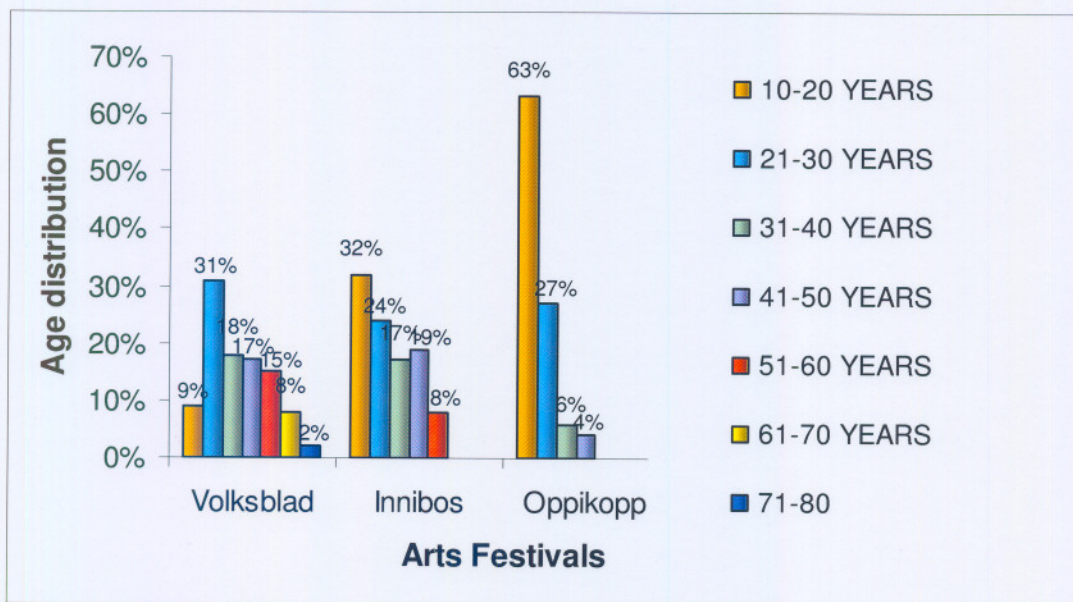
Figure 4.2: Age distribution

4.2.3 Language distribution

Figure 4.3 depicts the language distribution. It is clear from the graph that all three festivals have a very strong Afrikaans influence and that more than 80% of the attendants are Afrikaans speaking. All these festivals cater mostly for the Afrikaans speaking population. Van Zyl (2005:212) found that most of the respondents of Aardklop and KKNK also spoke Afrikaans as their mother tongue.

The researcher also found that Grahamstown was predominantly an English speaking festival.

Figure 4.3: Language distribution

4.2.4 Marital status distribution
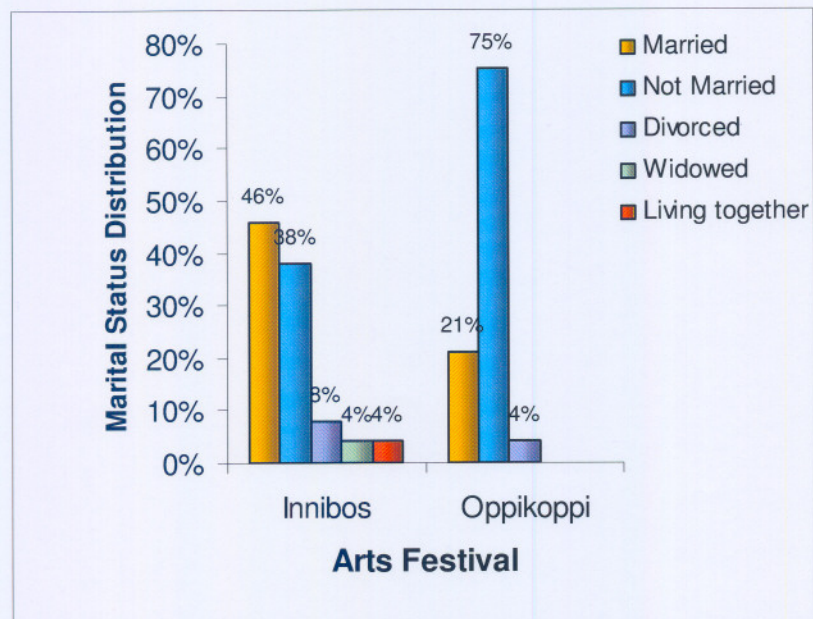
Figure 4.4: Marital status distribution

In Figure 4.4 the marital status of attendants to *Innibos* and *Oppikoppi* is depicted. 46% of attendants at *Innibos* were married and 38% were not married. At *Oppikoppi*, 75% of the attendants were not married. The reason for this is that *Innibos* is a family festival and families attend together, whereas *Oppikoppi* is mostly a festival attended by students.
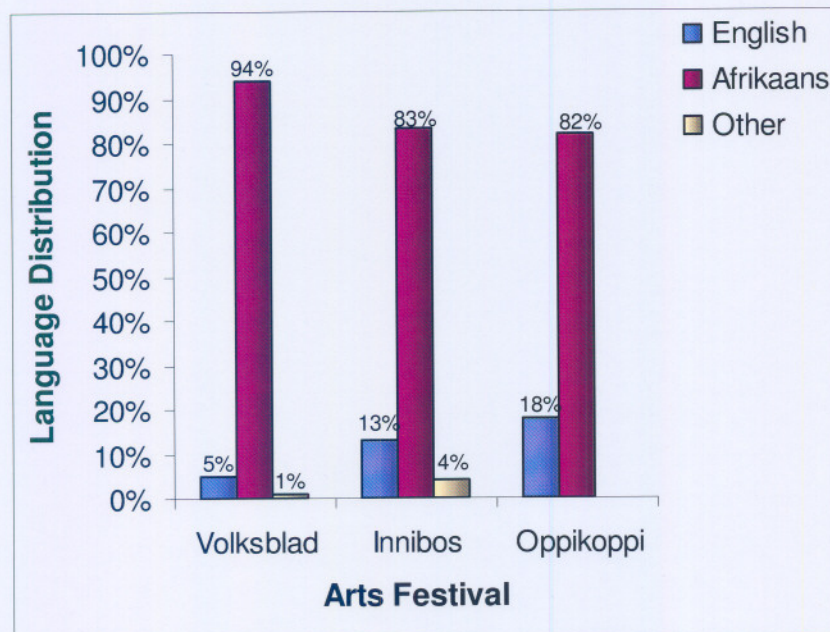
4.2.5 Occupation distribution

Figure 4.5 is a graphical representation of the occupational distribution of attendants to the three festivals. The information of *Volksblad* indicates that 29% of the respondents were people in professional occupations, 22% were students, 10% were housewives and 9% were pensioners. The data of *Innibos* clearly shows that professionals, managers and students represented 13% of the research population. At *Oppikoppi* the single largest category was students (30%) followed by managers (17%) and professionals (15%).
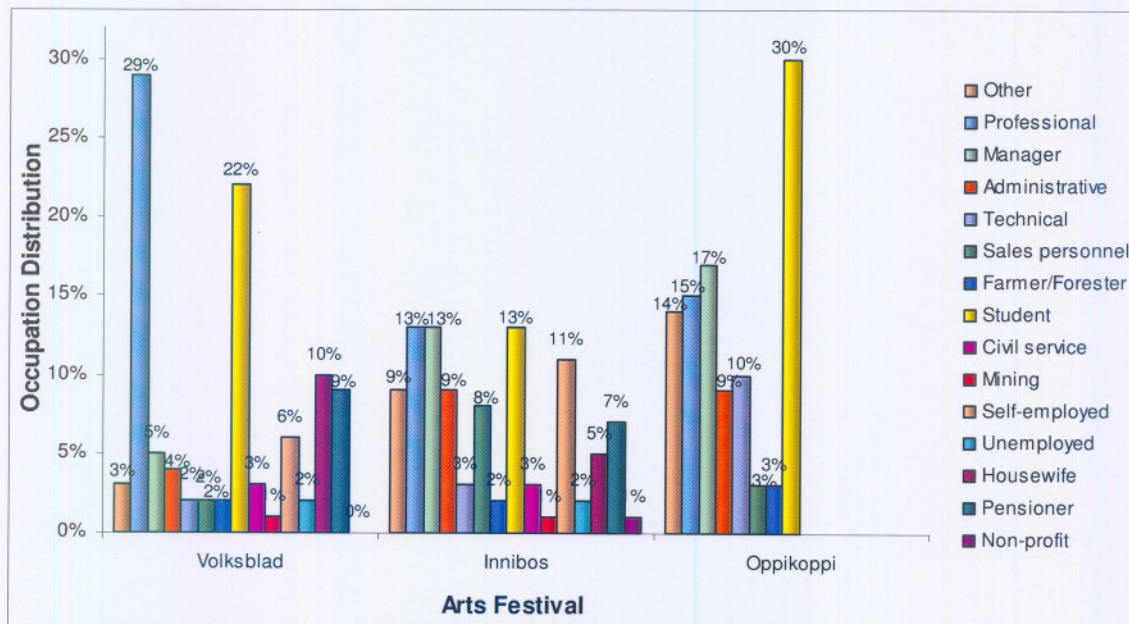
Figure 4.5: Occupation distribution

The *Volksblad* festival was attended by 29% professionals and 22% students. This is due to the location of the festival, which is held at the University of the

Free State in Bloemfontein. The occupational distribution at *Innibos* is more evenly spread; thus clearly no dominant occupation can be identified. *Oppikoppi*, situated in Northam, which is close to Gauteng and North West, is a popular festival for students from Gauteng and North West. Many students attend *Oppikoppi*, because, although it is not that close to the university it gives them the opportunity to go camping with friends and it is held during a long weekend.

4.2.6 Travel group size
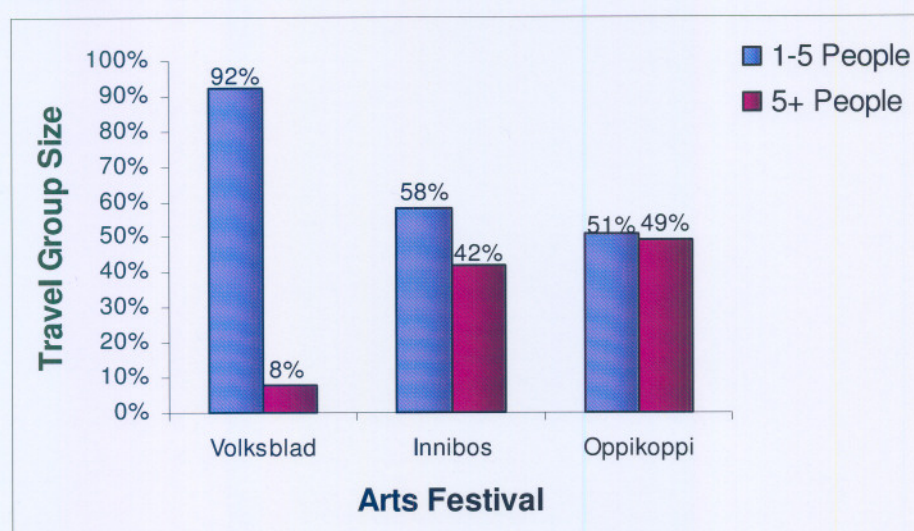
Figure 4.6: Travel group size

Figure 4.6 indicates the travel group size of the tourists to the festivals. *Volksblad* and *Innibos* are family festivals and that could be the reason for smaller travel groups of 1-5. *Oppikoppi* is a student festival as mentioned previously. Students travel in bigger groups to save money and to enjoy themselves as a group of friends: thus, the average of 5 people per travelling group for *Oppikoppi*.

4.2.7 Nights spent

Figure 4.7 represents the number of nights spent at the festival. The data of *Volksblad* is evenly spread with 26% of festival attendants staying one night,

25% over two nights, 18% over three nights and 15% over four nights. The reason might be that Bloemfontein is used as a secondary destination and not as a primary destination. Travellers may stop en route to Cape Town at Bloemfontein from Gauteng for an overnight rest. Another reason is that a large number of locals visit the festival as well.
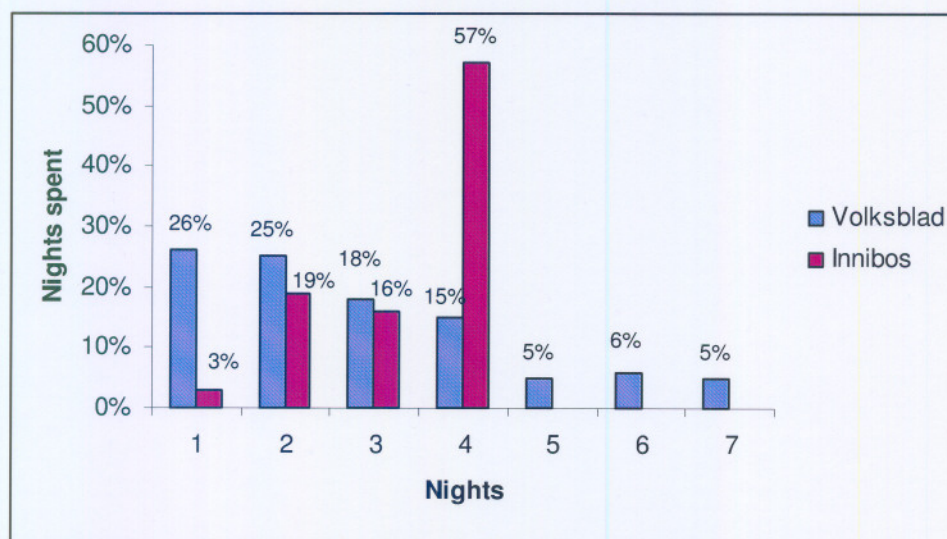
Figure 4.7: Nights spent

Most of the respondents of *Innibos* spent 4 nights. The rest of the attendees are local people and therefore do not need accommodation. The festival is held during school holidays. It is thus easy to attend the *Innibos* festival.

The *Oppikoppi* attendants stay 3.4 nights on average. For this festival attendants buy a ticket for the full duration, hence this question was omitted.

4.2.8 Province distribution

Figure 4.8 indicates the provinces that the festival attendants come from. The data of *Volksblad* indicates that 85% of the visitors were from the Free State,

which is the host province, 5% of the respondents came from Gauteng, 3% from the Northern Cape, and 2% from the Western Cape and Eastern Cape respectively. The festival was also attended by visitors from the North West Province (1%) and visitors from outside South Africa (0.8%).

The data of *Innibos* shows that 56% of the visitors were from Mpumalanga (host province), while 29% came from Gauteng and 3% from North West.

Most of the *Oppikoppi* visitors came from Gauteng (70%). North West Province was represented by 16% of visitors, while 8% of attendants came from the Free State.
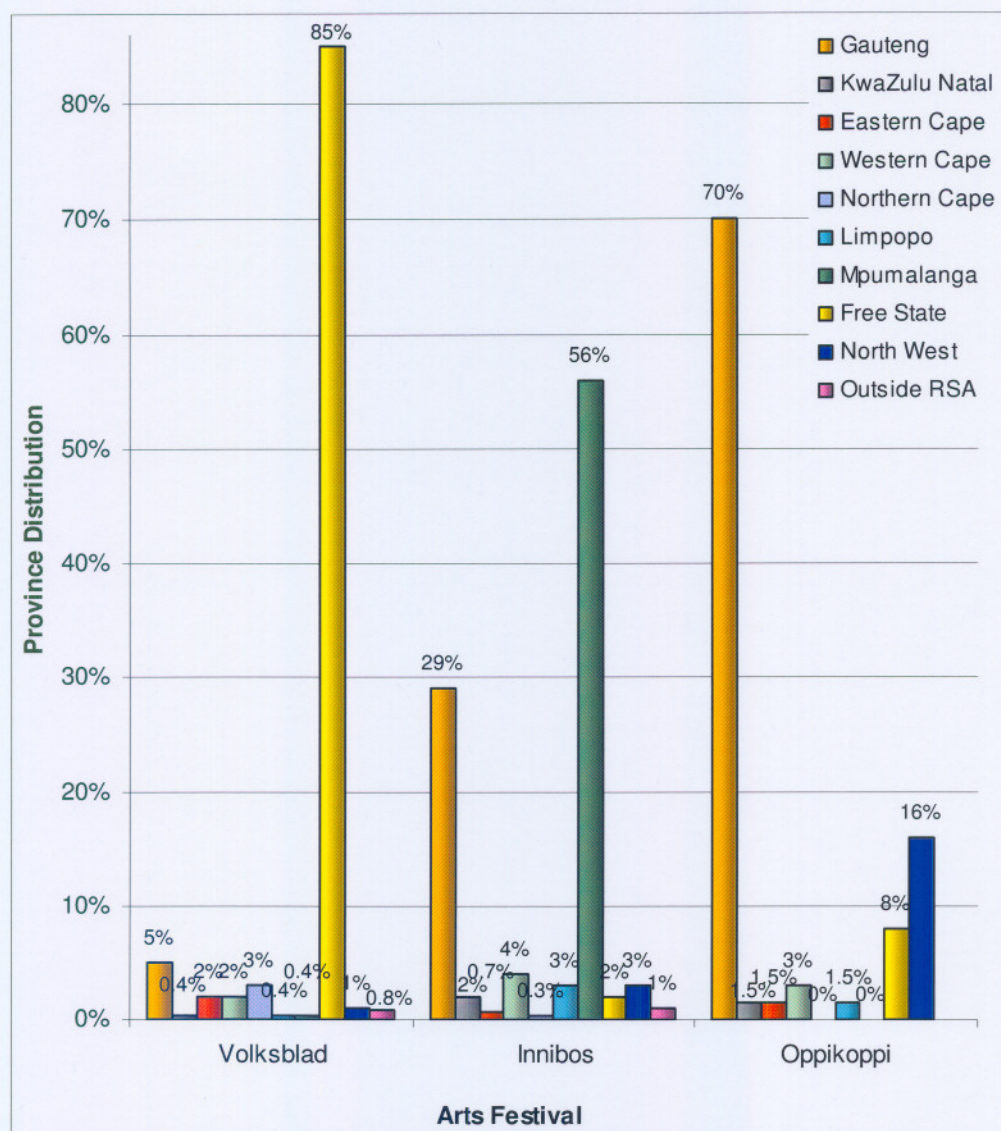
Figure 4.8: Province distribution

4.2.9 Expenditure at festivals

Table 4.1: Expenditure at Volksblad

ITEM	EXPENDITURE (average)
Accommodation	R13.00
Food & Restaurant	R94.96
Alcohol	R47.37
Non-alcoholic	R22.94
Tobacco	R5.60

Shows	R127.55
Shopping	R75.14
Souvenirs	R60.66
Transport to festival	R65.81
Transport during festival	R10.17
Parking	R0.27
TOTAL	**R 538.07**

Table 4.2: Expenditure at Innibos

ITEM	EXPENDITURE (average)
Show Tickets	R159.69
Accommodation	R145.25
Food and restaurants	R192.66
Transport	R56.76
Alcoholic drinks	R154.29
Non-alcoholic drinks	R50.28
Shopping at retail stores	R103.06
Tobacco products	R35.24
Souvenirs and gifts	R74.16
Parking	R15.70
Others	R74.90
TOTAL:	**R1062.11**

Table 4.3: Expenditure at Oppikoppi

ITEM	EXPENDITURE (average)
Entrance	R561.75
Food	R295.45
Alcohol	R527.25
Transportation	R260
Other: on cigarettes and cd's and T-shirts	R25.5
TOTAL:	**R 1669.95**

The average expenditure by festival attendants (on average) shows the highest expenditure at *Oppikoppi*, followed by *Innibos* and *Volksblad*. The main reason

for this can be that *Oppikoppi* is situated far from the nearest town. Attendants need to take all supplies along or need to buy food at the festival, so the spending tends to be higher at the festival itself. *Oppikoppi* has a larger entrance fee than *Innibos* and *Volksblad* does not have an entrance fee. More money is spent on food and alcohol at *Innibos* and *Oppikoppi*. Local attendants also have an influence on spending. Saayman and Saayman (2004:634) states visitors that do not stay in the host city spend more than twice as much as locals. It is therefore understandable that event organisers aim to attract more visitors from afar than locals. Another aspect that will have an influence on spending is the number of days spent at the festival.

4.2.10 Accommodation distribution

Figure 4.9 gives an indication of the accommodation distribution at the three festivals. At the *Volksblad* festival the majority of respondents (73%) were local residents from Bloemfontein. This means that these respondents did not spend any money on accommodation. 14% of the respondents stayed with family and/or friends, and 4% at Guesthouses/ Bed and Breakfast establishments. Only 1% of visitors stayed at a camp site, rented a house or stayed at a hotel respectively. The 'other' category (3%) entailed accommodation at hostels.
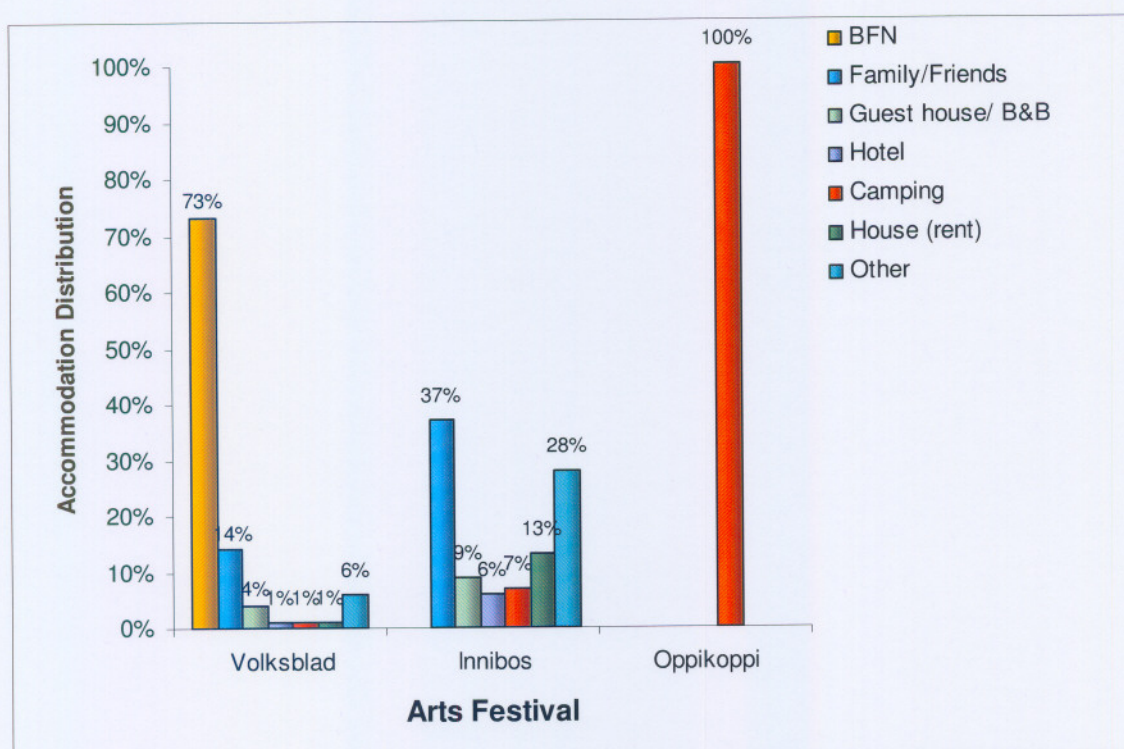
Figure 4.9: Accommodation distribution

At *Innibos* 37% of the people stayed with family and friends, 9% in Guest houses/Bed and Breakfast facilities, 6% in hotels, 7% on camping sites, 13% in rented houses and 28% used other forms of accommodation. Of the 28% in the category "other", respondents indicated that they stayed in hostels, on the train and at their own homes, as they were locals. Most attendees stayed at family or friends. This also means that they did not spend money on accommodation. All the visitors to *Oppikoppi* used the camping site provided, because accommodation at the camping site is included in the entrance fee.

4.2.11 Other festivals attended

Other festivals attended by tourists are indicated in Figure 4.10. The data of the *Volksblad* festival clearly indicates that 41% of the respondents have visited KKNK over the past three years, while 34% visited Aardklop and 12% visited the

Grahamstown festival. The Gariepfees held in Kimberley was, amongst other, (8%) festivals that the respondents have visited over the past three years.
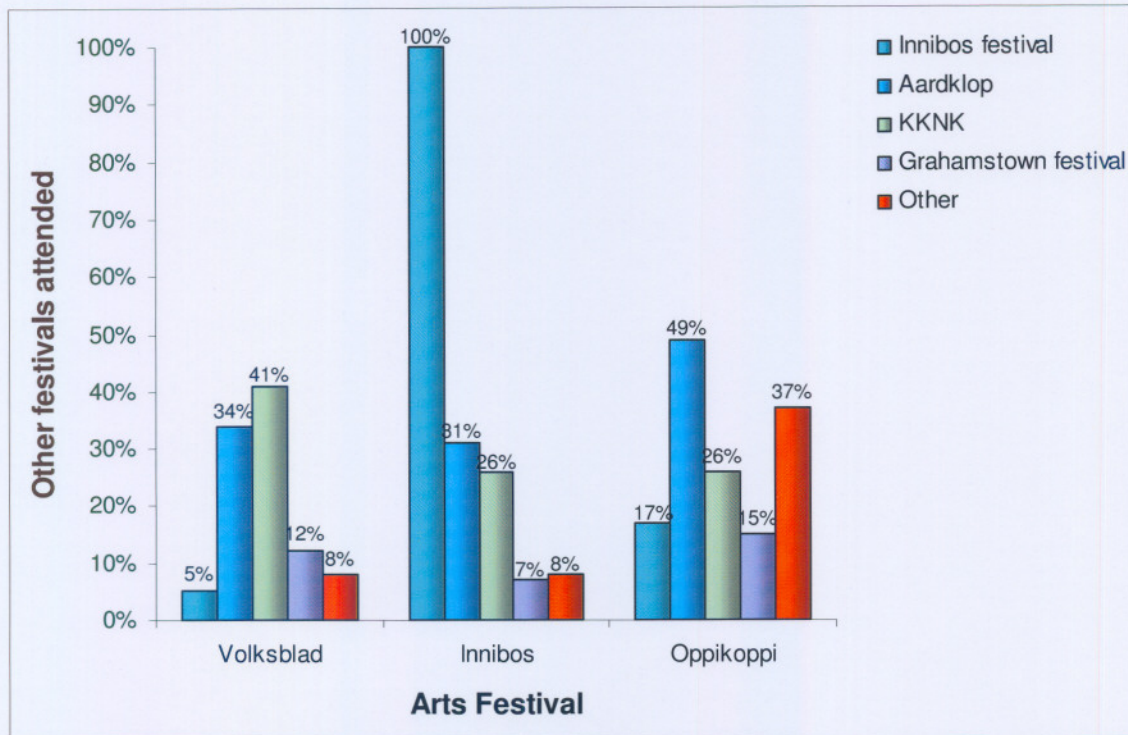
Figure 4.10: Other festivals attended

Visitors to *Innibos* indicated that 31% of them had attended the Aardklop festival in Potchefstroom, 26% had attended KKNK in Oudtshoorn and 7% had attended the Grahamstown National Arts Festival, while 8% indicated that they had attended other festivals.

At *Oppikoppi*, 49% of respondents had visited Aardklop, 26% KKNK, 23% Woodstock, 17% *Innibos*, 15% the Grahamstown festival and 14% the *Volksblad* festival. They might attend other festivals like Splashy fen.

In general, most of the festival attendees had previously visited Aardklop and/ or KKNK. This mean that the same group of people attend the same kind of festivals and therefore a clear indication of the target market is set for the marketers of the different festivals. Previous studies indicate that Aardklop and KKNK are also dominated by Afrikaans speaking visitors (Saayman & Saayman, 2004:634). This could be the reason why a large number of these visitors attended Aardklop and KKNK, seeing that Afrikaans speaking attendants are the primary target group (as indicated by Figure 4.3).

4.2.12 Mode of transport distribution

Figure 4.11 represents the mode of transport used by the festival attendants.

The majority of respondents at *Innibos* (86%) used a sedan to reach the festival, whereas 13% made use of a 4x4 vehicle and 14% used other forms of transport.

To travel to *Oppikoppi*, 73% of all respondents used a sedan, 22% travelled by 4x4 vehicles, 5% used a kombi and 2% made use of a tour bus.

A large number of tourists use their own car – usually a sedan - to travel to festivals. The mode of transport used most often, is a sedan.
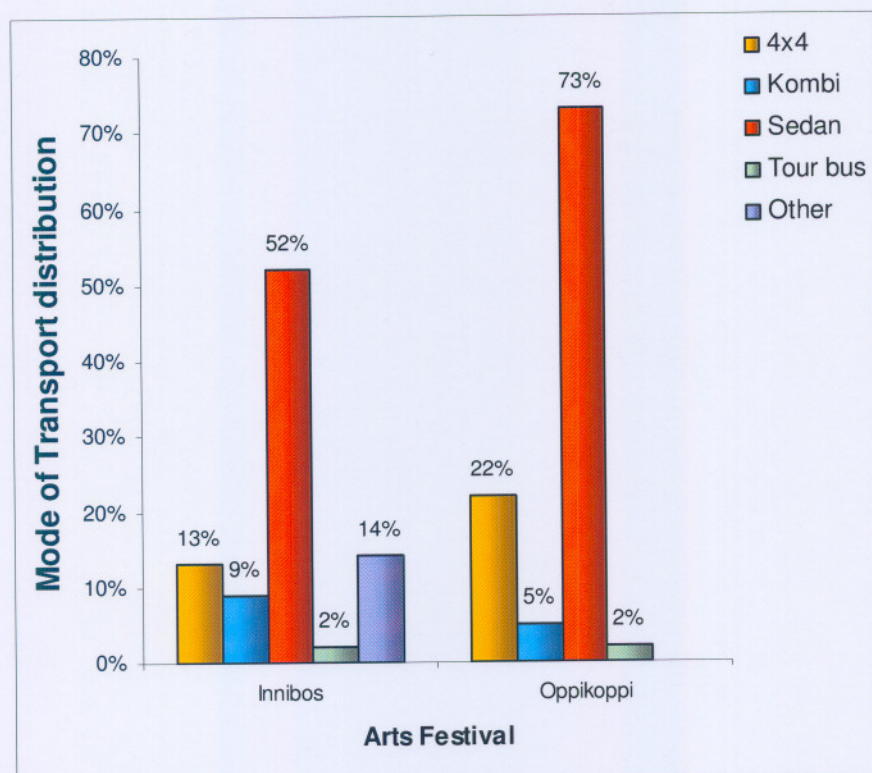
Figure 4.11: Mode of transport distribution

4.2.13 Attendance of free shows
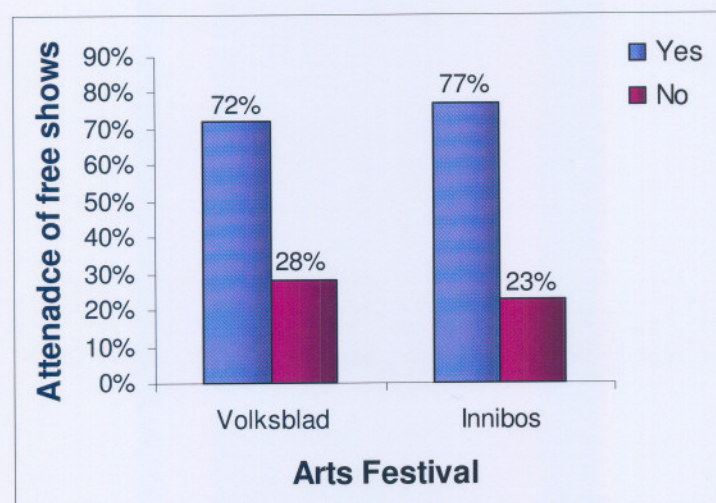
Figure 4.12: Attendance of free shows

Figure 4.12 depicts the attendance of free shows. At the *Volksblad* festival, the free shows were attended by 72% of festival attendants. However 28% of attendants did not attend the free shows. At *Innibos* free shows were attended by 77% of people, while 23% chose not to attend the free shows.

At *Innibos* an entrance fee is charged, so people might feel that they should go and see a free show in order to get their money's worth. The rest of the population at *Innibos* buy tickets for scheduled shows and therefore do not attend the free shows. *Oppikoppi* has a different structure, because there is a once-off amount paid at the entrance that includes all the shows on the different stages.

4.2.14 Reservations
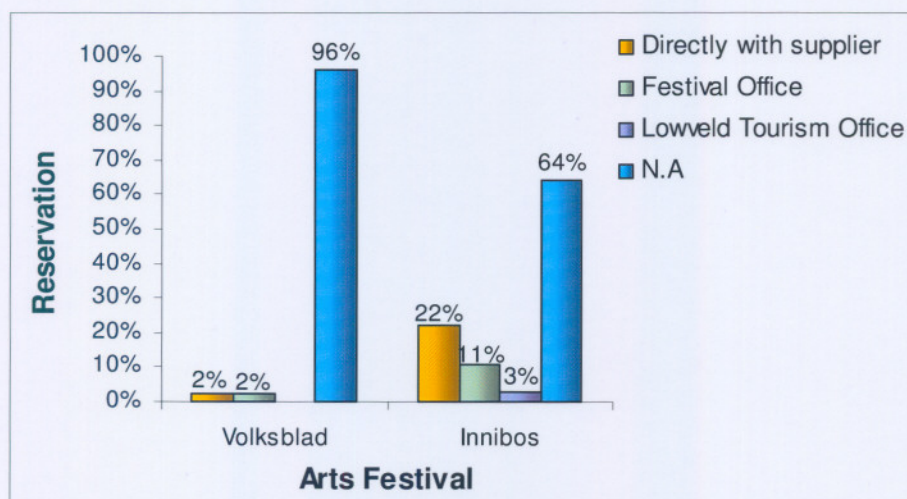
Figure 4.13: Reservations

Reservation of accommodation by tourists is depicted by Figure 4.13.

At the *Volksblad* festival 96% of the respondents indicated that it was not applicable, 2% used the festival office and 2% booked directly with the supplier.

The data of *Innibos* shows that 64% of respondents indicated that it was not applicable, 22% booked directly with the supplier, 11% used the festival office and 3% used the Lowveld Tourism Board.

Most tourists do their own bookings or stay with friends and family, thus they do not make use of reservation agencies. Another reason for not using reservation agencies might be that they do not know of services like festival offices.

At *Oppikoppi* it is not necessary for this service, because festival attendants stay at the farm and do not have to search for alternative accommodation.

4.2.15 Main reason for visit
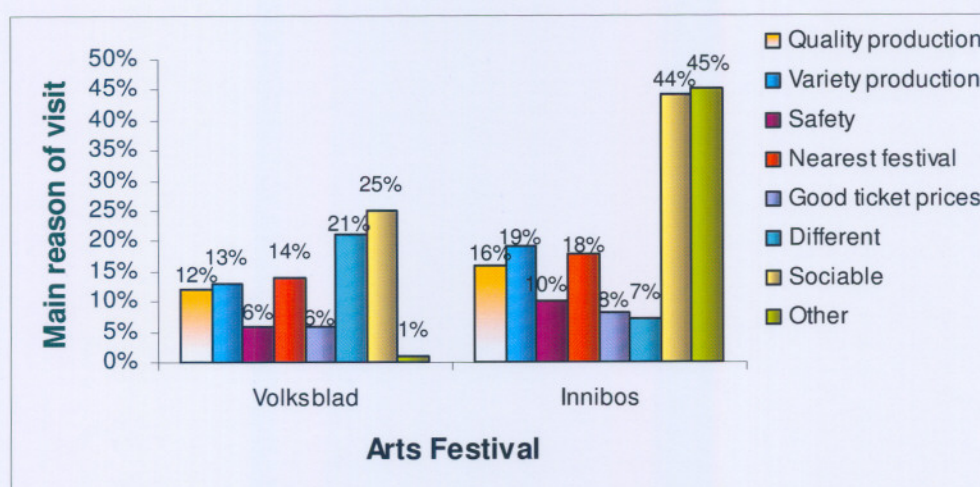
Figure 4.14: Main reason for visit

The main reasons for visiting a festival are presented in Figure 4.14.

At the *Volksblad* festival, 25% of the attendees indicated that they attended because it was sociable, while 21% said they attended because this festival was different.

A total of 45% of visitors to *Innibos* visited this festival for reasons not mentioned and 44% said the reason for their visit was to social with other people.

Volksblad and *Innibos* festival attendants attend these festivals because they are sociable. Other reasons for attending *Innibos* might be that they live close to the area, or that they just came to see what this festival has to offer, seeing that this is one of the newest festivals and also the only festival in these areas.

Oppikoppi does not offer a variety of different productions and that is why this question was omitted.

4.3 RELATIONSHIPS BETWEEN VARIABLES

The following will be used in the tables of the relationships between variables:

- ➤ Row pct = Row percentage

- ➤ Col pct = Column percentage

The relationship between the three festivals and the biographical data was determined. For the purposes of this study it is important to know whether a relationship between two variables for example gender versus festival is practically significant. For random samples, the statistical significance of such relationships is determined with the Chi-square test, but one actually wants to know whether the relationship is large enough to be important. This will indicate whether there is a relationship between various variables and a certain festival and finally assist with drawing up a profile of the festival.

In this case the effect size is given by w= $\sqrt{}$ (x²/n), where x² is the usual Chi-square statistics for the contingency table and *n* is the sample size (Steyn, 2000:1). In the special case of a 2x2 table, the effect size (*w*) is given by phi (Φ) coefficient. Note that the effect size is again independent of sample size. Ellis and Steyn (2003:51) give the following guidelines for the interpretation of the effect size in the current case:

(a) small effect: w = 0.1, (b) medium effect: w = 0.3, (c) large effect: w = 0.5.

A relationship with w ≥ 0.5 is considered to be practically significant.

The practical significance of results is not only important when the results of population data are reported but also to comment on the practical significance of

statistical significant results in the case of random samples from populations (Ellis & Steyn, 2003:53).

Another method was used to analyse the data for travel group size and days spent at festivals. The ANOVA table measures the difference in average and the difference between groups are analysed by means of the Tukey HSD.

Definition of ANOVA: An ANOVA (Analysis of Variance), sometimes called an F test, is closely related to the t-test. The major difference is that, where the t test measures the difference between the means of two groups, an ANOVA tests the difference between the means of two or more groups. A one-way ANOVA, or single factor ANOVA tests differences between groups that are classified with only one independent variable (ANOVA, 2006). The breakdown of the total sum of squares and associated degrees of freedom is displayed in the form of an analysis of variance table (ANOVA table) (Kutner et. al., 2005:67). After this the Tukey HSD (Honesty Significant Different) test is done where the Cohen is calculated (Cohen, 2006). Cohen (1988) gives the following guidelines for the interpretation of the effect size in the current case:

$$\text{Cohen d} = \frac{\bar{x}_1 - \bar{x}_2}{\sqrt{MSE}}$$

If d= 0.2 the effect is small

If d = 0.5 the effect is medium

If d = 0.8 the effect is large

Data with $d \geq 0.8$ is considered as practically significant.

4.3.1 Relationship between gender and festivals

Table 4.4: Statistics for festival by gender

Frequency Percent Row Pct Col Pct	Festival	Gender		Total
		Male	Female	
	Innibos	237	336	573
		19.33	27.41	46.74
		41.36	58.64	
		44.30	48.63	
	Oppikoppi	116	85	201
		9.46	6.93	16.39
		57.71	42.29	
		21.68	12.30	
	Volksblad	182	270	452
		14.85	22.02	36.87
		40.27	59.73	
		34.02	39.07	
	Total	535	691	1226
		43.64	56.36	100.00
Phi coefficient 0.12				

Table 4.4 indicates the relationship between gender and festivals. The phi coefficient (0.12) indicates that there is a small effect which means there is no significant relationship between festivals and the gender of festival attendants. In research done (Optimum market-positioning models for South African Arts festival scenarios) by Van Zyl (2005:211) the gender distribution for Aardklop, Grahamstown and KKNK was similar. Hence it can be concluded that the gender of festival attendants is of no importance.

4.3.2 Relationship between occupation and festivals

Table 4.5: Statistics for festivals by occupation

Frequency Percent Row Pct Col Pct	Occupation								
Festival	Professional	Manager	Administrative	Technical	Sales	Farmer	Student	Other	Total
Innibos	74	75	49	15	44	11	73	215	556
	6.13	6.21	4.06	1.24	3.65	0.91	6.05	17.81	46.06
	13.31	13.49	8.81	2.70	7.91	1.98	13.13	38.64	
	31.90	56.82	56.82	33.33	68.75	40.74	31.47	55.27	
Oppikoppi	30	33	18	20	9	5	59	27	201
	2.46	2.73	1.49	1.66	0.75	0.41	4.89	2.24	16.65
	14.93	16.42	8.96	9.95	4.48	2.49	29.35	13.43	
	12.93	25.00	20.93	44.44	14.06	18.52	25.43	6.94	
Volksblad	128	24	19	10	11	11	100	147	450
	10.60	1.99	1.57	0.83	0.91	0.91	8.29	12.18	37.28
	28.44	5.33	4.22	2.22	2.44	2.44	22.22	32.67	
	55.17	18.18	22.09	22.22	17.19	40.74	43.10	37.79	
Total	232	132	86	45	64	27	232	389	1207
	19.22	10.94	7.13	3.73	5.30	2.24	19.22	32.23	100.00
Phi coefficient 0.35									

Table 4.5 gives and indication of the relationship between the festivals and various occupations. The phi coefficient of 0.35 indicates a medium effect. At *Innibos* the variable that is notably higher than the rest is the 'other' occupation variable. This does not specify the type of occupation. At *Oppikoppi* the student variable plays a large role. At *Volksblad* the most significant variables are the 'other' occupation, professional and student categories. This could be because the festival is held at the University and because there are various academic

institutions in the vicinity. All the attendants to festivals have an income or are still being supported by parents. The higher the income of attendants the more disposable income they have and the more they will spend (Lubbe, 2000:241).

4.3.3 Relationship between language and festivals

Table 4.6: Statistics for festivals by language

Frequency Percent Row Pct Col Pct	Festival	Language			Total
		Afrikaans	English	Other	
	Innibos	477	75	24	576
		38.84	6.11	1.95	46.91
		82.81	13.02	4.17	
		50.91	28.63	82.76	
	Oppikoppi	163	38	0	201
		13.27	3.09	0.00	16.37
		81.09	18.91	0.00	
		62.21	4.09	0.00	
	Volksblad	422	24	5	451
		34.36	1.95	0.41	36.73
		93.57	5.32	1.11	
		45.04	9.16	17.24	
	Total	1062	137	29	1228
		86.48	11.15	2.36	100.00
Phi coefficient 0.65					

Table 4.6 shows the relationship between the festivals and language. The phi coefficient (0.65) indicates that there is a significant relationship between the language that tourists speak and the festivals they attend. A large number of attendants of the three festivals are Afrikaans speaking. In other words should

this variable be removed, it will have an enormous impact on the festival. This could be because a large number of the productions offered are in Afrikaans. The primary market of these festivals is Afrikaans speaking people.

4.3.4 Relationship between provinces and festivals

Table 4.7 shows the three festivals and the relationship with the province of origin of the festival attendants. The phi coefficient of 1.016 indicates that there is a significant relationship between the festivals and province of origin of the festival attendants. Most of the tourists are from the same province in which the festival is held. This could be because people make last-minute decisions to visit the festival. The two variables that play a large role at *Innibos* are Mpumalanga and Gauteng. At *Oppikoppi* Gauteng is the variable that is significantly higher than the rest and has a big impact on the festival. The variable that will influence *Volksblad* is Free State. Van Niekerk, Saayman and Saayman (2005:35) concluded in their report about *Innibos* that the number of visitors outside Nelspruit needs to increase so that this festival will be even more beneficial to Nelspruit. This can be accomplished by doing more marketing in bordering provinces. Note that the total percentage of attendants to the three festivals mainly comes from the Free State, Gauteng and Mpumalanga. The relationship between the festivals and the local provinces are very strong, but if tourists from other provinces could be attracted there would be a considerable economic injection into the local economy.

Table 4.7: Statistics for festivals by province

Frequency / Percent / Row Pct / Col Pct

Festivals	Mpumalanga	Gauteng	North West	Free State	Eastern Cape	Western Cape	Northern Cape	KwaZulu-Natal	Limpopo	Outside RSA	Total
Innibos	324 / 26.43 / 56.45 / 99.39	167 / 13.62 / 29.09 / 51.07	17 / 1.39 / 2.96 / 31.48	12 / 0.98 / 2.09 / 2.91	4 / 0.33 / 0.70 / 28.57	21 / 1.71 / 3.66 / 61.76	2 / 0.16 / 0.35 / 11.11	11 / 0.90 / 1.92 / 68.75	13 / 1.06 / 2.26 / 72.22	3 / 0.24 / 0.52 / 50.00	574 / 46.82
Oppikoppi	0 / 0.00 / 0.00 / 0.00	139 / 11.34 / 69.15 / 42.51	32 / 2.61 / 15.92 / 59.26	15 / 1.22 / 7.46 / 3.63	3 / 0.24 / 1.49 / 21.43	6 / 0.49 / 2.99 / 17.65	0 / 0.00 / 0.00 / 0.00	3 / 0.24 / 1.49 / 18.75	3 / 0.24 / 1.49 / 16.67	0 / 0.00 / 0.00 / 0.00	201 / 16.39
Volksblad	2 / 0.16 / 0.44 / 0.61	21 / 1.71 / 4.66 / 6.42	5 / 0.41 / 1.11 / 9.26	386 / 31.48 / 85.59 / 93.46	7 / 0.57 / 1.55 / 50.00	7 / 0.57 / 1.55 / 20.59	16 / 1.31 / 3.55 / 88.89	2 / 0.16 / 0.44 / 12.50	2 / 0.16 / 0.44 / 11.11	3 / 0.24 / 0.67 / 50.00	451 / 36.79
Total	326 / 26.59	327 / 26.67	54 / 4.40	413 / 33.69	14 / 1.14	34 / 2.77	18 / 1.47	16 / 1.31	18 / 1.47	6 / 0.49	1226 / 100.00

Phi coefficient 1.016

4.3.5 Relationship between travelling group and days at festivals

Table 4.8: ANOVA Table

SS: Sum of squares

Df: Degrees of freedom

MS: Mean square

F: F ratio

P: P value

| Variable | Analysis of Variance Marked effects are significant at p< .05000 | | | | | | | |
	SS Effect	Df Effect	MS Effect	SS Error	Df Error	MS Error	F	P
Travelling group	4896.239	2	2448.119	36389.25	1227	29.65709	82.54753	0.000000
Days at festival	58.714	2	29.357	2505.75	1227	2.04217	14.37539	0.000001

From the above table it can be noted that both the travelling group and the number of days spent at the festival are significant. The following tables will explain how significant.

4.3.6 Relationship between travel group size and festivals

Table 4.9: Travelling group (Tukey HSD)

| Festival | Unequal N HSD; Variable: Travelling group Marked differences are significant at p < .05000 | | |
	{1} M=8.7065	{2} M=4.3865	{3} M=2.7832
Oppikoppi {1}		0.000022	0.000022
Innibos {2}	0.000022		0.000048
Volksblad {3}	0.000022	0.000048	

With reference to the table above if the Cohen d of the various festivals is calculated, the following are the Cohen d:

Between 1 and 2 = 0.79 (medium to large)

Between 1 and 3 = 1.02 (large)

Between 2 and 3 = 0.30 (small to medium)

The difference in travelling group size between *Oppikoppi* and *Innibos* as well as that between *Oppikoppi* and *Volksblad* is large. *Innibos* and *Volksblad* do not differ that much.

4.3.7 Relationship between days at festival and festivals

Table 4.10: Days at festivals

	Unequal N HSD; Variable: Days at festival Marked differences are significant at p<.05000		
Festival	(1) M=3.3881	(2) M=2.8952	(3) M=3.2987
Oppikoppi (1)		0.001487	0.805249
Innibos (2)	0.001487		0.000076
Volksblad (3)	0.805249	0.000076	

In the above table the various festivals and the average period that attendants stayed are compared.

Between 1 and 2 = 0.35 (small to medium)

Between 1 and 3 = 0.06 (small)

Between 2 and 3 = 0.28 (small)

In comparison, the difference between the numbers of days spent at the festival is small. This means that, at the three festivals, visitors stay approximately the same number of days. This is clearly depicted in Table 4.10 where M represents the average (mean).

Table 4.11: Expenditure at festivals

Festival	Number of Observations	Variable	Mean	Maximum
Innibos	577	Spent on Food	192.66	4 000
		Spent on Alcohol	154.29	10 000
		Spent on Transport	56.76	6 000
		Spent on Other	659.78	10 000
Oppikoppi	201	Spent on Food	293.98	2 000
		Spent on Alcohol	524.63	5 000
		Spent on Transport	258.91	1 200
		Spent on Other	590.00	900
Volksblad	452	Spent on Food	103.93	1 800
		Spent on Alcohol	98.66	3 500
		Spent on Transport	390.00	2 900
		Spent on Other	0.00	0.00

Table 4.11 shows the expenditure of tourists at the festivals. The mean (average), as well as the maximum spending of tourists on certain variables, is displayed. The average spent on food does not vary that much from festival to festival. The amount spent on alcohol is much higher at *Oppikoppi* than at the other two festivals. The maximum spending at *Innibos* and *Volksblad* is higher than at *Oppikoppi*.

The reason for this is that the questionnaire was completed by one person per family. At the family festivals *(Innibos* and *Volksblad)* the head of the family usually has to support his whole family, whereas *Oppikoppi* most of the attendants pay for themselves. Most of the visitor expenditure at arts festivals is on show tickets, food, accommodation and souvenirs. It is evident that, on

average, visitors spend almost twice the amount that locals spend at the festivals (Saayman & Saayman, 2004:638).

Mok and Iverson (2000:304) used the expenditure-based segmentation technique to explore whether tourists who varied significantly in travel can be identified by certain characteristics. If this identification is possible, tourism destinations can formulate strategies to attract more heavy spenders or to increase tourist spending at destinations. Results of this study showed that the heavy spenders had the following characteristics:

> They spent more on prepaid and local expenditure categories;

> They were younger;

> They stayed at the destination for longer periods;

> They had a smaller party size;

> They tended to travel individually rather than in groups.

This information can be used in further research studies.

4.4 SUMMARY

The goal of this study was to compile a profile for each of the festivals and to do a two-way relationship between different festivals and variables. This chapter analysed the survey results.

When segmentation studies are concluded, a number of smaller markets instead of one large market emerge (Haley, 1968:35). After an analysis of the data and a drawing of relationships, the following can be concluded about all the above information and a profile of each festival can be compiled.

The results emerging from this section are integrated by adopting a method recommended by Plog Associates (1976) in which "dry" statistics are transported into a "living" profile to which marketers can more easily respond. Using this personification approach introduced by the Plog research group, the festival attendants of the three festivals are named **Conrad** (Oppikoppi), **Marie** (Volksblad) and **Ina** (Innibos).

4.4.1 Results: Descriptive statistics

With all the data gathered from the festivals and the results thereof, an average festival goer to the three festivals can be determined. Table 4.12 indicates an average festival goer:

Table 4.12: Profile of each festival

VARIABLE	INNIBOS	VOLKSBLAD	OPPIKOPPI
AGE DISTRIBUTION	23	30	22
LANGUAGE	Afrikaans	Afrikaans	Afrikaans
MARITAL STATUS	Married	Married	Not married
OCCUPATION	Professional, manager	Professional, student	Student
TRAVEL GROUP SIZE	5	2	5
NIGHTS SPENT	4	5	4
PROVINCE DISTRIBUTION	Mpumalanga	Free State	Gauteng
EXPENDITURE	R1062,11	R538,07	R1669,95
ACCOMMODATION	Friends and	Friends and	Camp site provided

	family	family	
OTHER FESTIVALS ATTENDED	Aardklop	KKNK	Aardklop
TRANSPORT	Sedan	Sedan	Sedan
ATTENDANCE OF FREE SHOWS	77%	72%	N/A
MAIN REASON FOR VISIT	Socialising	Socialising	Socialising

Points that are notable from Table 4.12 will now be discussed.

Marie is a student at the University of the Free State. She is 23 years old. Her home language is Afrikaans. She visited the festival with a friend and they stayed for the duration of the festival. She spent R538,07 during the festival. She has visited KKNK in the past.

Ina (30) stays in Mpumalanga. Her mother tongue is Afrikaans. She is married and manages a bookstore. She travels in a group of more than 5 people – her husband, children and her parents. They went to the festival on 4 consecutive days. **Ina** spent R1062,11 during the festival. They stayed at their own home during the festival and made use of their own transportation. She and her family have visited Aardklop in the past.

Conrad stays in Gauteng and attends a university. He is 22 years old and Afrikaans speaking. He is not married. He and four of his friends travel together in a sedan. They stayed for the duration of the festival and camped in the area provided. He spent R1669,95 at the festival. He has visited Aardklop in the past.

There is a significant relationship between language, province, travel group and days spent at festivals. Thus it can be said that these three festivals are targeting Afrikaans speaking tourists of three different provinces namely, Free State, Gauteng and Mpumalanga.

From the above it can be concluded that the average *Volksblad* and *Innibos* attendant is more or less the same type of tourist. *Oppikoppi* and *Volksblad* also has a few similarities – this could be because of *Volksblad* being held at Bloemfontein which is a student city and because *Oppikoppi* attracting mostly students. These socio-demographic characteristic differences can help marketers develop the most effective strategies for product and service development, pricing, distribution channels and advertising (Jang *et al.*, 2002:377).

4.4.2 Results: Relationship between variables

Gender and occupation has a medium to small effect on the festivals, which means there is no relationship between festival attendants and gender or occupation.

The province from which festival attendants come, the language of attendants, days spent at festivals and travel group size all has a large effect on the festivals. This means that the phi coefficient is higher than 0,5. The three festivals under scrutiny are located in areas where Afrikaans is the language spoken by the majority. The provinces where the three festivals are held feed a number of attendants to the festivals. This could mean one of two things. Firstly, that local marketing or word of mouth is working for the festival and secondly, that the attendants decide on the spur of the moment to attend the festivals. From the information gathered above, it is clear that a large number of the attendants to the festivals are local people. This can be changed by means of improved marketing in bordering provinces.

The travel group size is larger for *Oppikoppi* than for Innibos and *Volksblad*. This information can be useful for marketing *Oppikoppi* as a tour group destination and *Volksblad* and *Innibos* as family gatherings.

Days spent at the festival do not differ that much. The average festival attendant stays for a period of three days.

The variables that was the focus point of this study was gender, occupation, language, province from which the attendants reside from, travel group size and days at festival. These results discussed in this chapter may be very helpful in future marketing or decision making processes.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

The purpose of this study was to identify tourist profiles as a segmentation variable for three arts festivals (Innibos, Oppikoppi and Volksblad) in South Africa.

This chapter, however, concludes the findings of the research and recommendations are made as a result of the research. The aims of this research were achieved as follows.

The primary goal was to use profile variables to segment the market of the selected festivals.

In achieving this goal the following objectives were met:

> A survey of selected festivals in South Africa was conducted in order to construct a profile for each festival and to do a two-way relationship between festivals and different variables.

> A historical overview of tourism was conducted to give a greater perspective of tourism and where events fit in, in the tourism industry.

> A thorough assessment of existing literature concerning market segmentation and market segmentation of festivals and events in particular were done.

5.2 CONCLUSIONS

The following conclusions following the research can be drawn, namely:

> Conclusions with regard to a historical overview of tourism
> Conclusions with regard to the profiles at the selected festivals; and
> Conclusions with regard to the survey.

5.2.1 Conclusions with regard to a historical overview of event tourism

Chapter two focused on the historical overview of event tourism, starting at the very first beginnings of tourism up to the present state of event tourism nationally and internationally. The tourism time line and highlights of South African tourism were explained.

The following are regarded as the main conclusions with respect to research objective 1 (cf. 1.3.2):

> Festivals and events have become strong demand generators and can make a significant contribution to the economy of the country. (cf. 2.1).
> Festivals and events have the following advantages (cf. 2.1):
>   • They are an important expression of human activity that contributes to social life;
>   • They are linked with tourism in order to create income for the host community; and
>   • They can create a demand in the so called "off-season".
> South Africa, just like any other developing country, realises the importance of event tourism which can contribute to the economy (cf. 2.1).
> Festivals are held annually; whereas events are once-off activities (these two terms can be very confusing) (cf. 2.2).
> The geographical distribution of South African festivals is diverse (cf. 2.3).

> Festivals are an indispensable feature of cultural tourism going back since the beginning of festivals and events like the ancient Olympic Games (cf. 2.4).

> Festivals are unique travel attractions because they do not rely upon expensive physical development (cf. 2.4).

> Grahamstown was the only arts festival that became well established during the 1980s (cf. 2.5).

> In the local context festivals only started in 1974, but this was the beginning of great things, because festivals and special events play a significant role in communities contributing to social upliftment and economical wealth (cf. 2.6).

5.2.2 Conclusions with regard to segmentation of tourism and events

In chapter three, market segmentation in the tourism sector was discussed. The importance of market segmentation was given as well as the advantages and disadvantages of market segmentation.

The following are regarded as the main conclusions with respect to research objective 2 (cf.1.3.2):

> Because of the competitive nature of the product there needs to be proper target markets set for marketing otherwise resources will be spent without any success (cf. 3.2).

> Segmentation has numerous benefits. Listed below are those that are the most common:

- Market segmentation allows marketers to concentrate on consumer needs and wants.

- Market segmentation enables more efficient market positioning.

- Recognising customers' differences is the key to successful marketing, because customers' needs can then be matched with the products and services of the company.

- Segmentation can lead to niche marketing where applicable. The organisation can meet most or all of the needs of customers in that niche segment.

- Segmentation can lead to concentration of resources on markets where competitive advantages are great and returns are high.

- By means of segmentation a competitive advantage may be gained by having a different approach than the market competitors.

- By means of segmentation, the organisation can be marketed as a specialist in the selected market segments, with a better comprehension of customers' needs; thus giving the products/services an advantage to the competitors' products.

- Segmentation promotes new product ideas (cf. 3.2.1).

➢ The division (segmentation) of the market can be done in various ways if the information of research is used correctly. Depending on the situation, a marketer may experiment with a variety of segmentation variables (cf. Table 3.1):

- Demographic
- Geographic
- Psychographic
- Social class
- Behavioural segmentation
- Socio-economic
- Purpose of travel

➢ A number of segmentation methods by different researchers were explained (cf. 3.22). An integrated process for smaller festivals was drawn up and is found to be the following:

1. Select market or product category.
2. List potential needs.
3. Select segmentation approach.

4. Profile segments.

5. Focus on one or two segments.

6. Position the product or service.

7. Do the marketing mix.

The steps were discussed and it was indicated how to apply each according to the product/ festival.

> Two approaches to the market were explained, namely the single target approach and multiple target approach. The first is focusing on one target group and the second using your resources on more than one target group (cf. 3.2.3).

> The criteria for segments were identified as the following:

- Measurable

- Accessible

- Substantial

- Reliable

- Durable

- Competitive

- Differential

- Actionable

- Validity

- Responsive (cf. 3.2.4).

5.2.3 Conclusions with regard to the results of the research conducted

In chapter four the results of the surveys were used to compile graphs and tables so that a profile of each festival can be designed. Relationships between the three festivals and profiles were made to see which variables had a significant impact on each festival.

The variables that were the focus point of this study were gender, occupation, language, province from which the attendants reside, travel group size and days

spent at festival. From these variables the outcome was that the following variables have a significant effect on the three festivals under scrutiny:

> province from which the attendants come from;

> language;

> travel group size; and

> days at festival.

5.2.3.1 The main conclusions of these three festivals were:

Oppikoppi:

> This festival is mostly for students who look for an escape from reality;

> The majority is Afrikaans-speaking people and of European descent;

> It is remarkable that the average age is not older than 25 years of age;

> It is based on the Woodstock festival.

Innibos:

> This is a family festival;

> Mostly visited by local people;

> Minority of the people make use of accommodation;

> Portugese influence.

Volksblad:

● This is a family festival with some influence from students because of the university and other education institutions;

> Mostly visited by local people;

> Minority of people use paid accommodation.

5.2.3.2 The profile was determined by the following:

> Gender;

> Age distribution;

> Language distribution;

> Marital status distribution;

- Occupation distribution;
- Travel group size;
- Nights spent;
- Province of origin distribution;
- Expenditure at festival;
- Accommodation distribution;
- Other festivals attended;
- Mode of transport distribution;
- Attendance of free shows;
- Reservations; and
- Main reason for visit.

Regarding research objective 3 (cf.1.3.2), the following was found:

Before a profile could be drawn up for each festival all the data was processed into graphs to see which variable had the highest percentage at each festival. In Table 4.12 the three profiles are revealed. For each of the three festivals a profile was drawn up and each of them was personified. It is clear that the three festivals differ from one another in terms of the structure of the events, target markets and demographics of the different festival attendants. Innibos and Volksblad have more entertainment for the whole family whereas Oppikoppi largely targets the student market. Oppikoppi attendants spend more on food and beverages. The reason for this is that Innibos and Volksblad attendants come from the host community whereas Oppikoppi is situated on a farm and the attendants camp at the camp site available and therefore have to buy their own food and beverages and cannot go home for lunch like the case is for the other festivals. This information can be used in future marketing strategies.

5.2.3.3 The three festivals are the same in the following aspects:
- Afrikaans-speaking people attend the festivals;
- Nights spent were 4 to 5 for all three festivals;

- ➤ The majority of attendants of all three festivals was from the host province;
- ➤ A sedan was used by the attendants of all three festivals;
- ➤ Attendance of free shows at Volksblad and Innibos was high; Oppikoppi does not have free shows because all the shows are included in the entrance fee, and
- ➤ All three festivals' attendants said their main reason for visiting was for socialising.

5.2.3.4 The differences between the three festivals are:

- ➤ Innibos and Volksblad are family orientated festivals, whereas Oppikoppi is mostly attended by students who are not married;
- ➤ Innibos is attended by professionals and managers, Volksblad by professionals and students and at Oppikoppi students dominated the attendance;
- ➤ Innibos' travel groups existed of 5 people, Volksblad only 2 and Oppikoppi varied from 1 to 5 per group;
- ➤ Expenditure at the various festivals also differed over the period of the festival: Innibos (R1062,11), Volksblad (R538,07) and Oppikoppi (R1669,95);
- ➤ Accommodation used by Volksblad and Innibos attendants was with friends and family while Oppikoppi attendants stayed in the camping site provided; and
- ➤ Innibos and Oppikoppi attendants said that they also visited Aardklop in the past, while Volksblad attendants visited KKNK in the past.

The relationship between variables at each festival separately indicated that gender and occupation has a medium to small effect on the choice to travel to a certain festival. Languages, the province from which festival attendants come, days spent at festival and travel group size, on the other hand, all have a large effect on the festivals, which means that it will influence the attendance of the festival if for example the language of the shows would suddenly change then the

target market will also undergo metamorphosis. This information can be incorporated in future marketing strategies. This will save money on unnecessary segments and the focus can be shifted to one or two target markets that will attend.

The purpose of this study was to identify tourist profiles as a segmentation variable for three festivals (Innibos, Oppikoppi and Volksblad). This information can be used in marketing and also to see if the market is already saturated and if there is room for more markets to be segmented.

5.3 RECOMMENDATIONS

This section will give recommendations regarding market segmentation of tourism and events and history of events as well as future research opportunities.

5.3.1 Recommendations regarding market segmentation of tourism and events

> In terms of segmentation, a model can be created for the specific festival.

> Marketing strategies can be developed to suit the unique composition of the different festivals in South Africa.

> The research indicated that no large groups speaking other languages than Afrikaans are present at the three festivals. It is recommended that festival managements should research other market segments to determine future markets in order to determine why they do not attend and what their needs are. By doing this, event managers can address and implement a growth strategy in order to sustain growth of these events.

> Variables that can be used to do market segmentation is the following:
  - Language
  - Age
  - Occupation
  - Travel group size
  - Other festivals attended

- Main reason for visiting the festival

The above variables' information gathered in this dissertation can be used in a marketing strategy to focus on one or more segments.

> An integrated process was selected from all the segmentation processes and was illustrated as follows:

Step 1: Analyse the product.

Step 2: Analyse the total market.

Step 3: Profile the market.

Step 4: Select the market.

Step 5: Position the product or service.

Step 6: Do the marketing mix.

The above process can be used by festival managers to segment their markets into smaller target groups.

> Stronger marketing must be done in other provinces.

> Festival marketers have to look at local communities and involve them and their needs to ensure that there are no leakages.

5.3.2 Recommendations regarding further research

> The process to pursue when doing target marketing needs to be further researched so that it can be implemented by any tourism destination.

> Promotional methods used need to be explored and new methods need to be implemented.

> Research on upcoming events and their impact on South Africa's economy as well as its social well being can be conducted.

> Events such as the World Cup in 2010 can be researched for the social and economical impact on the country.

> The three festivals in this dissertation can be compared to other festivals

➤ The total festival marketed can be studied and the gaps in the market can be identified, or it can be determined if the market is already saturated.

➤ The research for this dissertation was collected during 2005 and therefore it would be favourable for these three festivals if research about the different profiles can be conducted annually. The reason being festivals are dynamic and change from year to year.

The outcome of this study was that the three festivals are in some ways the same but also differ in certain aspects. Tourism is a growing industry and therefore there are a number of subjects that can be used in further research.

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